

Symphony Circulation

Training Guide



SirsilDynmix®

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Introduction

Training Overview

Intended Audience

This guide is intended for those users who will be working with patrons at the circulation desk.

Prerequisite

The [Essential Skills self-paced course](#) and [associated guide](#) are pre-requisite to all Symphony classes. Be sure to understand the Essential topics before learning any other Symphony training.

Goals

After completing this guide and/or the corresponding course(s), staff will know how to:

- Manage user accounts
- Circulate Material
- Manage Bills/Fines
- Work with Items
- Handle custom scenarios

Getting Connected

Access information to your particular Symphony installation will not be provided during training. Your Site Administrator will receive connection details from SirsiDynix.

Circulation Quick Start

The Circulation module is multi-faceted. However, there are a few basic functions that most of you will need to understand on day one. We will begin with these basic concepts. You can then grow your Circulation skill set around the additional features that you choose to use at your library.

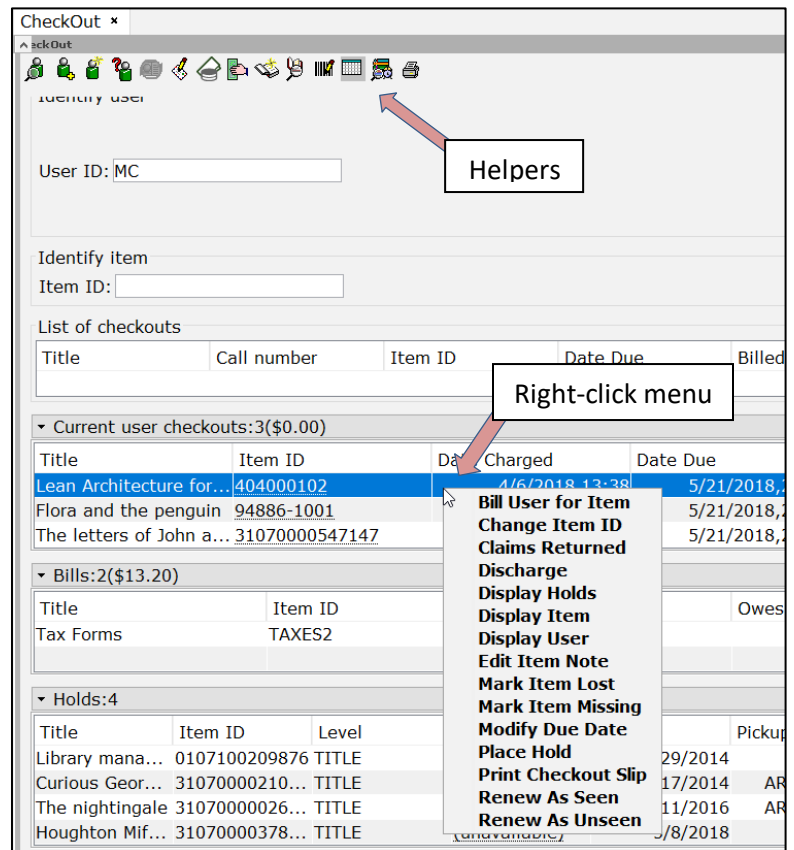
1. Checking Material Out
2. Checking Material In
3. Placing Holds
4. Managing Payments
5. Researching User Issues

Check Material Out

Checking material out to patrons is as easy as scanning the user and item barcode(s). However, situations will come up that require something more. When that happens, the answer will be in one of the helpers, or, in a right click menu (if enabled). Be sure to take time to explore the helpers and right-click menu options available to you. A familiar example would be the User Search and Item Search helpers that were discussed in the [Essential Skills self-paced course](#) and [associated guide](#).

Check Material In

Checking material in from patrons is as easy as scanning the item barcode(s). However, situations will come up that require something more. When that happens, the answer will be in one of the helpers, or, in a right click menu (if enabled). Be sure to take time to explore the helpers and right-click menu options available to you.



Placing Holds

When an item is not available on the shelf, you can place a hold on the material to place the patron in line for the item. In this case, you will not have the item to scan. After scanning the user's barcode, you will need to use the Item Search helper to locate the desired title. If you have not already reviewed the [Essential Skills self-paced course](#) and [associated guide](#), be sure to do so in order to maximize your searching skills.

Once the item has been selected, you can simply click Place Hold. However, take a moment to notice that there are options for adding special comments, expiration dates, etc to create a more specific hold configuration for each unique situation.

| | |
|---|--|
| Identify item | |
| Item ID: <input type="text" value="102561-1001"/> | |
| Hold Info | |
| <input type="checkbox"/> Mail Item to User | |
| Pickup at: | <input type="text" value="ARROWOOD"/> |
| Expires: | <input type="text" value="8/24/2020"/> |
| Delivery Method: | <input type="text"/> |
| Estimated shipping cost: | <input type="text"/> |
| Comments: | <input type="text"/> |
| Date suspended: | <input type="text"/> |
| Date unsuspended: | <input type="text"/> |
| Level/Range | |
| Level: <input type="radio"/> Copy <input checked="" type="radio"/> Title | |
| Range: <input type="radio"/> Library <input type="radio"/> Group <input checked="" type="radio"/> System | |
| Recall status | |
| <input type="radio"/> Allow Recall <input checked="" type="radio"/> No Recall <input type="radio"/> Recall now (RUSH) | |
| <input type="checkbox"/> Make hold first in queue <input type="checkbox"/> Reserve hold | |

Managing Payments

When an overdue item is checked in or an item is marked as Lost, bills will automatically be created in the system. You will need to know how to accept payments for these bills, as well as how to cancel part or all of the bill.

You can accept payments or cancel bills from the Pay Bills wizard or helper (found in many of the Circulation wizards). Within this tool, you can enter the amount being paid, even if less than the total bill, as well as note how the patron paid.

If you need to cancel all or part of a bill, rather than entering a payment type of CASH or CARD, select either CANCEL or FORGIVE. FORGIVE is used to represent the library giving the patron "a break". In essence, they owed it, but we are helping them out a bit. CANCEL is used to represent the library needing to fix a mistake that needs corrected.

Note that if the patron has multiple bills, you can use the lower section of the window to pay a specific bill, rather than all at once.

The screenshot shows the 'Pay Bills' wizard interface. At the top, there is a summary section for 'Total bills and payments' with fields for 'Total bills: 2', 'Total owed: \$13.20', 'Still owes: \$13.20', and 'Credit balance: none'. Below this is a 'Payment:' field with a dropdown menu currently set to 'CASH'. A red arrow points from a callout box labeled 'Pay ALL bills here' to this dropdown menu. Below the summary is a table titled 'Individual Bills and Payments' with columns: Title, Item ID, Reason, Owes, Payment Type, Payment, Change, Billed, and Date. The table contains two rows: 'Tax Forms' with Item ID 'TAXES2', Reason 'DAMAGE', Owes '\$10.20', Payment Type 'CASH', Payment '15.00', Change '\$12.00', Billed '4/10/2018', and Date '4/10/2018'; and a second row with Reason 'MISC', Owes '\$3.00', Payment Type 'DEBITCARD', Payment, Change '\$3.00', Billed '4/10/2018', and Date '4/10/2018'. Below the table, there are sections for 'Current user checkouts:3(\$0.00)' and 'Holds:4'. A red arrow points from a callout box labeled 'Pay SPECIFIC bills below' to the 'Payment Type' dropdown menu of the first row in the table. The dropdown menu is open, showing options: DEBITCARD, FOOD4FINES, FORGIVEN, FOUNDITEM, MASTERCARD, and NONE.

| Title | Item ID | Reason | Owes | Payment Type | Payment | Change | Billed | Date |
|-----------|---------|--------|---------|--------------|---------|--------|---------|-----------|
| Tax Forms | TAXES2 | DAMAGE | \$10.20 | CASH | 15.00 | | \$12.00 | 4/10/2018 |
| | | MISC | \$3.00 | DEBITCARD | | | \$3.00 | 4/10/2018 |

Researching User/Patron Issues

While it is nice to think that patrons will never have questions or issues, we know better. The best place to navigate most user questions is the Display User wizard. At first glance, this wizard shows current information, such as check outs, holds, bills, holds, etc. However, if you take time to explore the helpers, filter choices (bottom of each tab), and glossaries (dotted underlines under barcodes or bill amount).

The Print helper (🖨️) along the top is fantastic for printing user data. You can control what information to include in the printout.

At the bottom of most tabs, you will have options to filter the data displayed, such as paid vs. unpaid bills.

Within each tab, you will find a dotted underline under barcodes, bill amounts and etc. Anytime you see a glossary, take a moment to click on it to see the additional information available. This is fantastic for looking back at how a user paid or when he or she was sent a notice.

You can also right-click on the records showing in each tab to view additional action items, such as renewing, changing due dates or editing notes.

The screenshot shows the 'Bills' tab in the Display User wizard. The main window displays a table of unpaid bills with columns for Title, Item ID, Reason, Owes, Billed, Date, and Payment library. A pop-up window titled 'Display User: Glossary' is open, providing detailed information for a specific bill. A red arrow points from a text box to the \$10.20 bill amount in the table. Another red arrow points from a text box to the 'Bills' filter dropdown at the bottom of the main window.

| Title | Item ID | Reason | Owes | Billed | Date | Payment library |
|-----------|---------|--------|------|---------|-----------|-----------------|
| Tax Forms | TAXES2 | DAMAGE | | \$10.20 | 4/10/2018 | ARROWOOD |
| | | MISC | | \$3.00 | 4/10/2018 | |

Display options
Library: All libraries Bills: Unpaid

Display User: Glossary
Item information
Title: Tax Forms
Call#: XX(102511.1)
Copy: 2

Bill information
Billed: \$12.00 Tax: Reason: DAMAGE
payments: 1 Date: 4/10/2018 Last notice:
Still owes: \$10.20 Number of notices: 0 Library: ARROWOOD
Transaction date: 4/10/2018 Date paid: 4/10/2018

Payments:
Payment date: 4/10/2018 Amount: \$1.80 Payment type: CASH
Payment library: ARROWOOD

Note:

Close

Each tab will have filtering options below.

This window is the glossary for the \$10.20 bill.

User Records

The entire reason for libraries is to make information available to people. Therefore, we will begin with User Record maintenance.

In this section you will learn to:

- Create user records
- Display user records
- Copy a user record
- Modify user records
- Confirm address information
- Replace a lost card
- Update a user's privileges
- Bar a user

User Record Overview

Each user in SirsiDynix Symphony must have a unique identification called the User ID. The user ID can be a number or name assigned by the library according to some scheme. Typically, library use random numbers for unique user identification, such as barcodes. This number may be scanned to perform circulation functions including check out materials, place holds, and create bills.

Library users are able to log onto the online catalogue using their user ID to perform secured functions such as placing holds, view checkouts and bills, and renew checked out items.

To maintain consistency, library staff should decide which conventions (e.g., using all caps, or mixed case lettering) to use when entering information in the user record.

User records do not only represent the people who borrow material, but library staff logins as well. Staff log in into the WorkFlows client – the staff interface – using a user record that controls access to job-related functionality. These user records (logins) contain a special profile that defines staff privileges. Privileges granted by login might include permissions to run reports, delete items, and participate in other basic circulation tasks.

SirsiDynix Symphony also utilizes user records to assign a status or condition to an item. For example, some libraries will check out items that need to be removed from the collection to a "DISCARD" user record.

Creating a User Record

The *User Registration* wizard is used to create a new user record in your library.

To create a new user

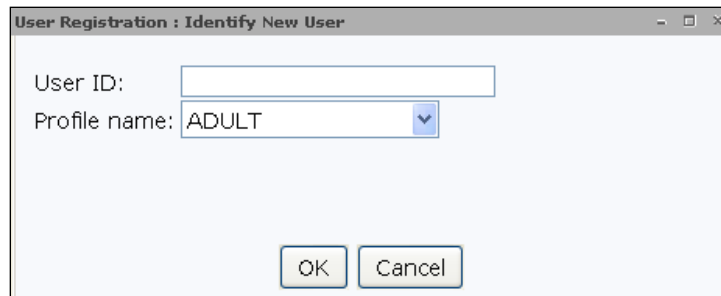
Navigate to the **Circulation toolbar**.

Open the **Users group** of wizards.

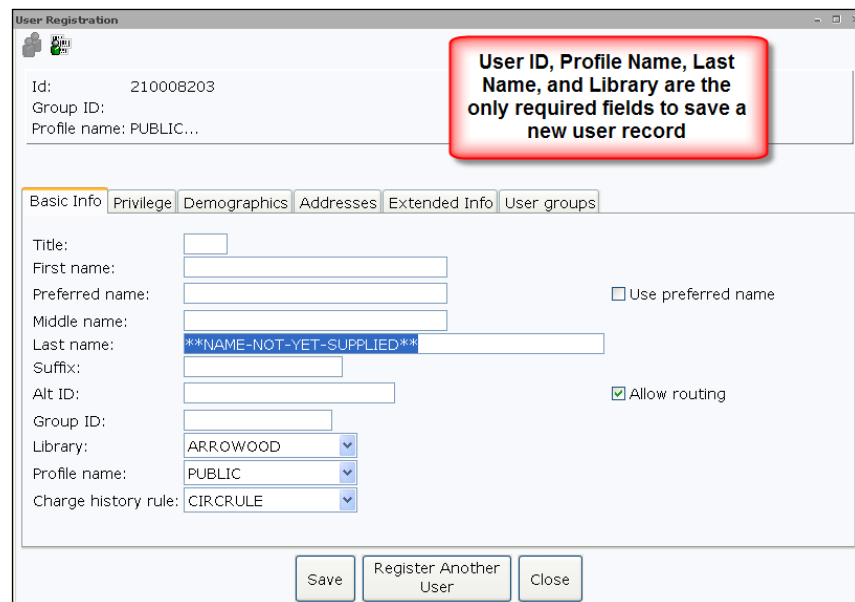
Click the **User Registration wizard**.

- 1.
- 2.
- 3.
- 4.

Select a Profile Name using the dropdown, if necessary. This determines a user's privileges like loan period and fine rate.



5. Scan the library card barcode into the User ID field, or type the User ID and select **OK**.



- 6.
- 7.
- 8.

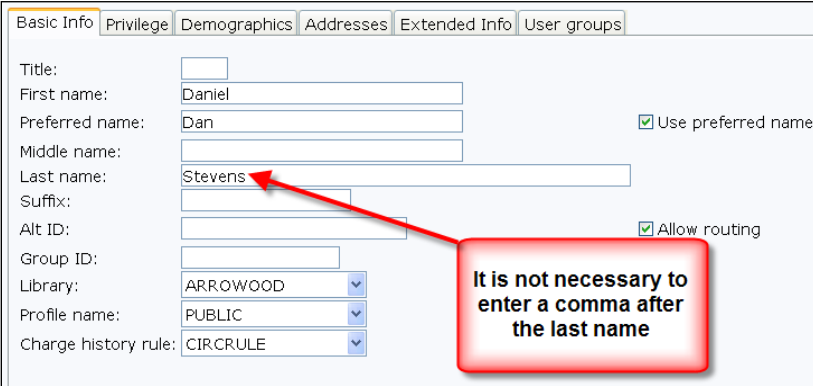
In the **Last Name** field, type in the user's last name.

In the **First Name** field, type in the user's first name.

Enter a preferred name and/or middle name, if necessary.

Select the Use Preferred Name box if the user wants his or her preferred name to display in WorkFlows and in the e-Library. This name will also print in reports.

9.



The screenshot shows a user profile form with the following fields and values:

| Field | Value | Checkbox |
|----------------------|----------|--|
| Title: | | |
| First name: | Daniel | |
| Preferred name: | Dan | <input checked="" type="checkbox"/> Use preferred name |
| Middle name: | | |
| Last name: | Stevens | |
| Suffix: | | |
| Alt ID: | | <input checked="" type="checkbox"/> Allow routing |
| Group ID: | | |
| Library: | ARROWOOD | |
| Profile name: | PUBLIC | |
| Charge history rule: | CIRCRULE | |

A red callout box with a red arrow pointing to the last name field contains the text: "It is not necessary to enter a comma after the last name".

10. Enter an Alt ID if necessary. This field can be an individually significant number like a Social Security number, Student ID number, or driver's license number. The Alt ID provides alternative access to user's record. Depending on the system's configuration, users may be able to log in to the online catalog using an Alt ID.

11. Enter a Group ID if necessary. An example is to use the name of a homeroom teacher (e.g., JOHNSON) as a Group ID for all the children's user records. Group IDs can be used to search a group of users or sort notice reports.

12. Verify the **Library policy** that will be tied to the user record. This is considered the user's home library.

13. Verify the **Profile Name**. This field carries over the value entered from the *User Registration* wizard. You can change this now if you previously selected the incorrect profile.

14. *NOTE: A user record can be saved with just the User ID, User Profile, Last Name and Library fields populated. You can enter the other information at a later time using the Modify User wizard.*

To continue filling in the user information, click the **Demographics** tab.

The screenshot shows the 'User Registration' window with the 'Demographics' tab selected. The form contains the following fields:

- Gender: [dropdown]
- Disability: [dropdown]
- Ethnicity: [dropdown]
- User cat 7: [dropdown]
- User cat 9: [dropdown]
- User cat 11: [dropdown]
- Birth date: [calendar icon]
- Language: English [dropdown]
- Child Internet Access: [dropdown]
- Marketing: [dropdown]
- User cat 6: [dropdown]
- User cat 8: [dropdown]
- User cat 10: [dropdown]
- User cat 12: [dropdown]

Using the dropdown fields, fill in the appropriate user categories. These are used for statistical purposes.

15. To enter the user's birth date, click the *Birth Date* gadget and use the calendar to establish a date. Click **OK**.
16. Use the **Language** dropdown to choose the language this user prefers for receiving notices.
17. Click the **Addresses** tab.

The screenshot shows the 'User Registration' window with the 'Addresses' tab selected. A red callout box with the text "Scroll down to see Address 2 and Address 3" points to the scroll bar on the right side of the address list. The form shows 'Address 1' with the following fields:

- PHONE: [dropdown]
- DAYPHONE: [dropdown]
- HOMEPHONE: [dropdown]
- LINE: [dropdown]
- STREET: [dropdown]
- CITY/STATE: [dropdown]
- ZIP: [dropdown]
- EMAIL: [dropdown]
- LOCATION: [dropdown]

Buttons at the bottom: Save, Register Another User, Close.

19. Enter up to three addresses.
20. Click Address 1, Address 2, or Address 3 to select the primary address which will be used when running notice reports.
21. If the user prefers to have notices emailed, type the user's full email address in the EMAIL field.

| | | | | | |
|------------|-----------|--------------|-----------|---------------|-------------|
| Basic Info | Privilege | Demographics | Addresses | Extended Info | User groups |
|------------|-----------|--------------|-----------|---------------|-------------|

Primary: Address 1 Address 2 Address 3

Address 1

| | |
|------------|-----------------------|
| PHONE | 314-887-2937 |
| DAYPHONE | |
| HOMEPHONE | |
| LINE | |
| STREET | 12344 Olive Boulevard |
| CITY/STATE | Creve Coeur, MO |
| ZIP | 63141 |
| EMAIL | dstevens@email.com |
| LOCATION | |

Enter any other necessary information in the other tabs provided.

22. *NOTE: Refer to Appendix D to learn how to add a user to a new group or add a user to an existing group.*

Click **Save** to register the new user.

23.

A confirmation window appears. Select one of the following options:

24.

- **Register Another User** to register another user.
- **Make More Changes** to make more changes to this user registration.
- **Clone/Copy to New User** to create a new user based on the user you just created.
- **Close** to exit the wizard.

NOTE: User Photo helpers can be enabled. It allows you to load individual patron photos from an image file, capture and save photos from a webcam, or delete an existing photo. Patron photos can also be loaded in a batch. For more information on this, see the Helps for "Update User Photo Helper" and "Batch User Photo Utility."

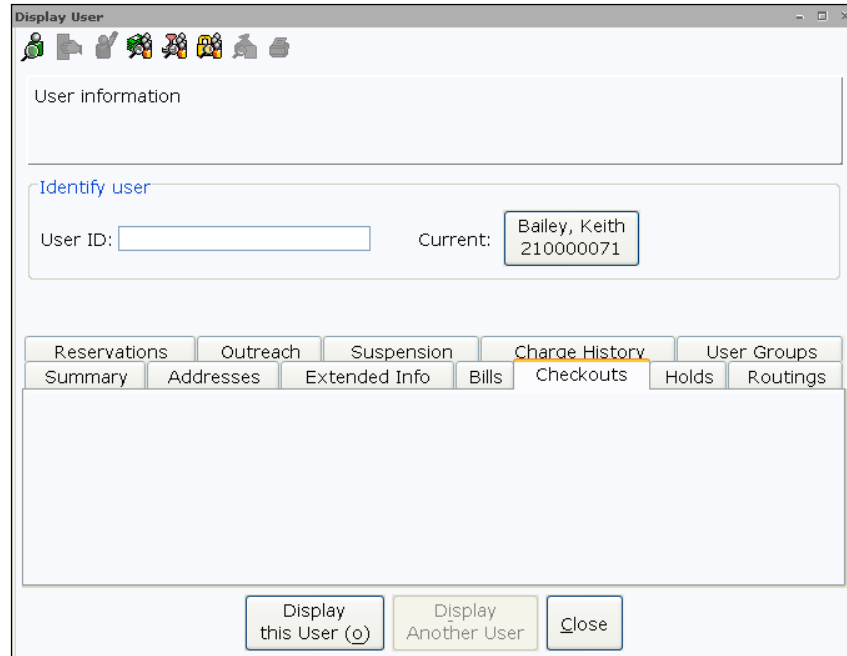
Note: Your library can attach a user signature pad to WorkFlows in order to save user signatures within the user record. This option is available through a Helper that can display on the following User wizards (User Registration, Modify User, Duplicate User). To see more information about this, you can access "User Signature" from the online Helps.

Use the *Display User* wizard to view user information such as status, checkouts, bills, holds, and extended information.

To view a user's record

Within the Users group of wizards, click the *Display User* wizard.

1.



2.

Scan the barcode from the user's card, or type the User ID and click **Display This User**.

3.

Click the **Summary** tab to see the user's activity such as status, profile, and the number of checkouts, bills, and/or holds.

| Holds | Routings | Reservations | Outreach | Suspension | Charge History | User Groups |
|-------------------------|-------------|--------------|---------------|----------------------|--------------------|-------------|
| Summary | | Addresses | | Extended Info | Bills | Checkouts |
| User key: | 204 | | | Privilege expires: | NEVER | |
| Status is: | OK | | | Group ID: | | |
| Profile name: | PUBLIC | | | Group name: | | |
| User cat1: | MALE... | | | User cat2: | ENGLISH... | |
| User cat3: | MASTERS... | | | User cat4: | | |
| User cat5: | | | | Birth date: | 10/21/1968 | |
| Library: | ARROWOOD... | | | Age: | 42 | |
| Language: | ENGLISH | | | Charge history rule: | CIRCRULE | |
| Next allowed loan date: | | | Amount owed: | none | Credit balance: | none |
| Checkouts: | none | | Unpaid bills: | none | Holds: | none |
| Extended info: | yes | | Bookings: | none | Routings: | none |
| Claims returned: | none | | Orders: | none | Distributions: | none |
| Outreach user: | no | | | | Requests/messages: | none |

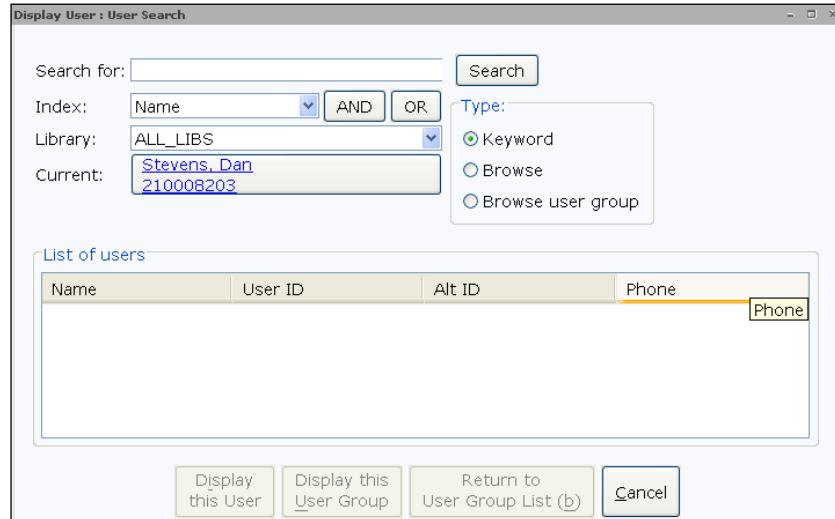
To search for a user

Click the **Display User** wizard.

Click the **User Search** helper.



- 1.
- 2.



Search for: Search

Index: Name AND OR Type: Keyword Browse Browse user group

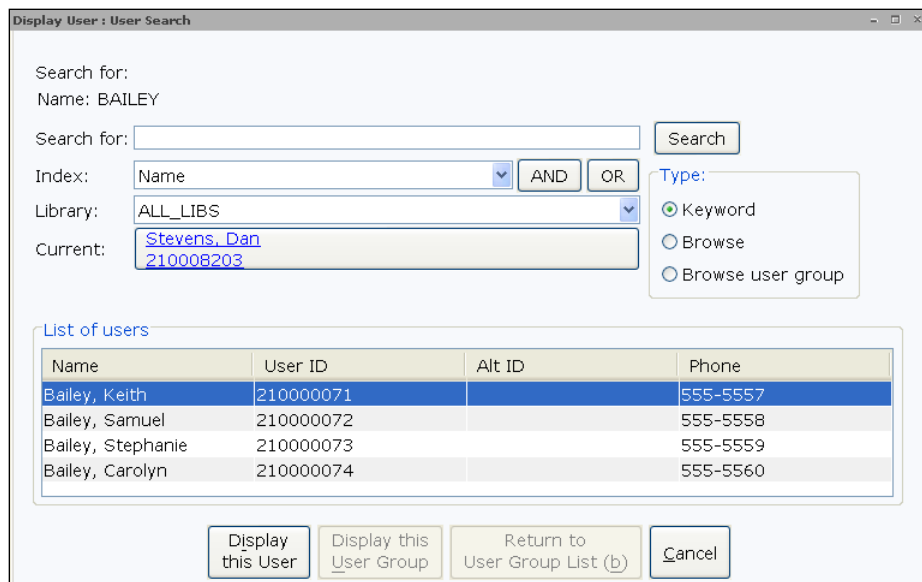
Library: ALL_LIBS

Current: Stevens, Dan
210008203

| Name | User ID | Alt ID | Phone |
|------|---------|--------|-------|
|------|---------|--------|-------|

Display this User Display this User Group Return to User Group List (b) Cancel

3. In the Search For box, type either a name or a search criterion.
4. Select a search Type using the dropdown and select the Index you want to search.
5. If necessary, use the dropdown to select a specific library.
6. Click **Search**. All records fitting the criteria you entered will display in the List of Users.



Search for: Name: BAILEY

Search for: Search

Index: Name AND OR Type: Keyword Browse Browse user group

Library: ALL_LIBS

Current: Stevens, Dan
210008203

| Name | User ID | Alt ID | Phone |
|-------------------|-----------|--------|----------|
| Bailey, Keith | 210000071 | | 555-5557 |
| Bailey, Samuel | 210000072 | | 555-5558 |
| Bailey, Stephanie | 210000073 | | 555-5559 |
| Bailey, Carolyn | 210000074 | | 555-5560 |

Display this User Display this User Group Return to User Group List (b) Cancel

Highlight a user and click **Display this User** to view the user's record.

When you are finished viewing the information, click **Close**.

Copying a User Record

The *Copy User* wizard transfers data from non-unique fields into a new user record. This wizard is useful when registering an entire family if the address information is the same.

To copy a user record

Within the Users group of wizards, click the **Copy User wizard**.

Search for the user record using one of the available indexes and select **Search**.

- 1.
- 2.

The screenshot shows the 'Copy User : User Search' window. It features a search bar at the top with a 'Search' button. Below the search bar are dropdown menus for 'Index:' (set to 'Name'), 'Library:', and 'Current:'. There are also 'AND' and 'OR' buttons. To the right, there is a 'Type:' section with radio buttons for 'Keyword' (selected), 'Browse', and 'Browse user group'. A 'List of use' section contains a table with columns 'Name', 'Alt ID', and 'Phone'. At the bottom, there are three buttons: 'Display this User Group', 'Return to User Group List', and 'Cancel'.

- 3.
- 4.

If you receive a list of users, highlight the one you want to copy and click **Clone/Copy User**. If one match is found, you are taken to the Copy User screen.

In the **Basic** tab, enter information for a new user such as first name, preferred name, and middle name. Change the Profile Name, if necessary.

Scan or type the User ID for the new user. This will replace the auto-generated User ID initially created.

5. *NOTE: If you scan a barcode, you may see a list of next steps. To continue filling in the user information, select **Make More Changes** at this point.*

Click the **Demographics** tab.

6. Add or edit existing demographics information.
- 7.

- 8.
9. Click the **Addresses** tab.

Make any necessary changes to the user's address.

Click **Save**.

Click **Clone/Copy This User to Another** to create another user record with the same information or click **Close** to exit the wizard.

10. *NOTE: System administrator can determine in wizard properties whether User ID field is auto-generated and if Extended Information should be cloned.*
- 11.

Modifying a User Record

The *Modify User wizard* is used to change an existing user record. The following wizards can also be used to modify specific user information within SirsiDynix Symphony:

- Confirm Address
- User Lost Card
- Renew User Privilege
- Bar a User

To modify a user's information

Within the Users group of wizards, click the **Modify User wizard**.

1. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for a user.

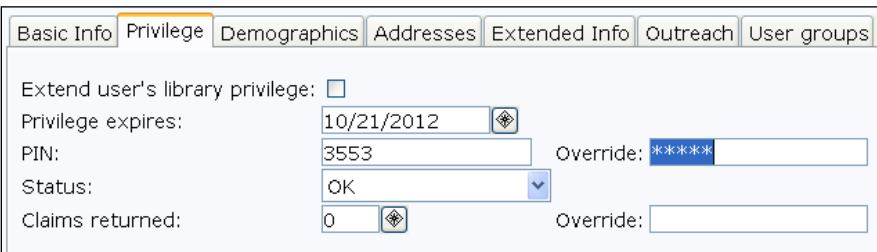
3. Within the **Basic** tab, make any necessary changes. For example, to change a User ID, scan or type in the new number.

NOTES: Staff can also mark a card lost with the User Lost Card wizard discussed later in this section.

4. *To add another active User ID, use the User ID Manager helper if available.*

5. To change the user's PIN, click the **Privilege** tab.

Type in the new PIN and enter the appropriate override.

6. 

7. *NOTE: Override codes are established and provided by the system administrator.*

8. To add or modify address information, click the **Addresses** tab and make the changes.

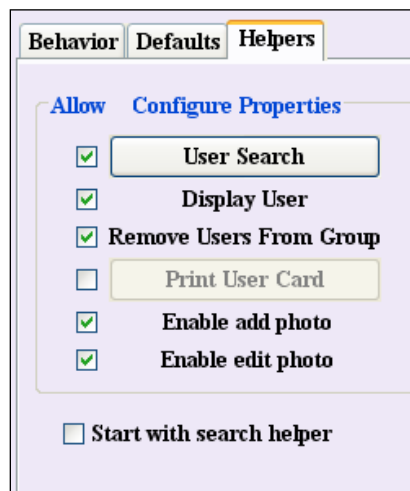
Make any other necessary changes to the user's record.

Click **Save**.

After the user record has been modified, select one of the following options:

9.
 - **Modify Another User** to modify a different user record.
 - **Make More Changes** to make more changes to this user.
 - **Close** to exit the wizard.

Note: If a library chooses to display a photo when the user's records is accessed (in the Check Out or Display User wizards, for example), two helpers can be enabled that allow you to add or edit these photos. That option appears in the property of the Modify User wizard.



Barring a User

You can prevent a user from using library services, by manually editing the user record and setting the status to BARRED.

1. **To bar a user:**
 2. Open the Users group of wizards and Click the **Modify User wizard**.
 3. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
 4. Click the **Privilege** tab.
 5. Using the **Status dropdown**, select **BARRED** from the list.
- Type in the **Override**.

Basic Info | **Privilege** | Demographics | Addresses | Extended Info | Outreach | User groups

Extend user's library privilege:

Privilege expires: NEVER

PIN: 2263 Override:

Status: BARRED

Claims returned: 0 Override: *****

An override is required to change the Status

User Information | Save (S) | Modify a Different User | Close

To inform staff of the reason for being barred, click the **Extended Info** tab and add a note.

6.

Basic Info | Privilege | Demographics | Addresses | **Extended Info** | Outreach | User groups

NOTE Patron has been barred for inappropriate use of public access computers.

COMMENT

LOSTITEM

INACTVID

ACTIVEID

7.

Click **Save**.

Confirm Address Wizard

The *Confirm Address* wizard gives quick access to a user's address information without displaying the user's complete record. Staff can display and edit address information using this wizard.

To confirm a user's address

Within the Users group of wizards, click the **Confirm Address wizard**.

1. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
- 2.

3.

Make any necessary changes to the address information and click **Confirm Address**.

NOTE: Staff can also use the Confirm Address helper within the Checkout wizard to accomplish the same task.

User Lost Card Wizard

The *User Lost Card* wizard allows staff to inactivate a user's lost card and issue a new card. WorkFlows copies the user information from the lost card to the new card. If the user has checkouts, bills, or holds, these records are transferred to the new card.

To mark a card lost

Open the Special group of wizards and click the **User Lost Card wizard**.

Search for the user's existing record.

1.

If a list of users appears, select the correct user name and click **Assign New Card**.

2.

3.

Notes

Name: Bailey, Stephanie
Id: 210000773
Group ID:
Profile name: ADULT...

Identify user

User ID: 210000773

Street: 5557 Anystreet
City, state: Spanish Fork, UT
Zip: 86668
Phone: 555-5559

Assign new ID to existing user

New user ID:

Summary | Addresses | Extended Info | Bills | Checkouts | Holds | Routings | Bookings | Reservations

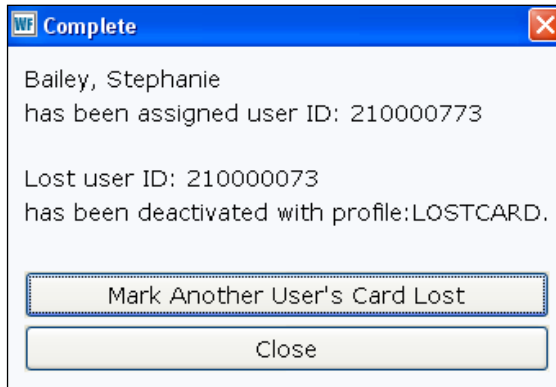
User key: 110
Status is: OK
Profile name: ADULT
User cat1: FEMALE...
User cat3:
User cat5:
Library: ARROWOOD...
Language: ENGLISH

Privilege expires: NEVER
Group ID:
Group name:
User cat2: ENGLISH...
User cat4:
Birth date: NEVER
Age: 0
Charge history rule: CIRCRUIE

Get User Information | Assign New Card (O) | Mark Another User's Card Lost | Close

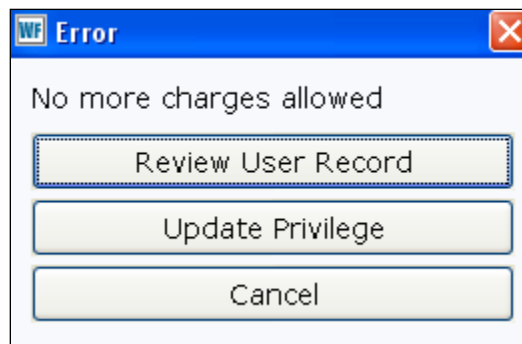
4.

Scan the barcode or type the new User ID and click **Assign New Card**.



Click **Close** to exit the wizard.

5. If someone tries to checkout materials with a deactivated card, staff will receive the following message in the *Checkout* wizard:



NOTE: If it is configured, this wizard can prompt staff to automatically create a replacement fee for the lost card. This can be set up by the system administrator.

Renew Privilege

Use the *Renew Privilege* wizard to renew user privileges when they expire or are about to expire. The *Renew Privileges* helper can be used to accomplish the same task within the *Checkout* wizard, which is the more likely place to see that a user's privilege has expired.

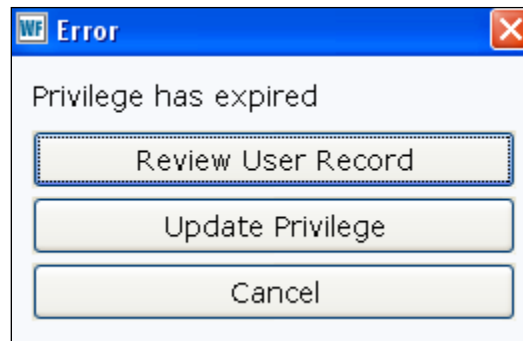


Renewing privilege renews for a full segment of time beginning with the first day of the renewal. The privilege limit is set in the user's Profile policy.

To renew a user's expired privilege during checkout

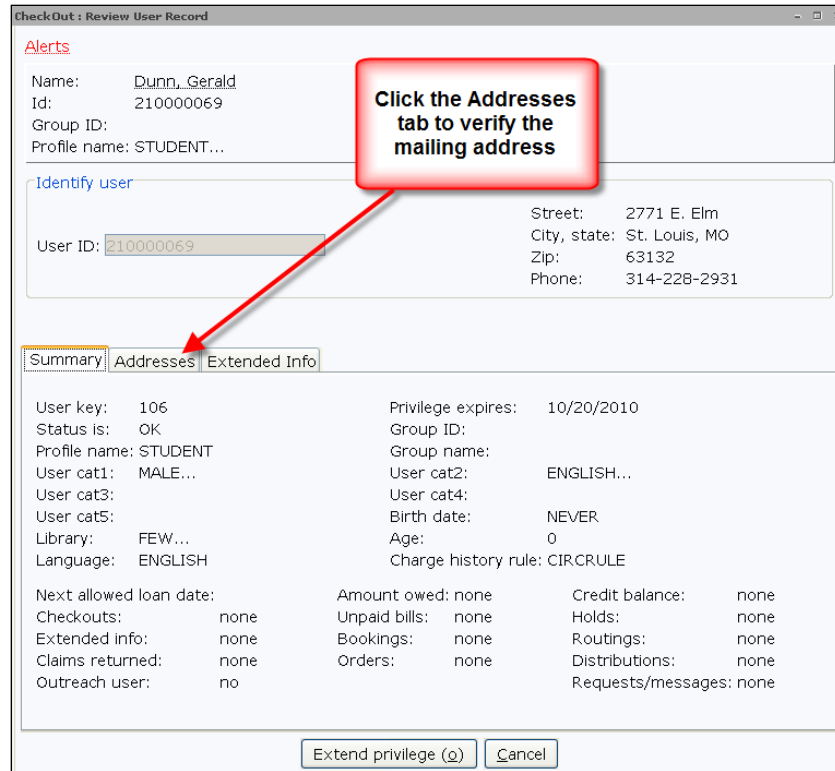
Within the Common Task group of wizards, click the *Checkout* wizard.

- 1.
2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
3. If the user's privileges have expired, staff will see the following message:



4.

To review the user's record information, click **Review User Record**.



5. Click **Extend privilege**.

*NOTE: If address information is not correct, extend the user's privilege and use the **Confirm Address** helper to make modifications.*

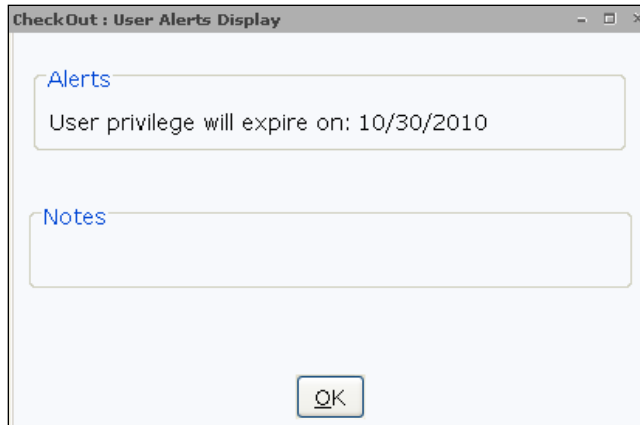
6. Proceed with checking out materials to the user.

1. **To renew a user's privilege that will expire soon**

2. Within the Common Task group of wizards, click the **Checkout wizard**.

3. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.

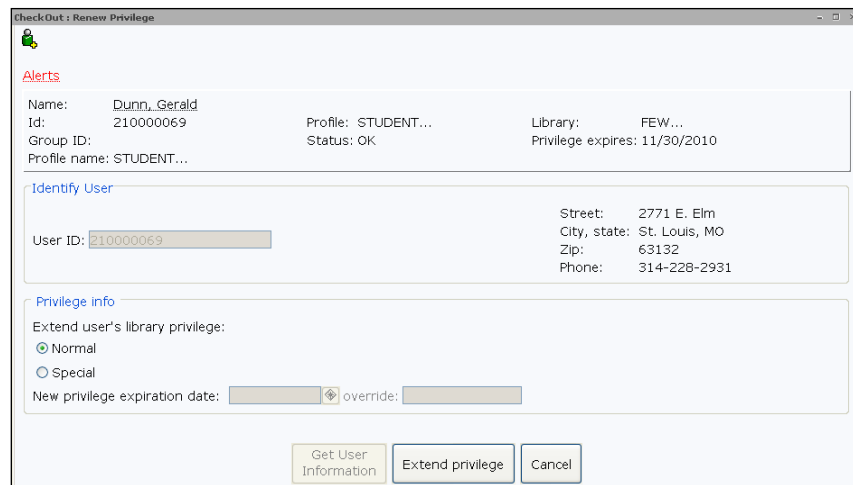
Click **OK**.



Confirm address information using the *Confirm Address* helper.

Click the **Renew Privilege** helper. 

- 4.
- 5.

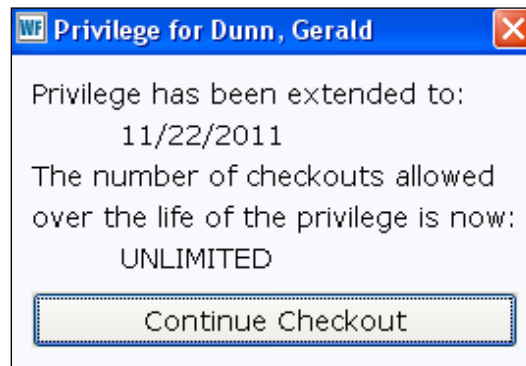


- 6.
- 7.

Click **Extend Privilege**.

Click **Continue Checkout**.

- 8.

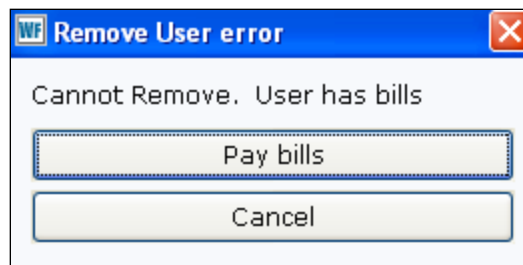
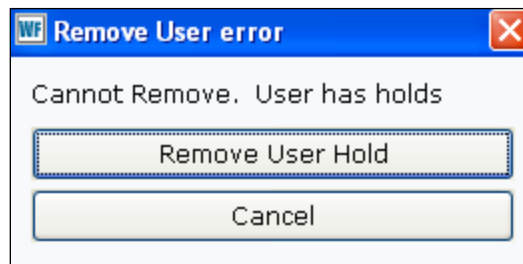
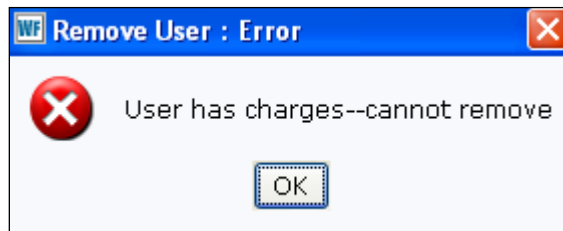


Proceed with checking out materials to the user.

Removing a User Record

Use the *Remove User* wizard to manually remove user records that are no longer needed. It is also possible to remove user records in batch with the Remove Users report.

With both methods, a user cannot be removed if the user has items currently checked out, holds, unpaid bills, unanswered requests, belongs to a profile that prevents users from being removed, or has a charge history. Within the wizard, if the record cannot be removed because of one of these conditions, an alert window will display. You must address the reason for the alert before you can remove the user record. Below are some of the messages you may receive:



1.

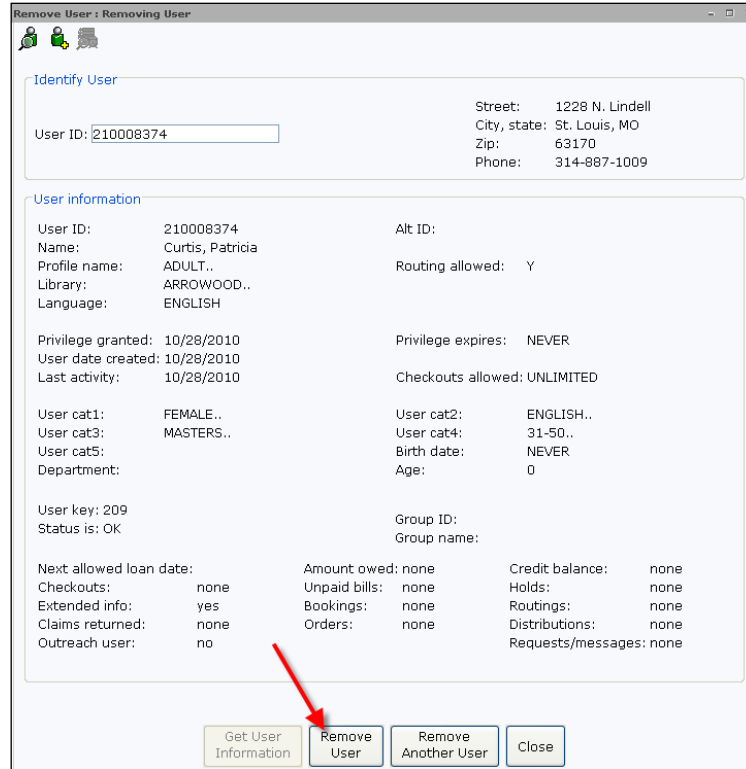
2. **To remove a user record**

3.

Within the Users group of wizards, click the *Remove User wizard*.

Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.

Review the user information and click **Remove User**.



4. Click **Remove Another User** to remove another user record or click **Close** to exit the wizard.

NOTE: For more information about removing user records, see the WorkFlows online Help file "FAQs: Removing User Records."

Check In, Out & Renew

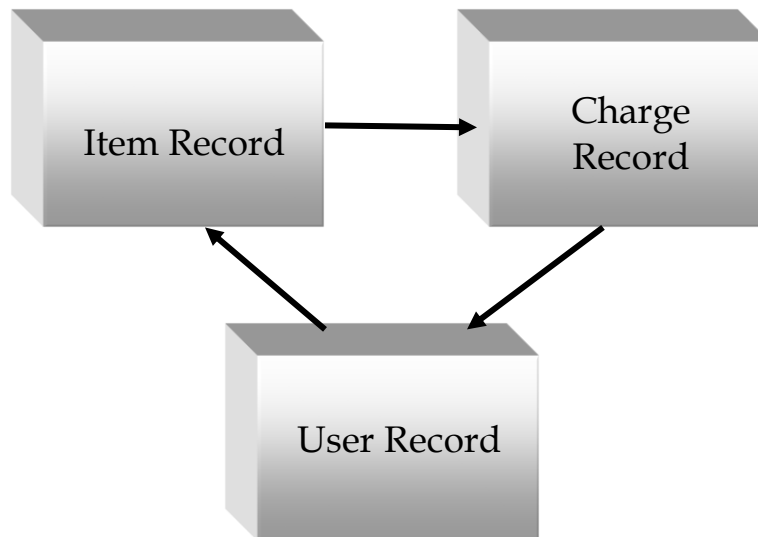
Now that you understand user records, you can begin to work with them. The most popular way to do that is checking items out to patrons and, eventually, checking them back in.

In this section you will learn to:

- Check out items
- Modify due dates before and after check out
- Renew a list of user's items or items in hand
- Check in items
- Backdate items put in the book drop

Checking Out Materials

When you check out an item to a user, WorkFlows creates a charge record to store relevant data and links the user record to the charge record. The charge record contains the item identifier, the user identifier, the date and time the item was charged, and the date and time the item is due back. It may include billing information if an item is overdue, recalled, or has associated bills.



You can manually enter the date due when the user checks out the item, or Symphony can assign due dates based on circulation rules on the item type and user profile policies. When you discharge or check in the item, WorkFlows removes the charge record from the database.

NOTES: The system can be configured to keep track of user checkouts with Charge History. The Charge History record is very similar to a charge record, and is linked to an item record and a user record only when the user checks out and later checks in the item. For more information, see the WorkFlows online Help file "FAQs: Using Charge History."

If you try to checkout items to a user with a **BLOCKED** status, you can determine the reason for the status and take actions to resolve the user's Blocked status (if desired). You can then continue with the checkout process. For more information, see the WorkFlows online Help file "FAQs: Checking Out Materials."

Standard Checkout

To check out materials

Within the Common Tasks group of wizards, click the **Checkout wizard**.

1. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
2. Scan the item barcode in the Item ID field, or type the Item ID and select the **Check Out Item to User**.
3. Continue to check out all of the items to the user.

5.

| Title | Item ID | Date Due | Billed | Amount Paid... | Type | Set... |
|-----------------------|--------------|------------------|--------|----------------|------|--------|
| Colonial house [vi... | 310700000... | 10/28/2010,23:59 | | | DVD | |
| Shaken faith : ha... | 310700004... | 11/4/2010,23:59 | | | BOOK | |

Click **Check Out To New User** to check out materials to the next user or click **Close** to exit the wizard.

NOTE: If the workstation has a receipt printer, a date due slip will print at this point if they have been configured in the wizard properties.

Applying a Special Due Date

For items that need to be checked out for a shorter or longer length of time, the *Special Due Date* helper will assist staff with this task.

To use a special due date

Click the **Checkout wizard**.

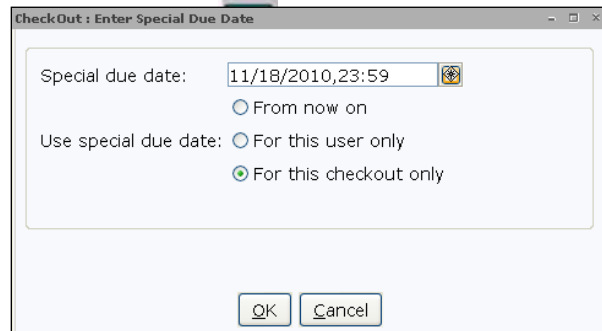
1. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
- 2.

Click the *Special Due Date* helper.

3.

Click the *Special Due Date* gadget and using the calendar select the desired due date.

4.



5.

Click **OK**.

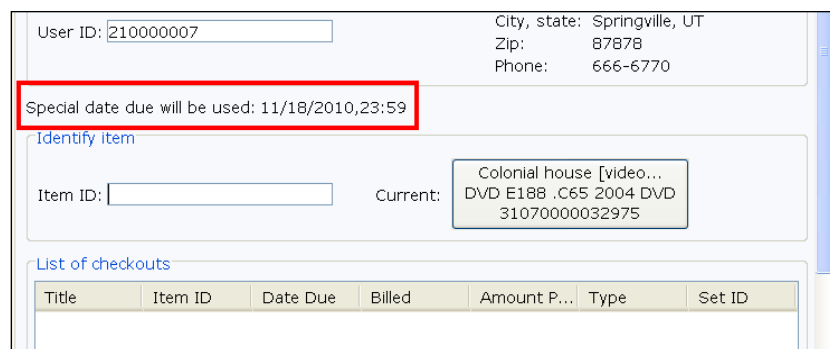
6.

Select when to use the special due date: From now on, For this user only, or For this checkout only.

7.

Click **OK**.

8.



9.

Scan the item barcode in the Item ID field, or type the Item ID and select the **Check Out Item to User**.

Click **Check Out To New User** to check out materials to the next user or click **Close** to exit the wizard.

Modifying Existing Due Dates

The *Modify Due Dates* wizard changes a due date after an item has been checked out. Unlike using *Renew User* or *Renew Item* wizard, this wizard does not affect renewal limits that might be established in the circulation policies.

To modify due dates:

Open the Special group of wizards and Click the *Modify Due Dates* wizard.

1. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
2. Select one or more of the items, or click the Select All box.
3. a. If you Select All, click the Apply Same Due Date check box.

Notes

Name: Martin, Claire
Id: 210000083
Group ID:
Profile name: STUDENT...

Identify User

User ID: 210000083

Phone: 450-654-9876
Street: 2020, rue des Yeux-Ouverts
City, state: Montréal, QC
Zip: J4Z 3P2

List of checkouts

Select All Apply Same Due Date Due date: [dropdown]

| Modify | Title | Date Due | Claims Returned |
|-------------------------------------|------------------------|------------------|-----------------|
| <input checked="" type="checkbox"/> | Shaken faith : han... | 11/4/2010,23:59 | (NEVER) |
| <input checked="" type="checkbox"/> | Colonial house [vid... | 10/28/2010,23:59 | (NEVER) |

Get User Information Modify User Due Dates Modify Another User's Due Dates Close

4. Click **Modify User Due Dates**. The new due date will not be applied until you click this button.

Click **Close**.

Renewing Materials

WorkFlows offers two ways to renew items: *Renew User* and *Renew Item*. The system assigns the new due date based on the date of actual renewal, not the original due date.

Users can also renew materials by themselves in e-Library.

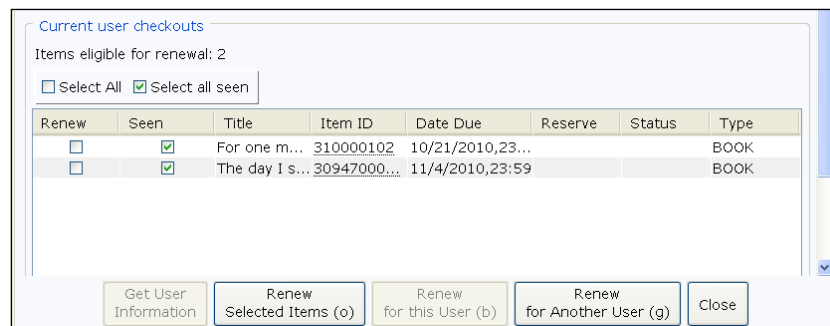
Renew User Wizard

The *Renew User* wizard can renew all or some of a user's items charged in one step. This wizard is helpful when users renew items over the phone or if they do not have the items physically present.

NOTE: If you try to renew items to a user with a BLOCKED status, you can determine the reason for the status and take actions to resolve the user's Blocked status (if desired). You can then continue with the renewal process. For more information, see the WorkFlows online Help file "FAQs: Checking Out Materials."

To renew some or all of a user's items

1. Within the Common Tasks group of wizards, click the **Renew User wizard**.
2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
3. Select one or more items to renew, or click the Select All box.

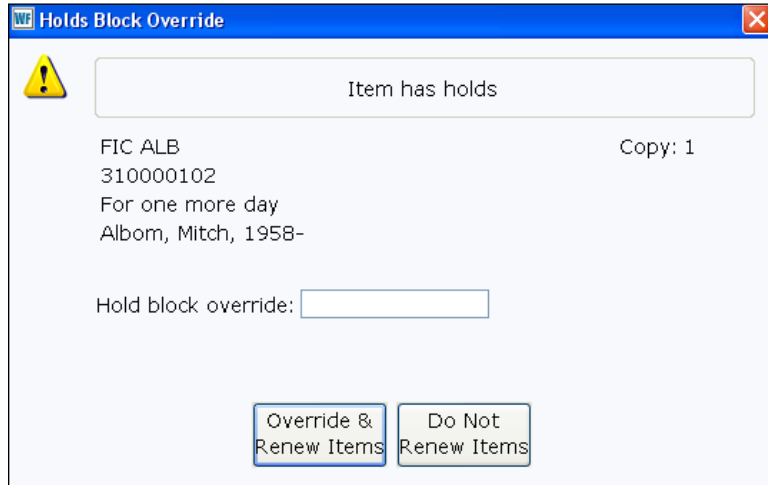


4. If you want the renewal to be recorded as a "seen" renewal (item is physically present for renewal), select the Mark Item as Seen check box, if not already selected.

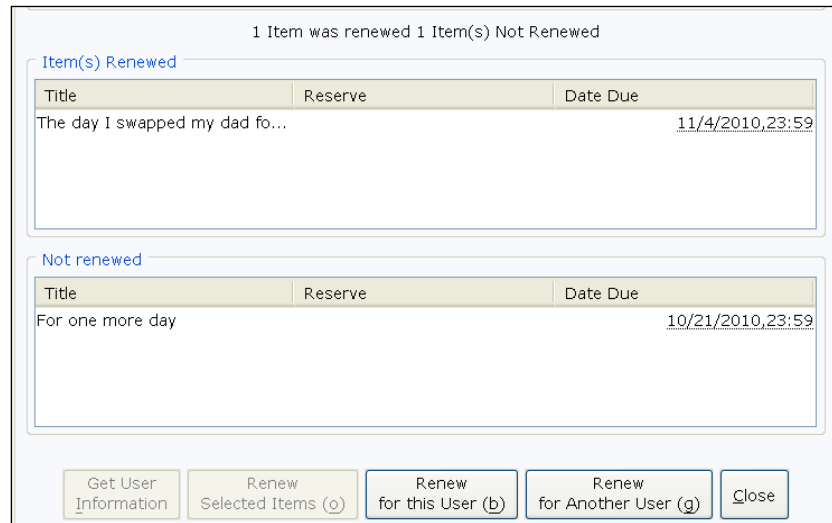
Click **Renew Selected Items**.

Note: If item(s) cannot be renewed, staff can type in an override code to allow renewal. Item(s) which are successfully renewed, will appear in

the Item(s) Renewed list Items which could not be renewed will appear in the Not renewed list.



The dialog box has a blue title bar with the text "Holds Block Override" and a close button. On the left is a yellow warning triangle icon. The main content area contains a text box with "Item has holds". Below this, the item details are listed: "FIC ALB", "310000102", "For one more day", and "Albom, Mitch, 1958-". To the right of these details is "Copy: 1". Below the details is a text input field labeled "Hold block override:". At the bottom are two buttons: "Override & Renew Items" and "Do Not Renew Items".



The dialog box has a title bar with the text "1 Item was renewed 1 Item(s) Not Renewed". It contains two sections: "Item(s) Renewed" and "Not renewed". Each section has a table with columns for "Title", "Reserve", and "Date Due".

| Title | Reserve | Date Due |
|--------------------------------|---------|-----------------|
| The day I swapped my dad fo... | | 11/4/2010,23:59 |

| Title | Reserve | Date Due |
|------------------|---------|------------------|
| For one more day | | 10/21/2010,23:59 |

At the bottom are five buttons: "Get User Information", "Renew Selected Items (o)", "Renew for this User (b)", "Renew for Another User (g)", and "Close".

6.

Click Close.

Renew Item Wizard

To renew a single checked out item

Within the Common Tasks group of wizards, click the **Renew Item wizard**.

1. If you want the renewal to be recorded as a “seen” renewal (item is physically present for renewal), select the Mark Item as Seen check box, if not already selected.
2. Scan the item barcode. The item now appears in the Item(s) Renewed list.

3.

| Title | Name | Date Due | Amount Billed | Amount Paid... |
|------------------|---------------|-----------------|---------------|----------------|
| This wide and... | Curtis, Cliff | 1/4/2011, 23:59 | | |

4.

Click **Close**.

NOTE: The Checkout wizard properties can be set to automatically renew items already checked out.

Checking In Materials

There are three ways to check in items: *Check In*, *Discharging Bookdrop* and *Fine Free Discharge*.

Check In Wizard

To discharge/check in items

Within the Common Tasks group of wizards, click the **Check In wizard**.

1. Scan the item barcode or type the item ID and click **Discharge Item**.
2. *NOTE: The system will indicate with a message whether an item should be put in transit to another library or if it should be put on the hold shelf. Click **Put Item in Transit** to send to a different location. Click **OK** to make the hold available.*

Continue to scan items until all items are checked in.

3.

| Title | Item ID | Route/Transit To | Amount Billed | Amount Paid Aut... |
|----------------------|----------------|------------------|---------------|--------------------|
| For one more day | 310000102 | HOLDS | | |
| The day I swapped... | 30947000270591 | JF | | |

4.

Click **Close**.

NOTE: System administrator can configure hold slips, hold wrappers, transit slips and/or reshelving slips within the Check In wizard.

Discharging Bookdrop Wizard

Use the *Discharging Bookdrop* wizard to check in items left in the book drop and backdate the discharge (check in) date. This is helpful when users return items after hours. It also can be used when the library closes for unexpected reasons and due dates were assigned on the days it was closed.

To backdate items when checking in:

Open the Special group of wizards; and click the **Discharging Bookdrop wizard**.

Click the **Date gadget**, to select an appropriate date.

1.

Scan the item barcode or type the item ID and click **Discharge Item**.

2.

3.

| Title | Item ID | Route/Transit To | Amount Billed | Amount Paid Au... |
|-----------------------|-----------|------------------|---------------|-------------------|
| Belles roses -- be... | 310002127 | NF | | |

4.

Continue to scan items until all items are checked in.

5.

Note: If the item was claimed returned, you can enable a popup that alerts you and allows you to choose to edit the user's record.

6.

Alert: Item Claimed Returned

A user claims to have returned this item.
User Name: VanCott, Linda
Date of claimed return: 4/10/2013

Open the user record for editing

Discharge Cancel

Click **Close**.

NOTE: System administrator can configure hold slips, hold wrappers, transit slips and/or reshelving slips within the Discharging Bookdrop wizard.

Fine Free Discharge Wizard

The Fine Free Discharge wizard is used for amnesty days, in which all items checked in through it will have no fines assessed.

To check in items for which you do not want to collect fines

Within the Common Tasks group of wizards, click the **Fine Free Discharge wizard**.

1.

| Title | Item ID | Route/Transit To |
|-------|---------|------------------|
|-------|---------|------------------|

2. Scan the item barcode or type the item ID and click **Discharge Item**.
3. Continue to scan items until all items are checked in.
4. Click **Close**.

Fines, Bills & Payments

Your library may ask users to pay for services such as photocopying, printing, computer time, or equipment rental. Some libraries may also bill for library cards, for checking out materials, or placing and filling hold requests. Bills that are not associated with items (e.g. printing, photocopying) are referred to as 'fees.' Bills associated with overdue items are referred to as 'fines.'

A bill record contains a fixed amount that the user owes the library. It also contains the reason, associated title, date billed, item due date, and other pertinent information.

Note: You can also use the RFID capability to checkout multiple items—using the Cache feature of the CHECKOUT wizard properties in the Behavior tab.

SirsiDynix Symphony creates bills automatically based on library policies. Staff may also create bills manually using the *Billing a User* wizard. You can view bills from the user record, or if the bill is associated with an item, by displaying the item's record.

In this section you will learn to:

- Create a bill manually
- View user bills (paid as well as unpaid)
- Pay bills
- Handle damaged material
- Suspend and unsuspend users

Billing a User

The Billing a User wizard is used when staff must manually create a bill.

To create a bill

Within the Common Tasks group of wizards, click the **Billing a User wizard**.

1. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
2. Using the dropdown, select a reason for the bill.
3. In the Amount field, type in the amount using the XX.XX format. The currency sign is not necessary.
- 4.

The screenshot displays the 'Billing a User' wizard interface. At the top, it shows the user's information: 'User ID: 8012235677', 'Smith, Larissa', and 'Profile name: ADULT2...'. Below this is the 'Identify User' section with a text input field containing 'User ID: 8012235677'. The 'Enter Item & Bill Information' section contains several fields: 'Reason for bill:' with a dropdown menu set to 'Damaged material'; 'Amount:' with a text input field containing '15.00'; 'Item ID:' with a text input field containing 'C304353071'; 'Note:' with a text input field containing 'User was thrown into a pool'; and 'Payment type:' with a dropdown menu set to 'Paid with currency'.

5. If you are creating a bill that pertains to a specific item, scan the item barcode or type in the item ID. You can also use the *Item Search* helper to identify the item to be used for the bill.
- 6.
7. You may also add a note to the bill which can be displayed in other wizards and glossaries that reference this bill.
8. If the user is going to pay the entire bill now, select a Payment Type using the dropdown.
- 9.

Click **Pay Now** to pay the bill in full, or click **Bill User** to add the bill to the user's account.

Click **Bill Another User** to bill a different user or click **Close** to exit the wizard.

Viewing Bill History

A bill record, when attached to an item, can be viewed in the user record or the item record.

To view bills in the user record

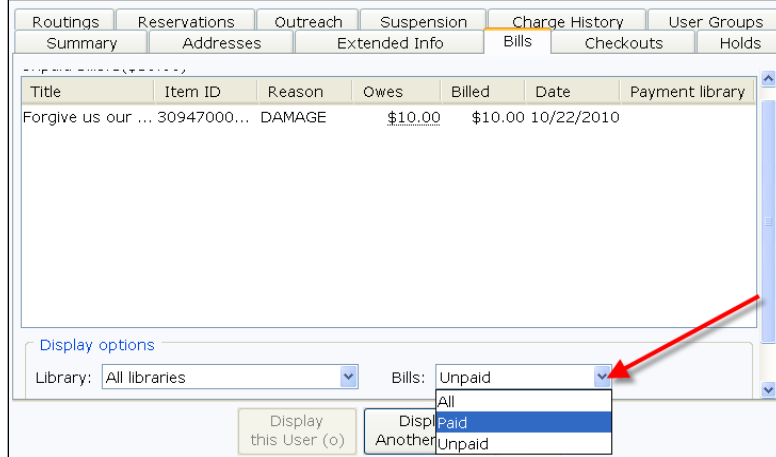
Open the Users group of wizards; and click the **Display User wizard**.

1. Scan or type the user's barcode. You can also use the *User Search* helper to search for the user.

2. Click the **Bills** tab to display a list of unpaid bills.

To view paid bills, use the **Bills dropdown**.

3. Select **Paid**.

4. 

5.

| Title | Item ID | Reason | Owes | Billed | Date | Payment library |
|--------------------|-------------|--------|---------|---------|------------|-----------------|
| Forgive us our ... | 30947000... | DAMAGE | \$10.00 | \$10.00 | 10/22/2010 | |

6.

| | | | |
|------------------------|--|------------------------|--|
| Library: All libraries | | Bills: Unpaid | |
| Display this User (o) | | Display Another Unpaid | |

To view detailed information about the paid bill, click the **glossary in the Owes column**.

Paid bills: 2(\$0.00)

| Title | Item ID | Reason | Owes | Billed | Date | Payment library |
|--------------------|------------|-----------|--------|---------|------------|-----------------|
| | | PRIVILEGE | \$0.00 | \$25.00 | 10/22/2... | ARROWOOD |
| History of West... | 97162-1001 | ILL | \$0.00 | \$2.50 | 10/22/2... | ARROWOOD |



Click **Close** to exit the wizard.

7. **To view bills in the item record**

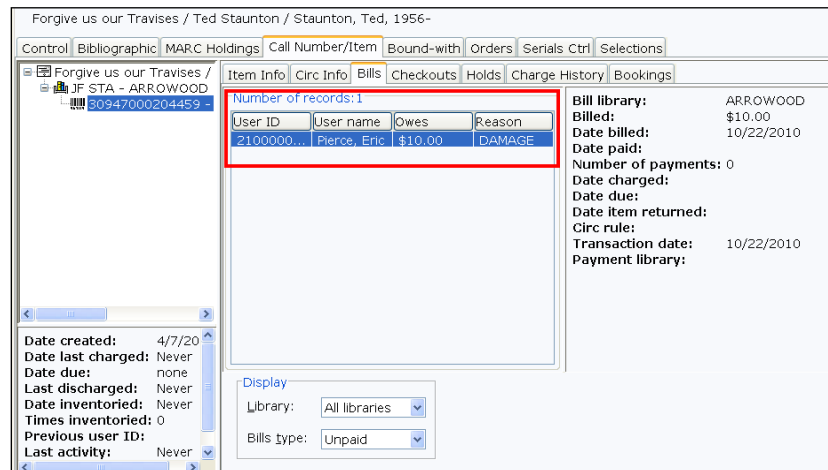
1. Within the Common Tasks group of wizards, click the **Item Search and Display wizard**.

2. Type in your search terms, change Index and Type, as desired, and click **Search**.

3. If you receive a hit list, highlight the record you want to display and click **Detailed Display**.

4. If it does not immediately display, click the **Call Number/Item tab**.

5. Click the **Bills tab**.



6. Click **Close**.

Paying Bills

The *Paying Bills* wizard is used to accept payments for a user's current bills. You can apply payments for each individual bill or for the total amount owed, from the oldest bill to the most recent.

NOTE: Overdue fines are not recorded in bills until the items have been checked in with the Check In or Discharging Bookdrop wizards

Paying All Bills

To pay a user's entire bill

Within the Common Tasks group of wizards, click the **Paying Bills wizard**.

1.

| Title | Item ID | Reason | Owes | Payment Type | Paym... | Change | Billed | Date |
|-------|---------|--------|------|--------------|---------|--------|--------|------|
|-------|---------|--------|------|--------------|---------|--------|--------|------|

2.

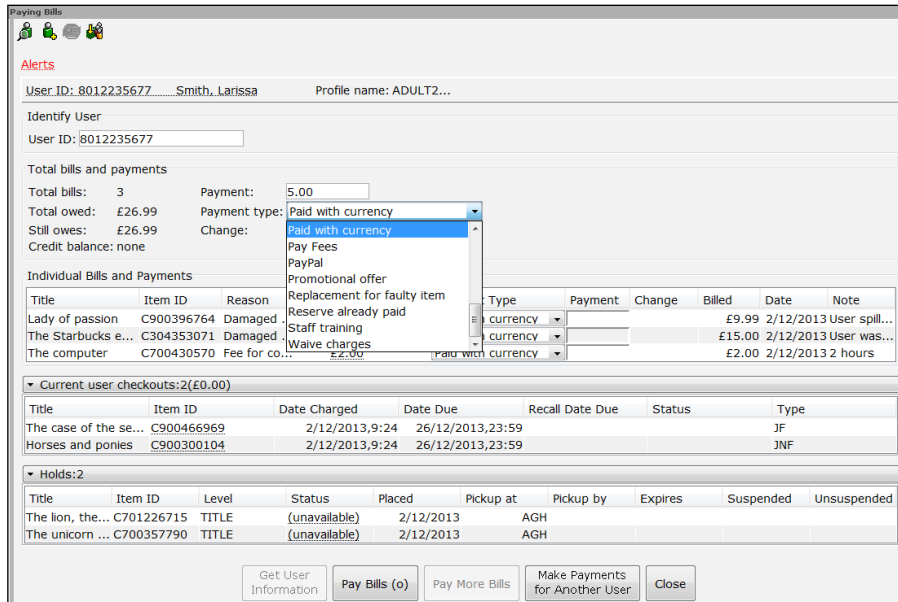
3.

Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.

4.

To apply a payment to the total amount owed, type the amount into the Payment field using the XX.XX format. The currency sign is not required.

Using the dropdown, select the **Payment Type**.

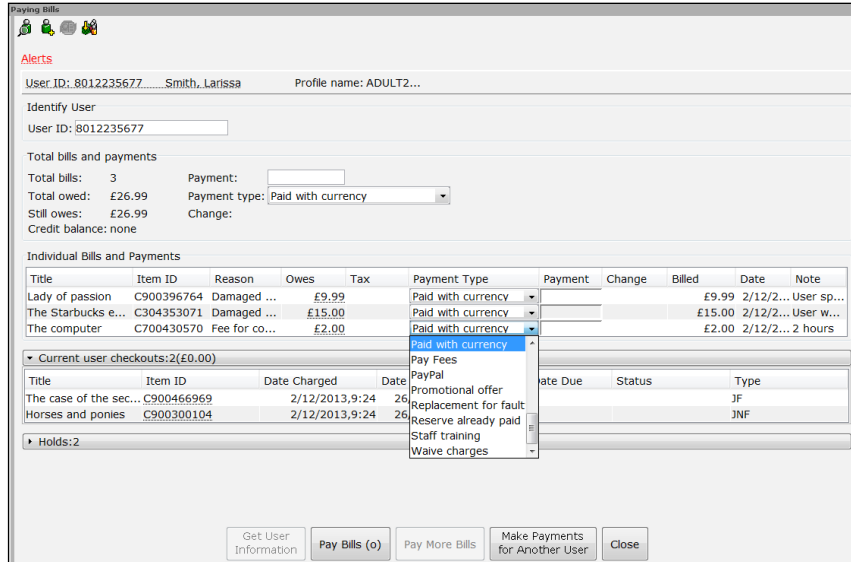


NOTE: Payment types of CANCEL and FORGIVEN can be used to waive bills.

5. Click **Pay Bills**. If the user overpays, the system automatically calculates the difference in the change field.
6. After the bill has been paid, select one of the following options:
 - **Pay More Bills** to continue making payments for this user.
 - **Make Payments for Another User** to accept payments from another user.
 - **Close** to exit the wizard.

NOTE: To pay bills for group members, use the Pay User Group Bills helper.

1. **To pay an individual bill:**
2. Within the Common Tasks group of wizards, click the **Paying Bills wizard**.
3. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
4. In the **Individual Bills and Payments list** (lower section of screen), type the amount in the Payment box next to each specific item using the XX.XX format. The currency sign is not required.
Using the dropdown, select the **Payment Type**.



Click Pay Bills.

5. After the bill has been paid, select one of the following options:
6.
 - **Pay More Bills** to continue making payments for this user.
 - **Make Payments for Another User** to accept payments from another user.
 - **Close** to exit the wizard.

Discharging a Damaged Item

If staff identifies an item that has already been checked in but has been returned damaged, it is possible to charge the user a bill for damage. The system will provide the information of the previous user and the cost of the item.

If the damage is discovered within the *Check In* wizard and if the properties of the wizard are set to display user information, staff can identify the previous user in the wizard.

The screenshot shows the 'Discharging : Identify Item' window. A red box highlights the user information: Name: Bailey, Carolyn; Id: 210000074; Group ID; Profile name: STUDENT... A red arrow points from the 'Id' field to the 'Item ID' field in the 'Identify item' section. Below this is a table titled 'List of discharges' with columns: Title, Item ID, Route/Transit To, Amount Billed, and Amount Paid A... The first row is highlighted in blue.

| Title | Item ID | Route/Transit To | Amount Billed | Amount Paid A... |
|----------------------|----------------|------------------|---------------|------------------|
| The watchman :... | 310000041 | FIC | | |
| I face the wind | 31070000016010 | STACKS | | |
| No child left beh... | 31070000034666 | STACKS | | |
| The language of... | 310000214 | NF | | |

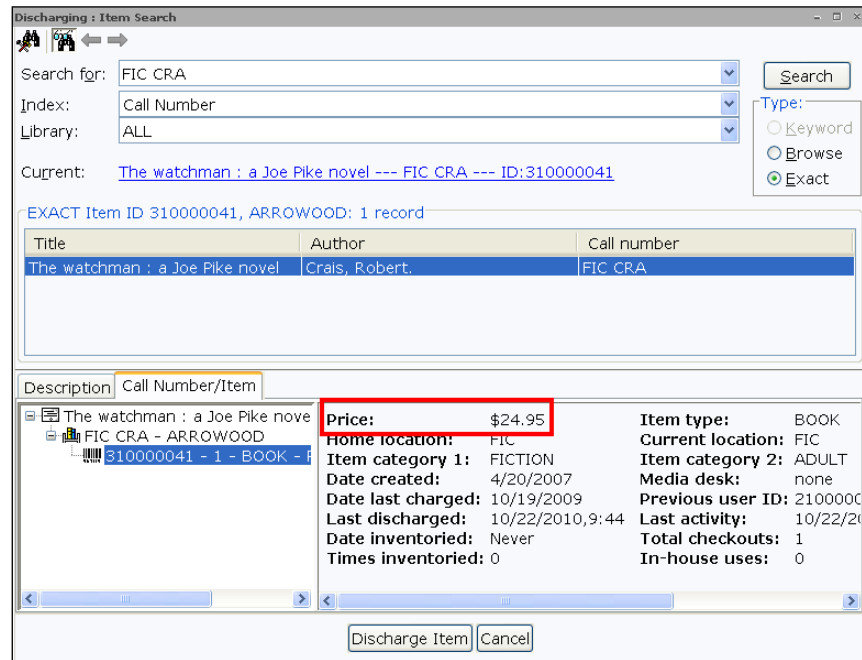
Buttons at the bottom: Discharge Item (o), Clear Discharge List, Close.

The screenshot shows the 'Discharging : Identify Item' window. A red box highlights the user information: Name: Arnold, Timothy; Id: 210000025; Group ID; Profile name: ADULT... A red arrow points from the 'Id' field to the 'Item ID' field in the 'Identify item' section. Below this is a table titled 'List of discharges' with columns: Title, Item ID, Route/Transit To, Amount Billed, and Amount Paid A... The third row is highlighted in blue.

| Title | Item ID | Route/Transit To | Amount Billed | Amount Paid A... |
|----------------------|----------------|------------------|---------------|------------------|
| The watchman :... | 310000041 | FIC | | |
| I face the wind | 31070000016010 | STACKS | | |
| No child left beh... | 31070000034666 | STACKS | | |
| The language of... | 310000214 | NF | | |

Buttons at the bottom: Discharge Item (o), Clear Discharge List, Close.

You can locate the price of the item by clicking the *Item Search* helper and click the Current option.

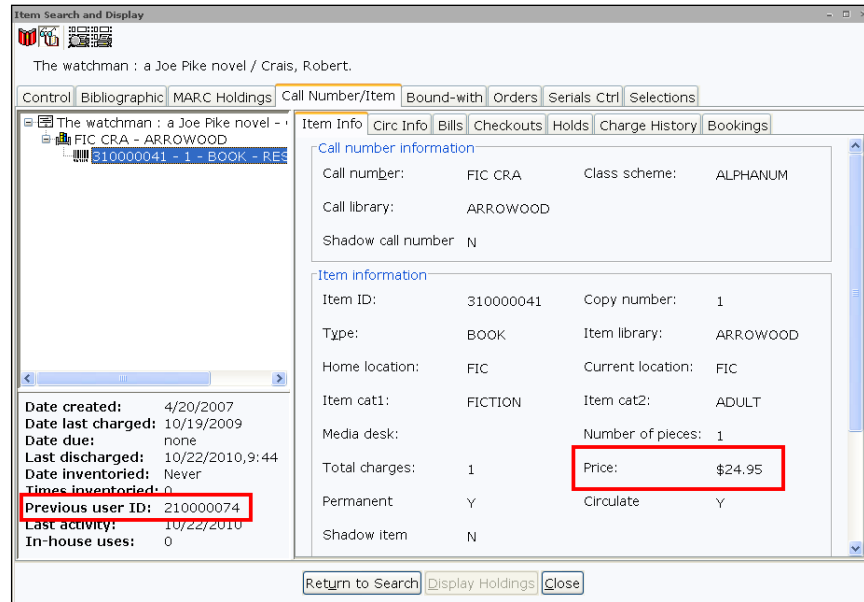


If the damage is discovered after the *Check In* wizard is closed or if the list of discharges has been cleared, the *Item Search and Display* wizard can be used to find the previous user ID.

To locate the previous user ID and price of the item

1. Within the Common Tasks group of wizards, click the **Item Search and Display wizard**.
2. Scan the item’s barcode or type in the item ID and click **Search**.
3. If it does not immediately display, click the **Call Number/Item** tab.

In this screen, look to the item Price field and the Previous User ID information at the left.



Date created: 4/20/2007
Date last charged: 10/19/2009
Date due: none
Last discharged: 10/22/2010,9:44
Date inventoried: Never
Times inventoried: 0
Previous user ID: 210000074
Last activity: 10/22/2010
In-house uses: 0

- 5.
- 6.

Click **Close** to exit the wizard.

At this point, you can follow the steps given above under Billing a User to create a bill for DAMAGE.

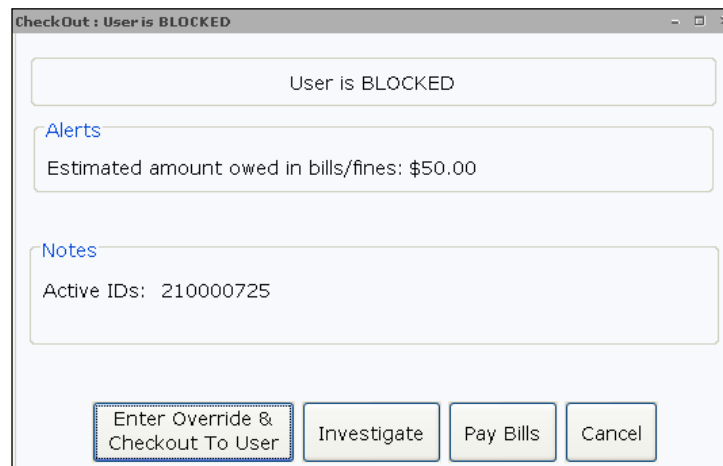
User Statuses

Every user in the system has a status. There are four user status settings:

OK - User has full library privileges as defined in the policy file. The user is in good standing and has no overdue items or bills.

DELINQUENT - User has unpaid bills or overdue items under the thresholds setup in circulation policies. The user can still check out items and have all other privileges of OK users, but the workstation operator will be warned that the user is delinquent.

BLOCKED - User has unpaid bills or number of overdue items over the thresholds setup in circulation policies. The user can check out items only if an override code is supplied.



CheckOut : User is BLOCKED

User is BLOCKED

Alerts

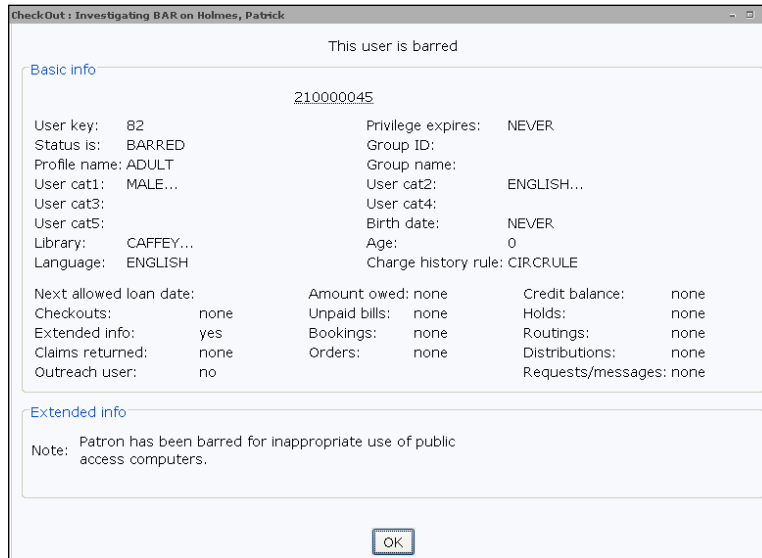
Estimated amount owed in bills/finer: \$50.00

Notes

Active IDs: 210000725

Enter Override & Checkout To User Investigate Pay Bills Cancel

BARRED - The user cannot check out items. The BARRED status must be added and removed manually by a workstation operator with assigned override code before the user can check out items.



NOTE: SirsiDynix Symphony allows for the creation of custom statuses. These can be created by the system administrator.

Suspending and Unsuspending Users

Some libraries prefer to suspend a user's loan privileges when overdue materials are returned rather than assess overdue fines. Policies can be set up to automatically suspend a user for a specific period of time when materials are returned. Staff members can use the *Suspend User* wizard to manually suspend a user's loan privileges for a specific number of days or until a selected date. This will prevent the user from checking out additional materials and placing holds, but they can still pay fines, return items, and renew items.

Once the suspension range has passed, the user will be able to resume circulation activity. Staff can also waive the suspension by a particular number of days or completely using the *Unsuspend User* wizard.

Suspend User Wizard

The Suspend User wizard is used to suspend a user's privileges.

To suspend a user:

1. Open the Users group of wizards and click the ***Suspend User wizard***.
2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
3. Using the dropdown, select a reason for the suspension.
4. In the **Suspend for Number of Days** field, type in the number of days to suspend the user.
- 5.

If the suspension is associated with an item, scan the item barcode or type in the item ID. You can also use the *Item Search* helper to search for the item.

6. Click **Suspend User**.

NOTE: Depending on the wizard behavior settings, you may be asked to enter a specific date rather than a number of days.

7. Click **Close**.

When staff tries to check out items to a suspended user, the following message will appear:

Unsuspend User Wizard

Using the *Unsuspend User* wizard, staff can unsuspend individual suspended users. You can do this by issuing an unsuspend suspension record for the suspension amount of an individual record or for all suspended records.

To unsuspend a user

Within the Users group of wizards, click the **Unsuspend User wizard**.

1. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.

2.

| Item ID | Title | Date Cr... | Suspen... | Suspen... | Linked... | Next Allowed... | Library | Reason |
|---------|-------|-------------|--------------|-----------|-----------|------------------|---------|--------|
| | | 10/25/20... | Suspension 6 | | 0 | 10/26/2010,8:... | ARRO... | MISC |
| | | 10/25/20... | Suspension 7 | | 0 | 10/27/2010,8:... | ARRO... | MISC |

3.

4.

Using the dropdown, select a **Reason for unsuspension**.

In the Unsuspend for Number of Days field, type the number of days.

5.

NOTE: Depending on the wizard behavior settings, you may be asked to enter a specific date rather than a number of days.

6.

7.

To identify a specific suspension record for this user, select a Suspension key from the dropdown list.

Click **Unsuspend User**.

Click **Close**.

Hold

In this section we will discuss how to place holds within Symphony WorkFlows. You will also learn how to modify and remove holds, as well as deal with on shelf holds, blanket holds, and recalls.

In this section you will learn to:

- Place a hold in WorkFlows
- Place a hold in the online catalog
- Display a hold
- Modify an existing hold
- Reorder a hold queue
- Trap holds for on-shelf items
- Remove a hold
- Work with a recalled item
- Place a blanket hold

When a user requests an item that is currently checked out, or when a library department needs an item for binding, mending, reclassification, or reserve collection purposes, you will need to place a hold. When you place a hold, Symphony creates a hold record that links the item and the user.

Hold records contain the following information about the item;

- User who placed the hold
- Library where the hold was placed
- Pickup library (at multi-library sites)
- Date and time the hold was placed
- Hold level and range

When more than one user places a hold on an item, Symphony creates a hold list (queue). Any number of users can wait in the hold queue. SirsiDynix Symphony uses information in hold records, hold policies, item policies, and user profile policies to determine which user in the hold queue receives the item when it becomes available.

A hold can also be a recall. That is, the patron who has the item checked out must return the item before the original due date.

Place Hold Wizard

The *Place Hold* wizard allows staff to place holds on library materials.

NOTE: If you try to place holds for a user with a BLOCKED status, you can determine the reason for the status and take actions to resolve the user's blocked status (if desired). You can then continue with the Place Hold process. For more information see the WorkFlows online Help file "FAQs: Placing Holds."

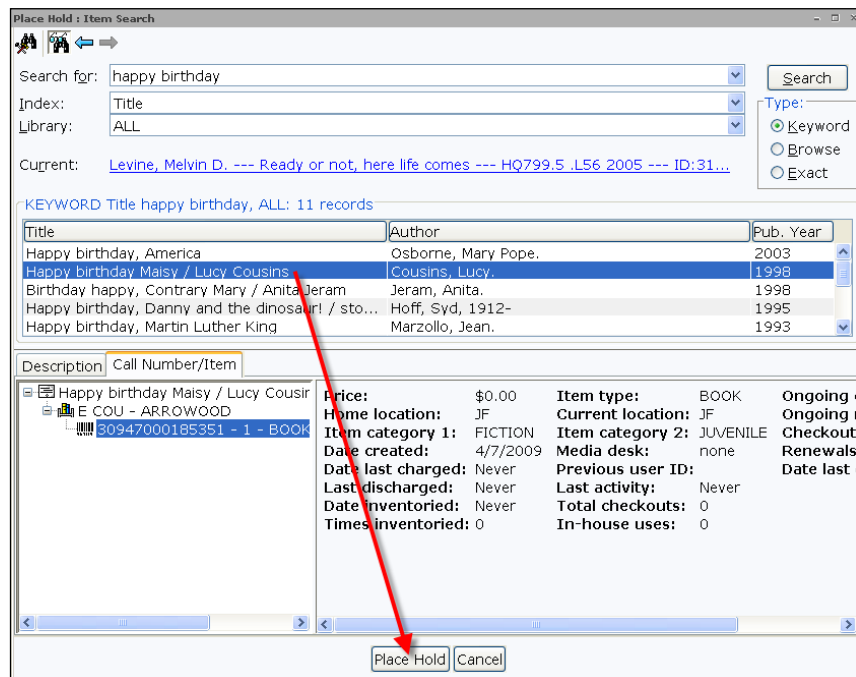
To place a hold in WorkFlows

Open the Holds group of wizards and click the **Place Hold wizard**.

1. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
- 2.

3. If you do not have an item ID, click the *Item Search* helper and search for the item. If more than one title appears in the list, highlight the relevant title and click **Place Hold**.

- 4.



If necessary, change the pickup location with the Pickup At dropdown.

If necessary, type in any important information regarding the hold being placed. This information will appear when viewing the hold record, and at check-in.

5. If the user is going on vacation and they want to prevent the hold from being filled for a specific period of time, use the *Date Suspended* to select the effective date. Use the *Date Unsuspended* gadget to select the date the user wants to be “restored” in the hold queue.
6. During the suspension, the user will not lose his place in the queue.

7. To make the hold first in the queue, click the box next to Make Hold First in Queue. This may not display depending on the wizard behavior properties.

8. If the Reserve Hold check box displays and you select this box, the hold can be filled with a reserve item or a non-reserve item. If you clear this check box, the hold cannot be filled with a reserve item. The Reserve Hold check box displays only if the wizard behavior properties for this option is selected by the system administrator.

9.

10.

The screenshot shows the 'Place Hold' wizard interface. A red callout box with the text "To place a hold, identify the user, the item and click Place Hold" has two red arrows pointing to the 'User ID' and 'Item ID' input fields. The interface includes sections for 'Notes', 'Identify User', 'Identify Item', 'Hold Info', and 'Level/Range'.

Notes

Name: Lambert, Sonia
Id: 210000091
Group ID:
Profile name: ADULT...

Happy_birthday_Maisy / Lucy_Cousins / Cousins, Lucy.
E.COU_Copy:1 ID:30947000185351

Identify User

User ID: 210000091

Street: 3700, place des Grands Magasins
City, state: Montréal, QC
Zip: J4Z 3P2
Phone: 450-345-6789

Identify Item

Item ID: 30947000185351

Hold Info

Pickup at: ARROWOOD Expires: 4/23/2011
Comments:
Date suspended: Date unsuspended:

Level/Range

Level: Copy Title
Range: Library Group System

Recall status

Allow Recall No Recall Recall now (RUSH)

Make hold first in queue Reserve hold

Get User Information Get Item Information (b) Place Hold Place Hold for Another User (g) Close

Click Place Hold.

After the hold has been placed, select one of the following options:

- **Place Hold for Another User** to place a hold for another user.
- **Place Another Hold for This User** to place another hold for this user.
- **Remove This Hold** to remove the hold you just placed.
- **Modify This Hold** to make changes to this hold.
- **Close** to exit the wizard.

Record Ranges

You can place holds across a collection of item records. This collection of item records is called a record range. There are three types of record ranges: System, Group, and Library.

The range only applies to Title level holds. Range types are not used on Copy level holds because a Copy level hold is placed on a specific copy of a title.

System Range – The System range applies the Title level hold across all copies in the system that are eligible to fill the hold. If no qualified copies exist for the title, WorkFlows prompts you for an override code to place the hold on copies that would otherwise be considered ineligible.

Group Range – The Group range applies a Title level hold across all libraries listed in an attribute of the station operator’s Library policy. Systems may group libraries by library type (academic, school, public, etc.) or by region. The hold is satisfied by a copy from the group of libraries to which login’s station library belongs.

Library Range – The Library range applies a Title level hold on copies available in the item’s library.

Placing a Recall Hold

Some libraries –particularly academic libraries –will issue recalls on checked out material. A recall requests the return of the item(s) before their due date.

NOTE: For libraries that do not allow recall holds to be placed, the properties of the wizard can be configured to remove the Recall Status area of the Place Hold wizard.

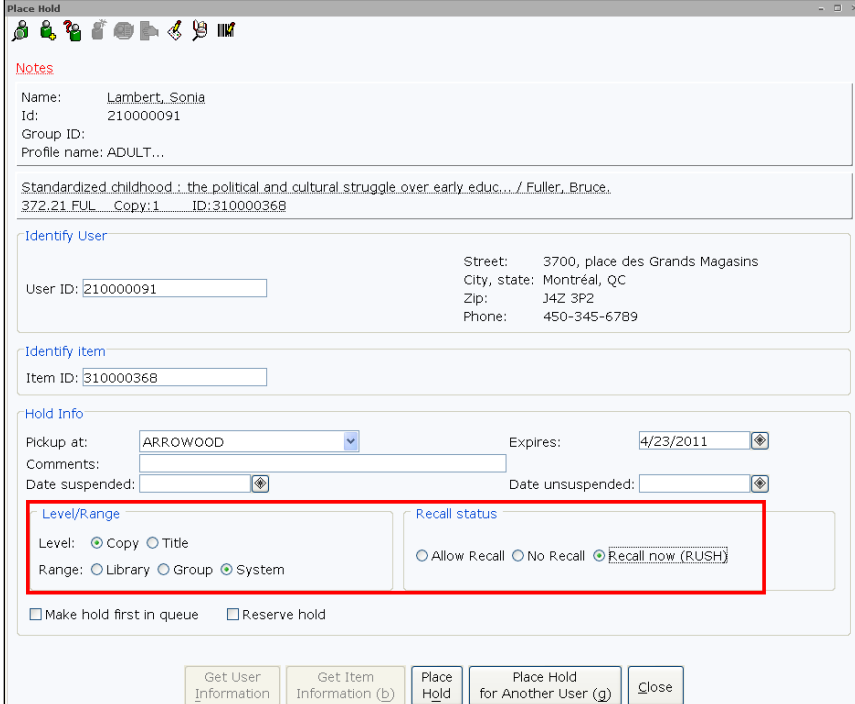
To place a recall hold

Open the Holds group of wizards and click the **Place Hold wizard**.

1. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
- 2.

3. If you do not have an item ID, click the *Item Search* helper and search for the item. If more than one title appears in the list, highlight it in the list and click **Place Hold**.

4. Click **Copy** for the Level.

5. 

Select either Allow Recall or Recall Now (RUSH).

Allow Recall specifies that if the current user has had the item at least as long as the recall loan period specifies, even if the item is not due yet, the item can be recalled.

Recall Now (RUSH) specifies that the current user's charge due date is to be changed to the current date.

NOTE: If recalls are placed on materials, you will want to schedule the Recall Notice report to run periodically. The report generates notices requesting the return of charged items.

Placing a Blanket Hold

The *Place Blanket Hold* wizard can be used to place a single hold on multiple titles or items, It requires a specified number of items be available before the hold is considered filled.

This wizard is particularly useful to place a hold on a title available in different formats (book, paperback, large print, book on CD, etc.). It can also be used to place holds on items of a particular subject. For example, if a student needs to write a paper on the 'Renaissance art' and he needs five sources on the subject, staff can place holds on a range of titles. If staff places a blanket hold on 10 different titles, the first five titles that become available will fill the hold. The other five titles holds will be removed automatically.

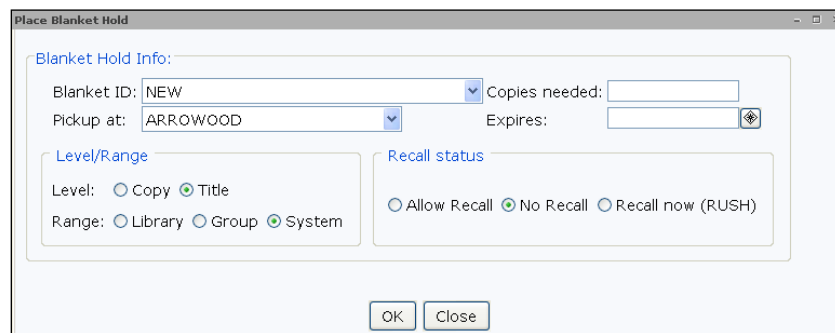
To place a blanket hold

Within the Holds group of wizards, click the **Place Blanket Hold wizard**.

1.

Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.

2.



3.

4.

In the Copies Needed field, type the number of items (1 to 50) that must be available for the blanket hold to be considered filled.

5.

If necessary, change the pickup library using the Pickup At dropdown.

6.

7.

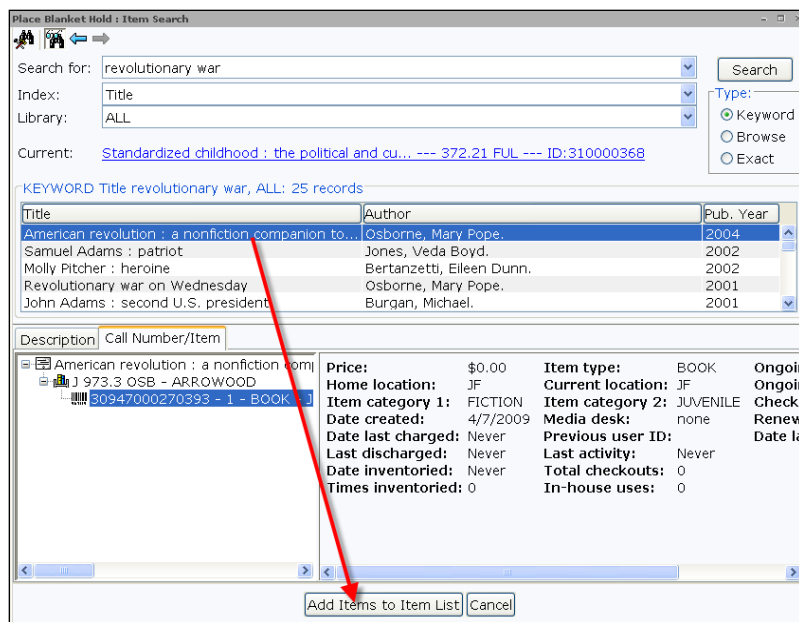
Click on the *Expires* gadget and select an expiration date for the blanket hold. This is a required field.

8.

Make any other necessary selections and click **OK**.

Click the *Item Search* helper and search for the title or subject to be placed on hold.

Highlight a title and click **Add Items to Item List**.



Click **Add to List**.

9. A list will begin to form at the bottom of the Place Blanket Hold screen.

10. Click the *Item Search* helper again and select another title and repeat steps 8 and 9 to add more titles to the list.

11. Click **Place Blanket Hold**.

12. A confirmation screen will appear letting you know how many blanket holds were placed.

13.

Click **Close**.

Below is how a blanket hold appears on a user's record:

| Blanket ID | Title | Item ID | Level | Status | Placed | Pickup at | Pickup by | Expires | Suspension | Unsuspend |
|----------------|--------------|------------|-------|--------------|------------|-----------|-----------|------------|------------|-----------|
| Total holds: 4 | | | | | | | | | | |
| | Dark river | 310000737 | TITLE | (unavalla... | 10/25/2010 | CAFFEY | | 4/23/2011 | | |
| | Mr. Monk ... | 310001172 | TITLE | (unavalla... | 10/25/2010 | CAFFEY | | 4/23/2011 | | |
| | Standardi... | 310000368 | COPY | (unavalla... | 10/25/2010 | ARROWO... | | 4/23/2011 | | |
| HOLD-8 | American ... | 3094700... | TITLE | (unavalla... | 10/25/2010 | ARROWO... | | 11/30/2010 | | |
| | Revolutio... | 3107000... | TITLE | (unavalla... | 10/25/2010 | ARROWO... | | 11/30/2010 | | |
| | Revolutio... | 3107000... | TITLE | (unavalla... | 10/25/2010 | ARROWO... | | 11/30/2010 | | |
| | Thomas J... | 3107000... | TITLE | (unavalla... | 10/25/2010 | ARROWO... | | 11/30/2010 | | |
| | The Revol... | 3107000... | TITLE | (unavalla... | 10/25/2010 | ARROWO... | | 11/30/2010 | | |

Displaying Hold Information

Staff can view hold records with different wizards within WorkFlows.

Display User Holds Wizard

The *Display User Holds* wizard is used to display all holds placed by a specific user.

To display holds for a user

Within the Holds group of wizards, click the **Display User Holds wizard**.

1. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
- 2.

| Title | Item ID | Level | Status | Placed | Pickup at | Pickup | Expires | Suspe... | Unsus... | Mail se... |
|---------------|-----------|-------|-------------|------------|-----------|--------|------------|----------|----------|------------|
| Blank... | | | | | | | | | | |
| Dark river | 310000... | TITLE | (unavall... | 10/25/2... | CAFFEY | | 4/23/20... | | | |
| Mr. Mon... | 310001... | TITLE | (unavall... | 10/25/2... | CAFFEY | | 4/23/20... | | | |
| Standar... | 310000... | COPY | (unavall... | 10/25/2... | ARROW... | | 4/23/20... | | | |
| Puff, th... | 310000... | TITLE | (unavall... | 10/26/2... | ARROW... | | 4/24/20... | | | |
| HOLD-8 | | | | | | | | | | |
| America... | 309470... | TITLE | (unavall... | 10/25/2... | ARROW... | | 11/30/2... | | | |
| Revoluti... | 310700... | TITLE | (unavall... | 10/25/2... | ARROW... | | 11/30/2... | | | |
| Revoluti... | 310700... | TITLE | (unavall... | 10/25/2... | ARROW... | | 11/30/2... | | | |
| Thomas... | 310700... | TITLE | (unavall... | 10/25/2... | ARROW... | | 11/30/2... | | | |

3. Click the glossary links within the list of holds to display more detailed information.
- 4.

Click **Close**.

NOTE: The "unused" holds will disappear from the user's record once the required number of items have been CHECKED OUT from the Hold shelf.

Display Title Holds Wizard

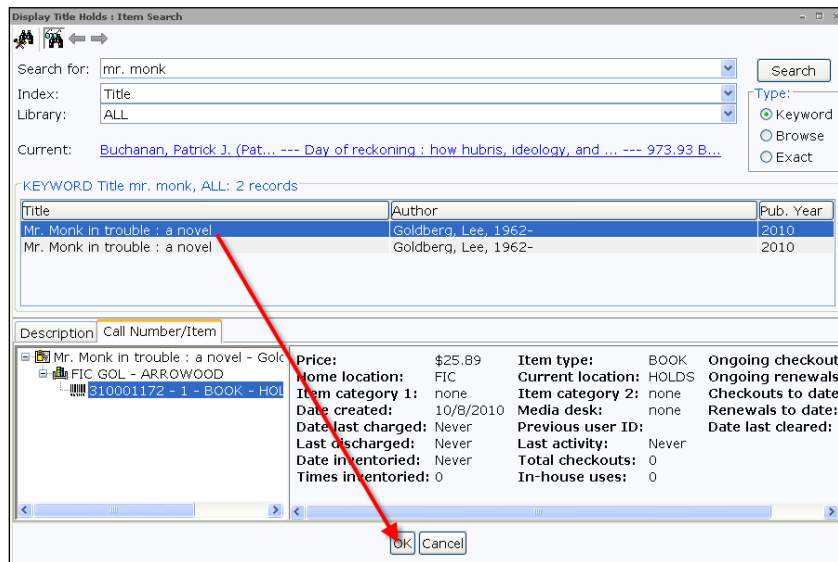
The *Display Title Holds* wizard lists and summarizes all Title level holds placed on a title. This allows staff to see various hold counts and item counts to help determine how many Title level holds of various ranges are on a title, as well as how many items attached to a title can be used to fill holds.

To display title level holds

Within the Holds group of wizards, click the **Display Title Holds wizard**.

Search for the title you want to display. If you receive a hit list, highlight the title you want to view and click **OK**.

- 1.
- 2.



- 3.
- 4.

Click the glossary links within the list of holds to display more detailed information.

Click **Close**.

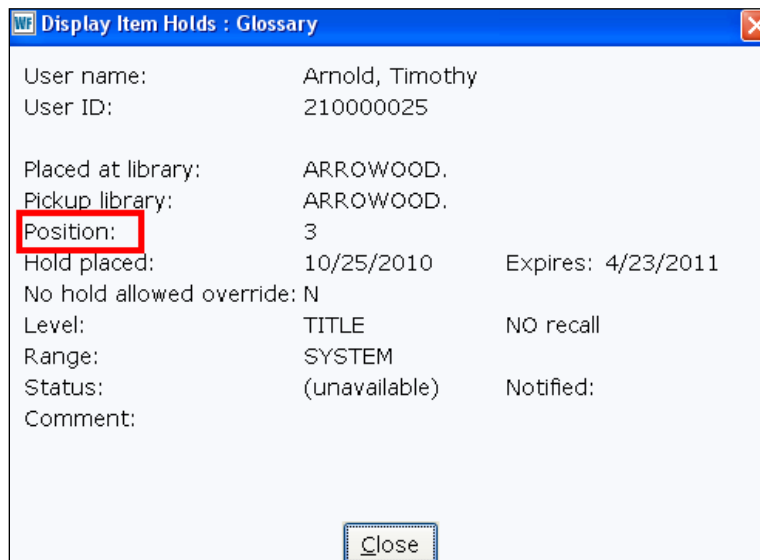
Display Item Holds Wizard

Staff can use the *Display Item Holds* wizard to display a list of holds placed on a specific item.

To display item holds

Within the Holds group of wizards, click the **Display Item Holds wizard**.

1. Search for the title you want to display. If you receive a hit list, highlight the title you want to view and click **Display This Item's Holds**.
2. Click the glossary links within the list of holds to display more detailed information. These glossaries will display the user's position within the holds queue.
- 3.



- 4.
- 5.

Click **Close**.

Click **Close**.

Modifying Holds

The *Modify Holds for User* and *Modify Holds for Items* wizards allow you to change the following information about a user's hold:

- Pickup library
- Expiration date
- Comment
- Recall status
- Date suspended/unsuspended

Modify Holds for User Wizard

To modify a user's hold

1. Within the Holds group of wizards, click the **Modify Holds for User wizard**.
2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
3. To modify all of the user's holds, click the **Select All** check box. To modify selected holds, select the **Modify** check box next to each hold you want to modify.

4. Click **Modify**.

Modify Holds for User : Lambert, Sonia

Modify Holds Fields

Allow Recall No Recall Recall now (RUSH)

Pickup at: Expires:

Date suspended: Date unsuspended:

Mail Item to User: Yes No Mail service:

Comment: Append Replace Remove

OK Cancel

Make the necessary changes such as the pickup library or suspension dates.

5. Click **OK**.
6. Click **Close**.
- 7.

Reorder Hold Queue Wizard

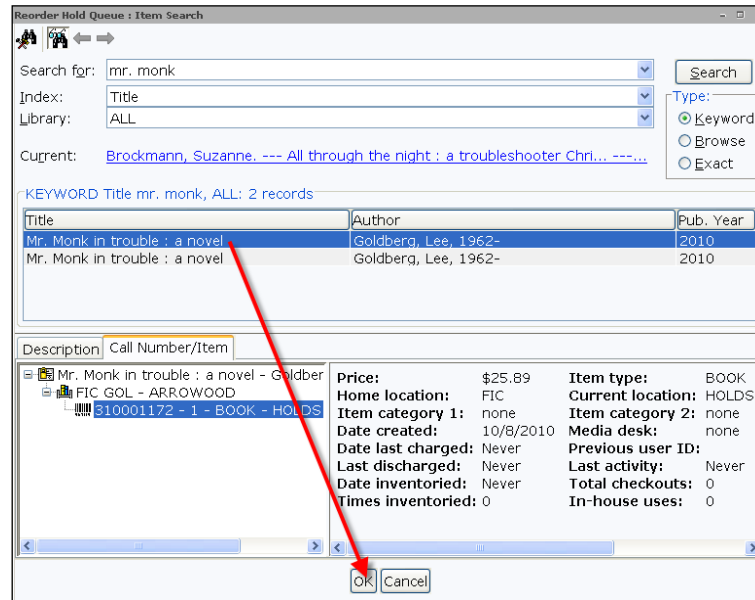
The *Reorder Hold Queue* wizard will allow staff to move a hold or group of holds up or down in the queue.

To reorder the hold queue

Within the Holds group of wizards, click the **Reorder Hold Queue wizard**.

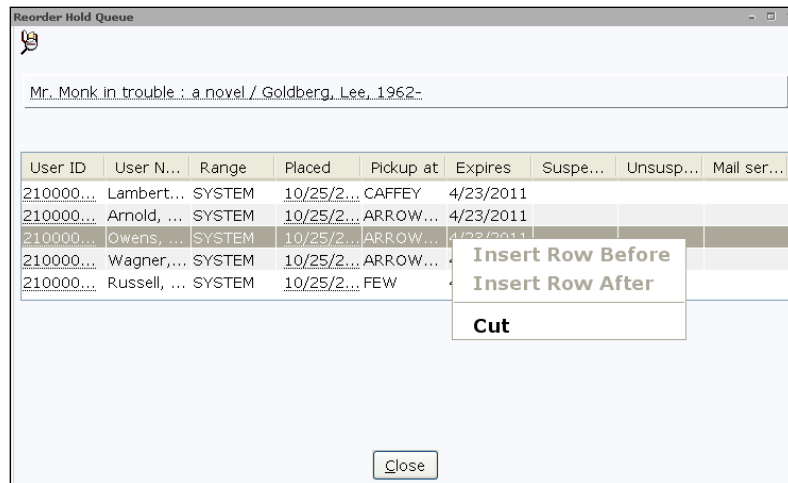
Search for the title you want to reorder the hold queue. If you receive a hit list, highlight the title you want to view and click **OK**.

- 1.
- 2.



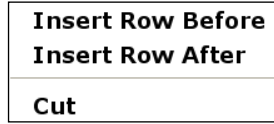
- 3.

Highlight the hold line(s) by clicking the line (and dragging the cursor down or up to select multiple lines), right-click, and select **Cut**.



Highlight the hold line where you want to insert the hold(s), right-click, and select **Insert Before** or **Insert After**.

4.



After reordering the hold queue, click **Close**.

5.

Working with Onshelf Holds

If your library permits holds on materials on the shelf, staff can either use the List Onshelf Items with Holds report or the *Onshelf Items* wizard.

Onshelf Items Wizard

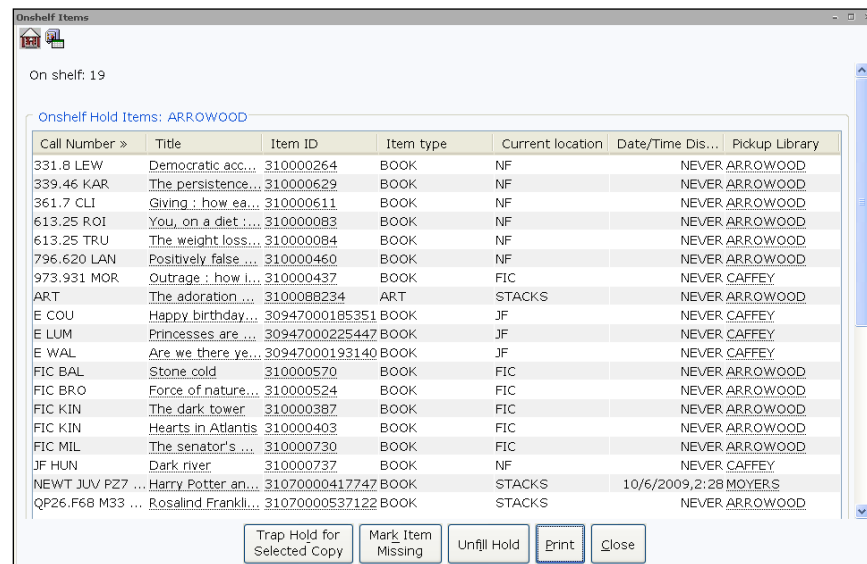
The *Onshelf Items* wizard is used to display items on the shelf in your library that are wanted for holds. By default, the wizard will display a list of holds wanted from the station login library.

For the station library only, you can select an item in the list and perform the following:

- Trap the selected hold.
- Mark the selected item as missing.
- “Unfill” a hold.

To display the onshelf hold items list

1. Within the Holds group of wizards, click the **Onshelf Items wizard**.



- 2.
- 3.

To print the list of titles, click **Print**.

Once the materials have been collected from the shelf, to trap a hold, highlight the title and click **Trap Hold for Selected Copy**. However, if you printed the list, you can use our preferred method of scanning the items into the [Trap Holds wizard](#), once you have pulled them from the shelf.

NOTE: You can also right-click on the title and view a menu of options.

Click **Make Hold Available** or **Put Item in Transit** if the item needs to be routed to a different library.

NOTE: Transit and hold slips can be configured by the System administrator to print automatically. Hold wrappers can also be set up to print.

4. If you cannot locate an item on the list, you could mark it missing; highlight the title and click **Mark Item Missing**.
5. Click **OK**.
6. If you do not want an item to fill a hold, highlight the item and click **Unfill Hold**.
7. Click **OK**.
8. Once you have finished working with the list, click **Close**.

9. **NOTES:**

It is important that the List Onshelf Items with Holds report is run once each night before using the wizard during the day. This is needed to catch any holds that automatically become suspended or unsuspended by the system, or to update the holditem database for any library "closed days" parameters.

To read more about this wizard and its functionality, refer to the SirsiDynix Symphony online Help topic "Onshelf Items Wizard."

List Onshelf Items with Holds Report

This report produces a list of items qualified to satisfy a hold and are available for pickup somewhere in the library system. If you are using the Onshelf wizard, you do not need to view/print this report. However, the report must be scheduled to run each night, as the onshelf wizard's data is updated by this report.

Below is a sample of the report:

```

                                HOLD PICKUP LIST
                                Produced Mon Oct 25 12:36:20 2010
                                Library: ARROWOOD

973.931 MOR
Morris, Dick
Outrage : how illegal immigration, the United Nations, Congressional r
copy:1      item ID:310000437      type:BOOK      location:FIC
user ID:210000054      user name:Russell, Amy
Pickup library:CAFFEY      Date of discharge:NEVER

FIC BAL
Baldacci, David
Stone cold / David Baldacci
copy:1      item ID:310000570      type:BOOK      location:FIC
user ID:210000040      user name:Wagner, Deborah
Pickup library:ARROWOOD      Date of discharge:NEVER

FIC BRO
Brockmann, Suzanne
Force of nature : a novel / Suzanne Brockmann
copy:1      item ID:310000524      type:BOOK      location:FIC
user ID:210000040      user name:Wagner, Deborah
Pickup library:ARROWOOD      Date of discharge:NEVER

FIC KIN
King, Stephen, 1947-
Hearts in Atlantis / Stephen King
copy:1      item ID:310000403      type:BOOK      location:FIC
user ID:210000773      user name:Bailey, Stephanie
Pickup library:ARROWOOD      Date of discharge:NEVER

```

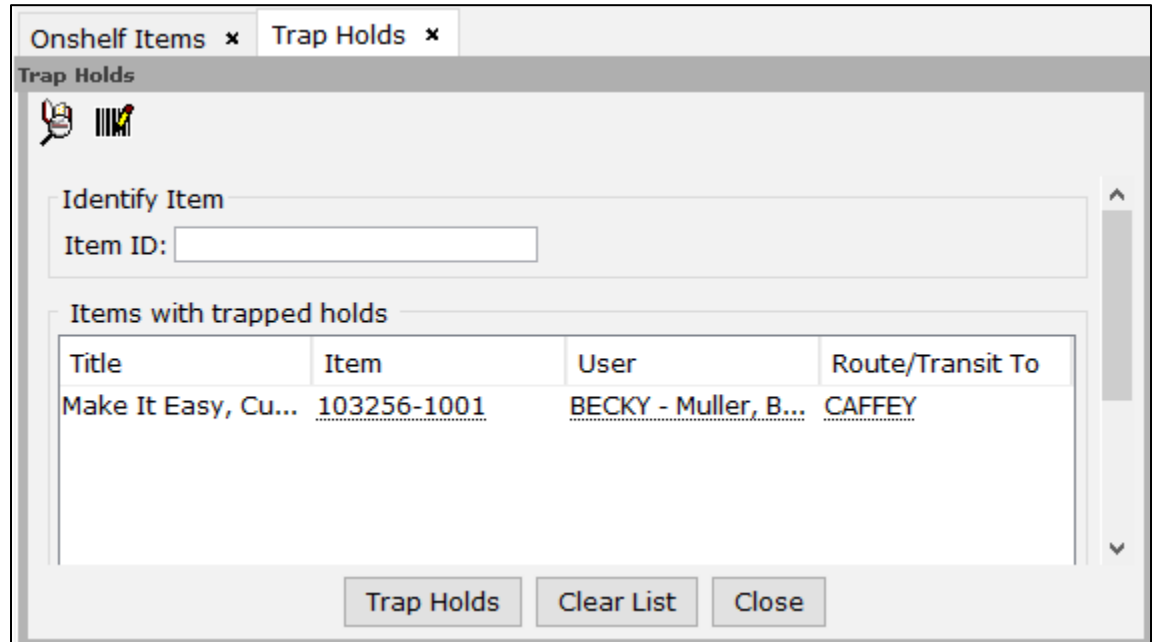
Once items are collected using the report output, staff will scan the items within the *Trap Holds* wizard.

NOTE: Transit and hold slips can be configured by the system administrator to print automatically. Hold wrappers can also be set up to print.

Managing the Holds Shelf

Trap Holds Wizard

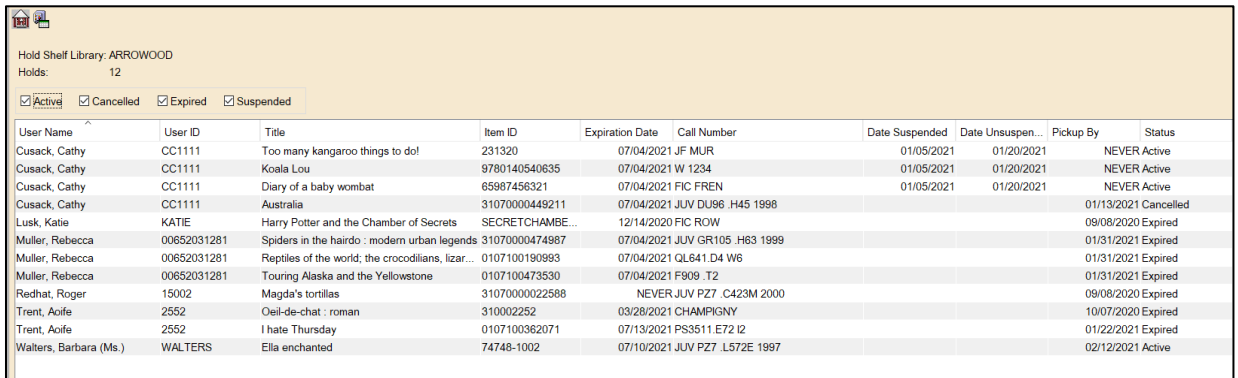
While holds can be trapped from the Onshelf Holds wizard, they can also be scanned directly into the Trap Holds wizard. This is the suggested way to trap holds, as staff have to physically scan an item's barcode to trap the hold. This limits the chances of accidentally marking an item as trapped that was not actually pulled from the shelf.



This wizard will notify staff of any actions needed, such as sending the item to another branch.

Manage Hold Shelf Wizard

After items have been placed on the hold shelf for pickup, changes still take place. Staff need real-time access to be able to manage those holds, without having to run reports. This wizard can modify holds that are on the shelf, as well as clear holds that have become inactive. You can use the check boxes at the top of the wizard to limit the view as desired. It will also give you a count of the holds.



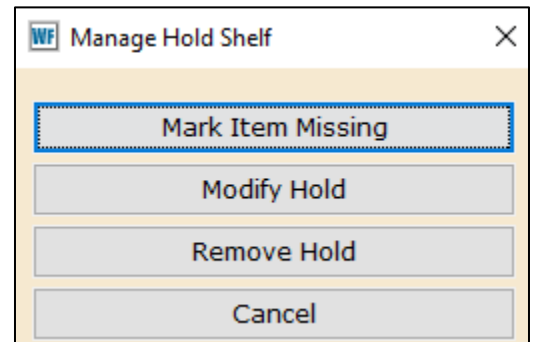
Hold Shelf Library: ARROWOOD
Holds: 12

Active Cancelled Expired Suspended

| User Name | User ID | Title | Item ID | Expiration Date | Call Number | Date Suspended | Date Unsuspen... | Pickup By | Status |
|------------------------|-------------|---|-----------------|-----------------|---------------------------|----------------|------------------|-----------|----------------------|
| Cusack, Cathy | CC1111 | Too many kangaroo things to do! | 231320 | 07/04/2021 | JF MUR | 01/05/2021 | 01/20/2021 | | NEVER Active |
| Cusack, Cathy | CC1111 | Koala Lou | 9780140540635 | 07/04/2021 | W 1234 | 01/05/2021 | 01/20/2021 | | NEVER Active |
| Cusack, Cathy | CC1111 | Diary of a baby wombat | 65987456321 | 07/04/2021 | FIC FREN | 01/05/2021 | 01/20/2021 | | NEVER Active |
| Cusack, Cathy | CC1111 | Australia | 31070000449211 | 07/04/2021 | JUV DU96 .H45 1998 | | | | 01/13/2021 Cancelled |
| Lusk, Katie | KATIE | Harry Potter and the Chamber of Secrets | SECRETCHAMBE... | 12/14/2020 | FIC ROW | | | | 09/08/2020 Expired |
| Muller, Rebecca | 00652031281 | Spiders in the hairdo : modern urban legends | 31070000474987 | 07/04/2021 | JUV GR105 .H63 1999 | | | | 01/31/2021 Expired |
| Muller, Rebecca | 00652031281 | Reptiles of the world: the crocodilians, lizar... | 0107100190993 | 07/04/2021 | QL641.D4 W6 | | | | 01/31/2021 Expired |
| Muller, Rebecca | 00652031281 | Touring Alaska and the Yellowstone | 0107100473530 | 07/04/2021 | F909 .T2 | | | | 01/31/2021 Expired |
| Redhat, Roger | 15002 | Magda's tortillas | 3107000022588 | | NEVER JUV P27 .C423M 2000 | | | | 09/08/2020 Expired |
| Trent, Aoife | 2552 | Oeil-de-chat : roman | 310002252 | 03/28/2021 | CHAMPIGNY | | | | 10/07/2020 Expired |
| Trent, Aoife | 2552 | I hate Thursday | 0107100362071 | 07/13/2021 | PS3511.E72 I2 | | | | 01/22/2021 Expired |
| Walters, Barbara (Ms.) | WALTERS | Ella enchanted | 74748-1002 | 07/10/2021 | JUV P27 .L572E 1997 | | | | 02/12/2021 Active |

To modify holds that are on the hold shelf

1. Within the Holds group of wizards, open the **Manage Hold Shelf wizard**.
2. The list of current holds will display. Select the hold you wish to modify; and click **Modify**.
3. From this window, you will have the option to mark the item missing, modify the settings of the hold, or remove the hold.
 - a. Marking an item as missing here opens the same options discussed in the [Mark Items Missing section](#) of this guide.
 - b. The Remove Hold option will open the same options discussed in the [Removing a Hold section](#) of this guide.
4. Click **Modify Hold**.



5. From this window, you can change the Pickup library, expiration date, add comments, as well as change the Pickup by date. The Pickup by date is an especially nice option, as this enables staff to allow an item to sit on the hold shelf longer than usual, when necessary for a patron.
6. After making the desired changes, click **OK**.
7. A window will appear letting you know if there is an action that must be taken.

- a. If something like the Pickup by date is changed, no action is needed.
- b. If the Pickup library is changed, then a transit message will appear. The associate slip will also print, assuming it has been configured for this wizard.

Page Hold Shelf

Hold Shelf Library: ARROWOOD
 Holds: 11

Active
 Cancelled
 Expired
 Suspended

| User Name | User ID | Title | Item ID | Expirat... | Call Number | Date S... | Date U... | Pickup ... | Status |
|------------------------|------------|--|-------------|------------|---------------------------|------------|------------|------------|-----------|
| Cusack, Cathy | CC1111 | Too many kangaroo things to do! | 231320 | 07/04/2... | JF MUR | 01/05/2... | 01/20/2... | NEVER | Active |
| Cusack, Cathy | CC1111 | Koala Lou | 9780140... | 07/04/2... | W 1234 | 01/05/2... | 01/20/2... | NEVER | Active |
| Cusack, Cathy | CC1111 | Australia | 3107000... | 07/04/2... | JUV DU96 .H45 1998 | | | 01/13/2... | Cancelled |
| Lusk, Katie | KATIE | Harry Potter and the Chamber of S... | SECRET... | 12/14/2... | FIC ROW | | | 09/08/2... | Expired |
| Muller, Rebecca | 0065203... | Spiders in the hairdo : modern urb... | 3107000... | 07/04/2... | JUV GR105 .H63 1999 | | | 01/31/2... | Expired |
| Muller, Rebecca | 0065203... | Reptiles of the world; the crocodilia... | 0107100... | 07/04/2... | QL641 .D4 W6 | | | 01/31/2... | Expired |
| Muller, Rebecca | 0065203... | Touring Alaska and the Yellowstone | 0107100... | 07/04/2... | F909 .T2 | | | 01/31/2... | Expired |
| Redhat, Roger | 15002 | Magda's tortillas | 3107000... | | NEVER JUV PZ7 .C423M 2000 | | | 09/08/2... | Expired |
| Trent, Aoife | 2552 | Oeil-de-chat : roman | 310002252 | 03/28/2... | CHAMPIGNY | | | 10/07/2... | Expired |
| Trent, Aoife | 2552 | I hate Thursday | 0107100... | 07/13/2... | PS3511.E72 I2 | | | 01/22/2... | Expired |
| Walters, Barbara (...) | WALTERS | Ella enchanted | 74748-10... | 07/10/2... | JUV PZ7 .L572E 1997 | | | 02/12/2... | Active |

| User Name | User ID | Title | Author | Item ID | Call Number | Routed ... | Destinat... |
|-----------|---------|------------------------|-----------------|-------------|--------------------|------------|-------------|
| | | Diary of a baby wombat | French, Jackie | 65987456... | FIC FREN | INTRANSIT | CAFFEY |
| | | Australia | Heinrichs, Ann. | 31070000... | JUV DU96 .H45 1998 | HOLDS | ARROW... |

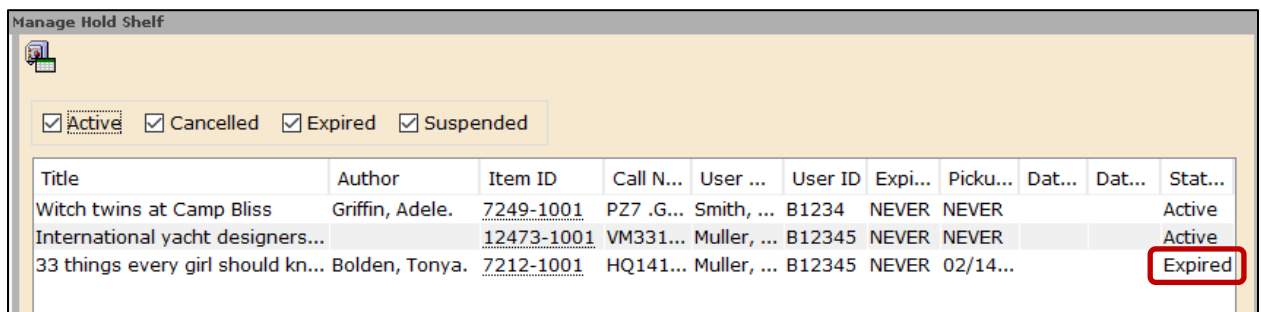
When an action is required, the title will move from the top list, to the lower list, as well.

Note: Many of the features discussed here are optional. You will only have the features enabled by your administrator.

To clear items off of the hold shelf that have become inactive, canceled or expired

The *Process Selected Inactive Holds* button will tell you what needs done with each hold that has become inactive while sitting on the hold shelf. For those who have been using Symphony for many years, this is the equivalent of the Clean Holds Shelf report. Here you are seeing the list and handling the manual step of trap/transit.

1. Open the **Manage Hold Shelf wizard**.
2. Select the Inactive holds from the list. Often, this is the default, as the administrator may choose to have the Active box unchecked (top of list).



| Title | Author | Item ID | Call N... | User ... | User ID | Expi... | Picku... | Dat... | Dat... | Stat... |
|-----------------------------------|-----------------|------------|-----------|-------------|---------|---------|----------|--------|--------|---------|
| Witch twins at Camp Bliss | Griffin, Adele. | 7249-1001 | P27 .G... | Smith, ... | B1234 | NEVER | NEVER | | | Active |
| International yacht designers... | | 12473-1001 | VM331... | Muller, ... | B12345 | NEVER | NEVER | | | Active |
| 33 things every girl should kn... | Bolden, Tonya. | 7212-1001 | HQ141... | Muller, ... | B12345 | NEVER | 02/14... | | | Expired |

3. Click **Process Selected Inactive Holds**.
 - a. If the hold was Expired, the system will tell staff what to do with the item, such as send it back to the owning library.

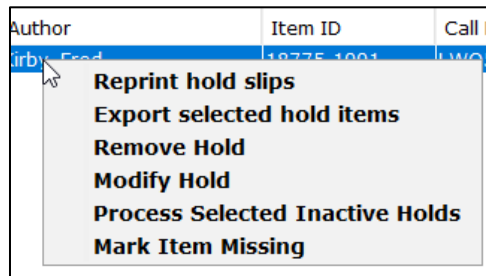
To print selected holds that are on the hold shelf

1. Open the **Modify Hold Shelf wizard**.
2. Select the desired titles (Shift + click for multiple titles at once).
3. Click **Export Selected Hold Items**.


To Reprint hold slips

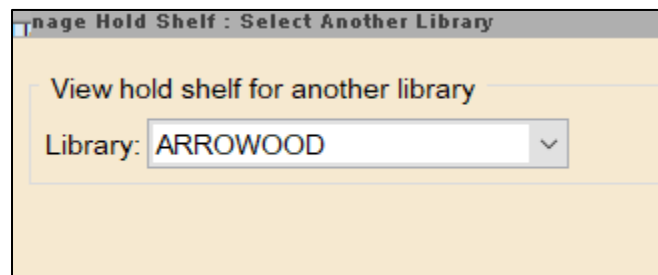
1. Select the desired hold.
2. Click the **Reprint Hold Slip(s) button**.

The options we just reviewed, as well as a few more are available via the right-click menu:



To view another library's hold shelf list

To view the holds shelf list of another library, use the Select Another Library Wizard,  and choose the library from the dropdown list.



NOTE: There are reports that must run in the background to ensure holds are properly maintained or any notices are triggered, related to Holds. These reports are discussed in the [Symphony Administration training guide](#). These reports include Expire Holds, Expire Available Holds, Clean Holds Shelf & most important, the Purge Inactive Holds report. While you may choose not to run the first three, as these steps can be handled manually with the Manage Holds wizard. The Purge Inactive Holds report must run, as it is a system maintenance report.

Removing a Hold

If a user no longer needs an item, staff can remove the hold using either the *Remove User Hold* wizard or the *Remove Item Hold* wizard.

To remove a user's hold

Within the Holds group of wizards, click the **Remove User Hold wizard**.

1. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.

2.

| Remove | Title | Level » | Res... | Status | Pickup at | Suspend... | Unsuspend... | Mail service |
|--------------------------|--------------|---------|--------|--------------|-----------|------------|--------------|--------------|
| <input type="checkbox"/> | Happy bir... | TITLE | N | (unavalla... | CAFFEY | NEVER | NEVER | |
| <input type="checkbox"/> | Dark river | TITLE | N | (unavalla... | CAFFEY | NEVER | NEVER | |
| <input type="checkbox"/> | Mr. Monk ... | TITLE | N | (unavalla... | CAFFEY | NEVER | NEVER | |

3.

To remove all of the user's holds, click the **Select All** check box.

4.

To remove selected holds, select the **Remove** check box next to each hold you want to modify.

5.

Click **Remove Holds**.

6.

A list of removed holds will appear. Click **Close**.

Click **Close**.

The *Remove Item Holds* wizard might best be used when staff needs to remove the holds of the last copy of a title that has gone missing, has been damaged beyond repair, or is lost. This wizard will remove all of the holds on the title.

A report can be run to notify users regarding the removal of a hold.

Working with Items

Depending on your role within the library, you may need to work with items by editing a barcode, marking an item as lost, missing or claims returned, or even need to create a brief bib for ILL materials.

In this section you will learn to:

- Create a brief record to circulate
- Change an Item ID
- Mark an item missing
- Mark an item lost
- Mark an item with a claims returned date

Overview

Each item in your bibliographic database must have a unique identifier called the Item ID. Each item must also be assigned an item type. The item type assigned to each item determines certain characteristics, such as how the item circulates to different users.

In addition, each item must have a home location and a current location. The home location is the permanent location – where the item is supposed to be when not circulating. The current location shows where the item is as a result of circulation activity. This can be considered the “status” of an item. Symphony updates the current location when items are checked out, checked in, put on hold, put in transit, marked missing or lost, or discarded.

There are optional item statistical fields to categorize items in the item record. These might be used to note a funding source, a reading level, fiction/nonfiction category, or an academic department. Other fields indicate permanence, circulation permission, and price. Symphony maintains other item fields including:

- Date the item was created
- ID of the user who last checked out the item
- Date the item last circulated
- Total number of charges (checkouts)
- Total in-house use
- Date inventoried and the number of times inventoried

Creating a Brief Record

The *Add Brief Title* wizard creates a brief record when you need to circulate an item that has not been fully cataloged. When checked in, WorkFlows retains the record. It can be routed to be fully cataloged or it can be removed. You can also use this wizard to enter interlibrary loan items into the catalog.

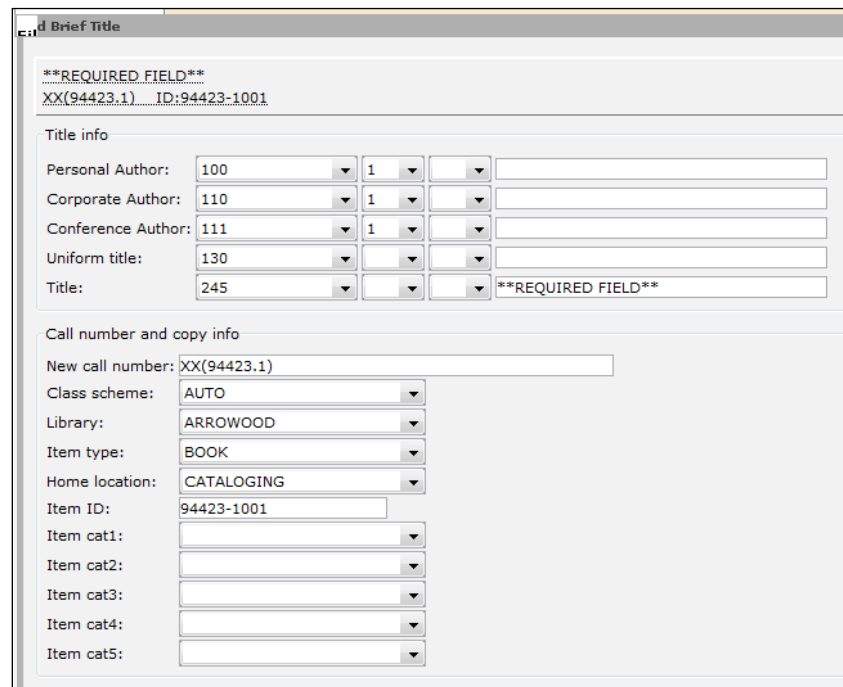
A brief title is shadowed from the public. Only staff can see a brief title in WorkFlows.

This wizard is available as a helper in the *Checkout* wizard and can be used in the same manner as discussed here.



To add a brief title

1. Open the Items group of wizards and click on the **Add Brief Title wizard**.
2. Highlight ****REQUIRED FIELD**** and enter the title.
3. Verify the **Item Type** and **Home Location**.
4. If you do not want to use the auto-generated item ID, scan the barcode into the field or type the **Item ID**.



****REQUIRED FIELD****
XX(94423.1) ID:94423-1001

Title info

Personal Author: 100 1

Corporate Author: 110 1

Conference Author: 111 1

Uniform title: 130

Title: 245 ****REQUIRED FIELD****

Call number and copy info

New call number: XX(94423.1)

Class scheme: AUTO

Library: ARROWOOD

Item type: BOOK

Home location: CATALOGING

Item ID: 94423-1001

Item cat1:

Item cat2:

Item cat3:

Item cat4:

Item cat5:

Click **Add Brief Title**.

After the record has been created, select one of the following options:

5.
 - **Add Another Brief Title** to create another brief title.
 - **Make More Changes** to modify the brief title information.
 - **Close** to exit the wizard.
- 6.

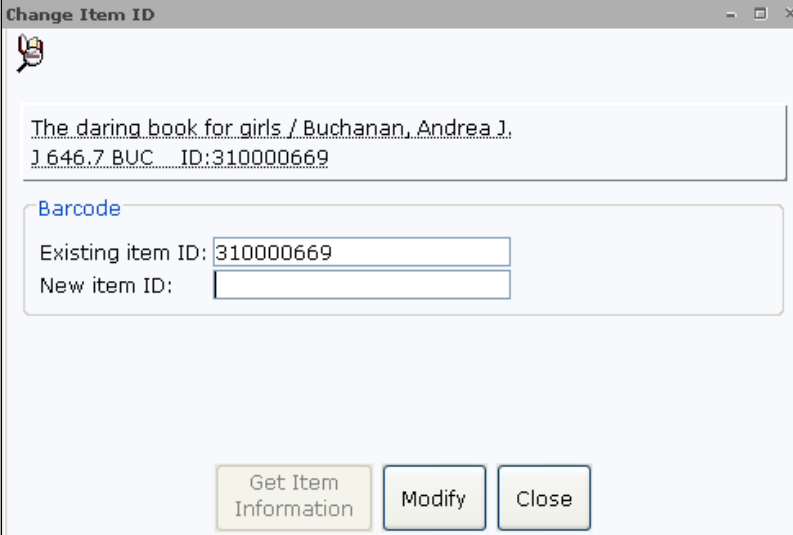
Changing an Item ID

The *Change Item ID* wizard allows circulation staff to assign a new barcode to an item that has an unreadable or missing barcode. This wizard gives access to the barcode field only, protecting the bibliographic record from any modification.

To change an item ID

Within the Items group of wizards, click the **Change Item ID wizard**.

1. Search for the item you want to change. If you receive a hit list, highlight the title you want to view and click **Change Item ID**.
2. In the New Item ID field, scan or type the new item's barcode and click **Modify**.
- 3.



The screenshot shows a window titled "Change Item ID" with a magnifying glass icon. It displays the following information:

- Title: The daring book for girls / Buchanan, Andrea J.
- Barcode: 1 646.7 BUC ID:310000669
- Barcode section with two input fields:
 - Existing item ID: 310000669
 - New item ID: (empty)
- Buttons at the bottom: "Get Item Information", "Modify", and "Close".

4. All of the item's information transfers over to the new barcode such as previous user ID and total checkouts for the item.

Click **Close** to exit the wizard.

NOTE: You can also perform this function while checking out items to a user in the Checkout wizard.

Mark an Item Missing

The *Mark Item Missing* wizard is used to check out an item in the catalog to the MISSING user when staff cannot locate it. By checking out the item to this user, it changes the Current Location to MISSING. This alerts staff and shadows (hides) the item from the public, so they do not spend time or effort looking for the missing item.

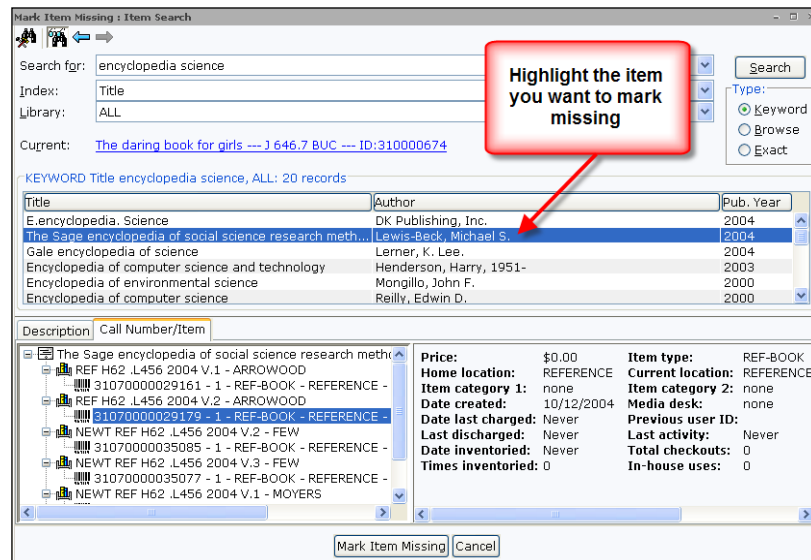
To mark an item missing

Within the Items group of wizards, click the **Mark Item Missing wizard**.

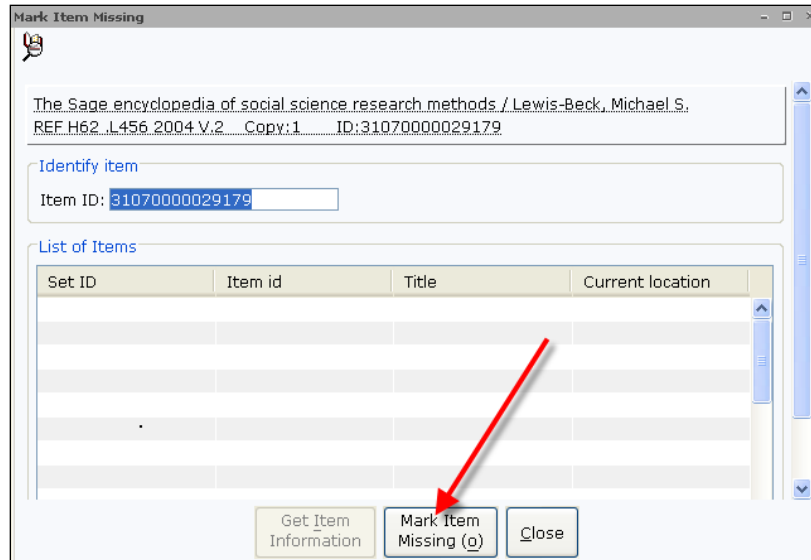
1. Search for the item you want to mark missing. If you receive a hit list, highlight the appropriate title.

2. If there are multiple item records, select the item you want to change and click **Mark Item Missing**.

3.



Click **Mark Item Missing**.



5. If the item does not normally circulate or check out to the public, type in the appropriate override in the field and click **Override & Mark Item Missing**.

6. To mark another item missing, follow steps 2-4 again and step 5 if you receive an override screen. Once you have finished marking items missing, click **Cancel** to the Item Search window. The missing items now appear.

7. Click **Close**.

1. **To see a list of missing items**

2. Open the Users group of wizards and click the **Display User wizard**.

3. In the User ID field, type MISSING and click **Display This User**.

4. If it is not already displaying, click the **Checkouts** tab.

5. To see the items missing at your library, select the library from the dropdown list (below the title list); and verify that the button next to **Owning Library** is selected.

Click **Close**, once you are done viewing the records.

To restore the item's normal status or Current Location, simply check in the item using the *Check In* wizard.

Mark an Item Lost

The *Mark Item Lost* wizard is used to mark an item in the catalog as lost and change the item's Current Location or status to LOST-CLAIM without discharging it from the user's record. When you mark an item lost, you have the option of creating a lost bill and assessing a processing fee.

When an item is marked lost, SirsiDynix Symphony does the following:

- Shadows the item in the catalog so that other users do not inquire about them.
- Prevents holds from being placed against them.
- Prevents items from being recalled or used to satisfy a hold.
- Keeps the item on the user's record until the lost item bill is paid, forgiven or waived or if it is returned to the library.
- Maintains the Current Location of LOST-CLAIM until the item returns to circulation.

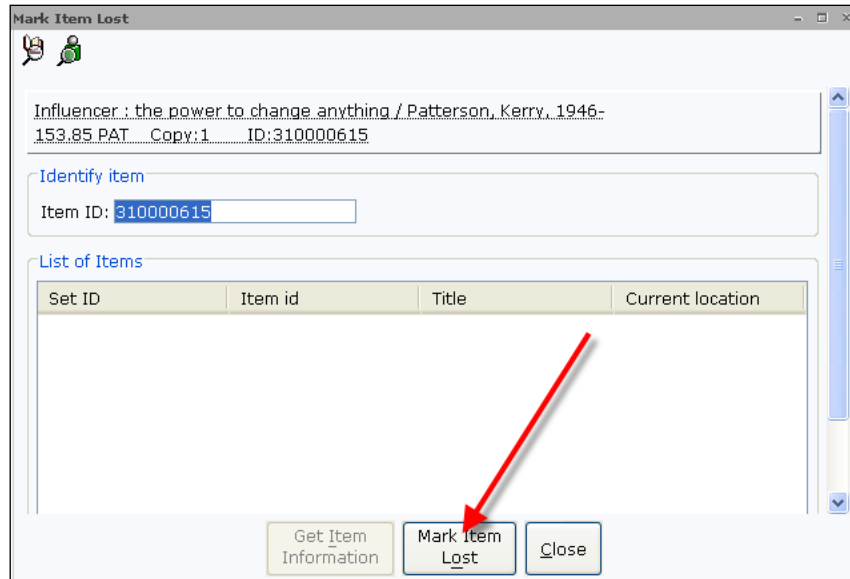
NOTE: When viewing item records in WorkFlows, staff will also see items marked LOST-ASSUM. The Assumed Lost report will automatically mark an item as lost after a specified period after the due date. This functions in a similar to LOST-CLAIM, but does not require that each item be marked manually.

For more information, refer to the WorkFlows online Help topic "FAQs: Marking Items as Lost."

1. **To mark an item lost**
2. Within the Items group of wizards, click the **Mark Item Lost wizard**.
3. Click the *User Search* helper (if the user does not have the library card available) and search for the appropriate user record.
4. Within the list of checkouts, select one or more of the items, or
5. click the Select All box.

Click **Mark Item Lost**.

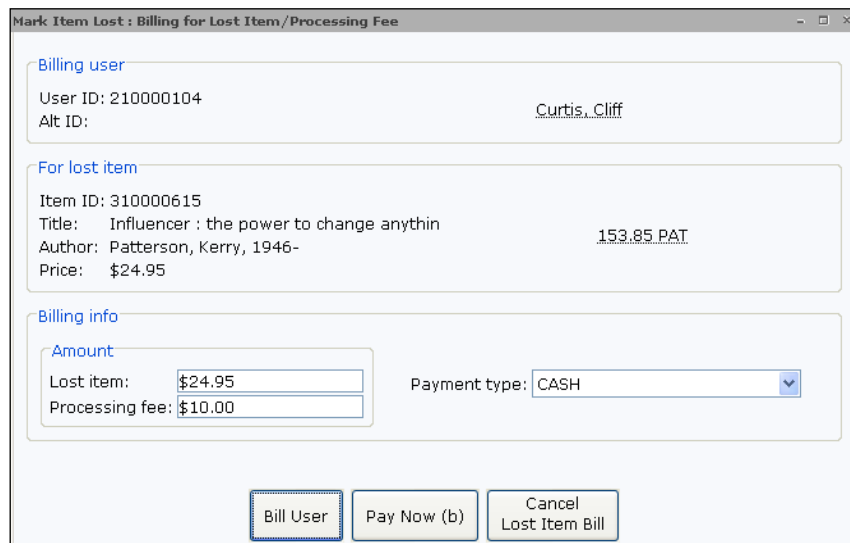
Click **Mark Item Lost** again.



If the price field contain a zero amount, enter a price.

6. Enter or change the Processing Fee, if necessary.

7.



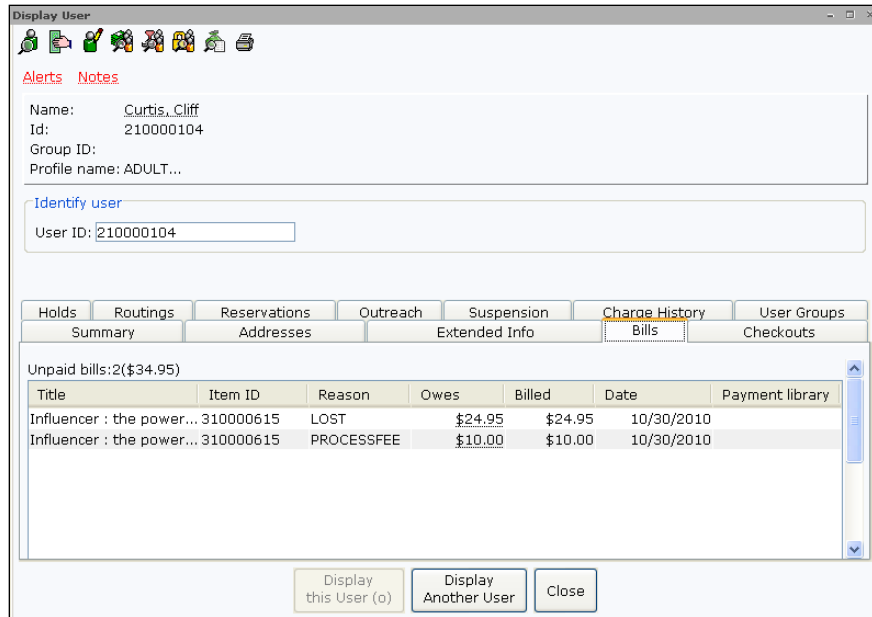
8.

9. If the user wants to pay for the entire bill, select the Payment Type from the dropdown and click **Pay Now**. If they will pay later, click **Bill User**.

10.

Click **OK** to the confirmation message.

Click **Close**.



If an item is returned or found before the user pays the lost bill, Symphony displays a message when you check in the item, check it out to another user, renew the item, or put the item in transit. Symphony clears the item's LOST-CLAIM or LOST-ASSUM Current Location and removes the lost item bill from the user record. If you assessed a lost item processing fee at the time the item was marked lost, and if the library's policies are configured, Symphony automatically removes the processing fee from the user's record as well. The overdue fine for the item is calculated and added to the user record.

NOTE: Depending on the SirsiDynix Symphony policies, it is possible to have a credit account refund be automatically created on the user's record when a paid lost item is returned within a certain number of days. This is discussed in Appendix B of this training guide.

Marking an Item Claims Returned

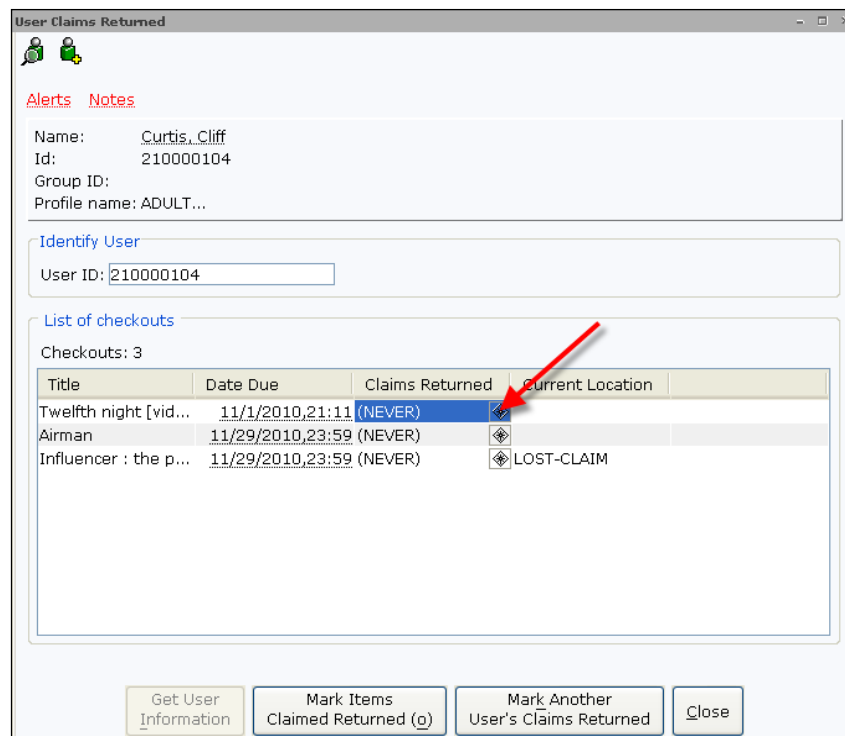
The *User Claims Returned* wizard marks an item that a user claims to have returned. If a user receives an overdue notice but claims to have returned the materials, staff needs to mark the materials with a claims returned date. Once marked, the user no longer accrues overdue fines for that item; however, the item continues to appear on the patron's current checkout list.

A Claims Returned status is usually considered a temporary status. The item remains charged to the patron for a time until the library determines if it is necessary to declare the item lost.

To mark an item claims returned

Open the Special group of wizards and click the **User Claims Returned wizard**.

1. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
- 2.
3. Click the **Calendar gadget** next to each item the user claims was returned and select a date. This updates the information in the Claims Returned column.

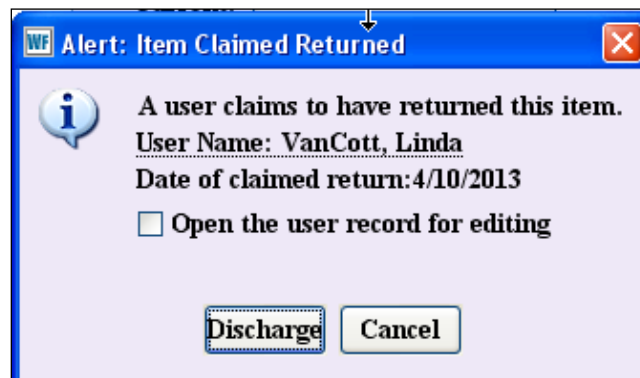


Click **Mark Items Claimed Returned**. A “Record Updated” message appears next to each item that was claimed returned.

4.

| List of checkouts | | | |
|-----------------------|--------------------------|-----------------|------------------|
| Checkouts: 3 | | | |
| Title | Date Due | Claims Returned | Current Location |
| Twelfth night [vid... | 11/1/2010,21:11 | 10/30/2010 | Record updated |
| Airman | 11/29/2010,23:59 (NEVER) | | |
| Influencer : the p... | 11/29/2010,23:59 (NEVER) | | LOST-CLAIM |

5. When these are checked in, you can enable a pop up that will alert you that this was a claimed returned item, with a prompt allowing you to edit the user's record. *This feature is also available in the Discharging Bookdrop wizard.*



6. Click **Close**.

Special Circulation Functions

In this section, we introduce you to special circulation tasks, such as marking items used, creating circulation statistics for ephemeral items, and viewing and receiving in transit items.

In this section you will learn to:

- Mark items used for statistical purposes.
- Check out impermanent materials such as forms, paperback novels, etc.
- View and receive items in transit.

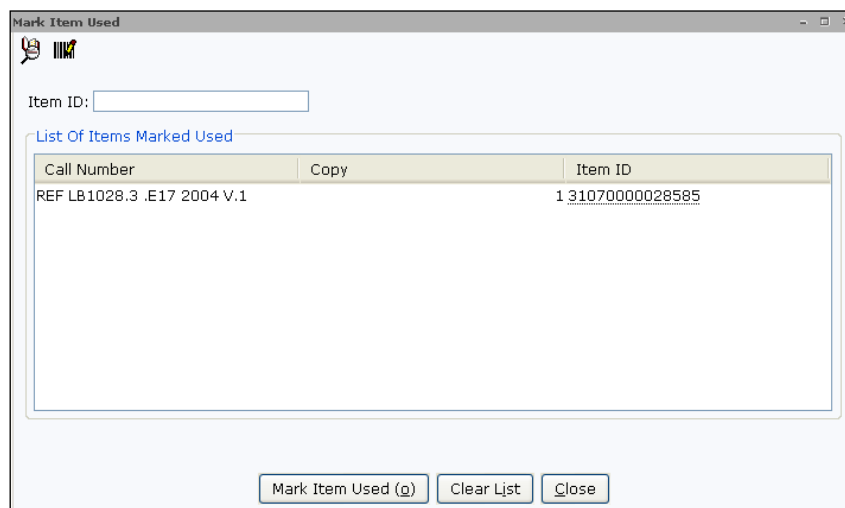
Marking Items Used

The *Mark Item Used* wizard lets you track usage for items that were used in the library but not checked out by a user. Items retrieved from various areas of the library, such as the Reference or Periodical section, can be marked for statistical purposes. These items are not actually charged.

To mark an item used

1. Open the Special group of wizards and click the **Mark Item Used wizard**.
2. Scan the item or type in the item ID and click **Mark Item Used**.

- 3.
- 4.



The screenshot shows a window titled "Mark Item Used". At the top left is a logo. Below it is a text input field labeled "Item ID:". Underneath is a table with the title "List Of Items Marked Used". The table has three columns: "Call Number", "Copy", and "Item ID". One row of data is visible: "REF LB1028.3 .E17 2004 V.1" under Call Number, "1" under Copy, and "1 31070000028585" under Item ID. At the bottom of the window are three buttons: "Mark Item Used (g)", "Clear List", and "Close".

Continue to scan items until finished.

Click **Close**.

In the *Item Search and Display* wizard, you will now see Last activity and In-house uses values. These values can be used as selection criteria within reports.

The screenshot shows the 'Item Search and Display' window with the following details:

- Title:** Education and technology : an encyclopedia / Kovalchick, Ann.
- Call Number/Item:** REF LB1028.3 .E17 2004 V.1
- Item ID:** 3107000028585
- Copy number:** 1
- Type:** REF-BOOK
- Item library:** ARROWOOD
- Home location:** REFERENCE
- Current location:** REFERENCE
- Date created:** 10/10/2004
- Date last charged:** Never
- Date due:** none
- Last discharged:** Never
- Date inventoried:** Never
- Times inventoried:** 0
- Previous user ID:**
- Last activity:** 10/30/2010
- In-house uses:** 1

The 'In-house uses' field is highlighted with a red box. The 'Extended information' section shows tags: CIRCNOTE, PUBLIC, and STAFF.

Checking Out Ephemeral Items

The *Ephemeral* wizard is used to check out impermanent materials to a library user. Libraries may have items that they want to circulate, but do not want to track for overdue notices or billing purposes. Impermanent materials can include items such as donated paperback and pamphlets.

This wizard checks out a number of copies to an item ID created for a type of impermanent materials. You can use the *Add Brief Title* wizard to create the record needed to use in the *Ephemeral* wizard.

The screenshot shows a software window titled "Add Brief Title". At the top, it displays a message: "**REQUIRED FIELD**" followed by "XX(97167.1) ID:97167-1001". Below this, there are two main sections. The first section, "Title info", contains five rows of data: "Personal Author:" with a dropdown set to "100", "Corporate Author:" with a dropdown set to "110", "Conference Author:" with a dropdown set to "111", "Uniform title:" with a dropdown set to "130", and "Title:" with a dropdown set to "245". The second section, "Call number and copy info", contains seven rows: "New call number:" with a text field containing "XX(97167.1)", "Library:" with a dropdown set to "ARROWOOD", "Item type:" with a dropdown set to "BOOK", "Home location:" with a dropdown set to "STACKS", "Item ID:" with a dropdown set to "PAPERBACK", "Item cat1:" with an empty dropdown, and "Item cat2:" with an empty dropdown. At the bottom of the window, there are four buttons: "Add Brief Title (a)", "Modify", "Add Another Title", and "Close".

The wizard checks out an item out and then immediately discharges it. The *Ephemeral* wizard repeats the charge and discharge sequence for every item presented for check out.

Checkout transactions are recorded for statistical reports and checkout data, but they are not used for generating late notices or bills.

1.

To check out impermanent items

Within the Special group of wizards, click the **Ephemeral wizard**.

The screenshot shows the 'Ephemeral' application window. It contains several sections:

- User information:** A header section for user details.
- Identify User:** A section with a 'User ID' input field and a 'Current' dropdown menu showing 'Arnold, Jeffrey' and '210000029'.
- Enter item to checkout:** A section with an 'Item ID' input field, a '# copies' input field, and a 'Current' dropdown menu showing 'Education and technol...', 'REF LB1028.3 .E17 2004 V.1', and '31070000028585'.
- List of checkouts:** A table with columns for 'Number of Copies', 'Title', and 'Date Due'. The table is currently empty.
- Buttons:** Four buttons at the bottom: 'Get User Information', 'Check Out Item To User', 'Check Out To New User', and 'Close'.

2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
3. Type the number of copies.
4. Scan the barcode or type the item ID and click **Check Out Item To User**.
5. Click **Close**.

Viewing and Placing Items in Transit

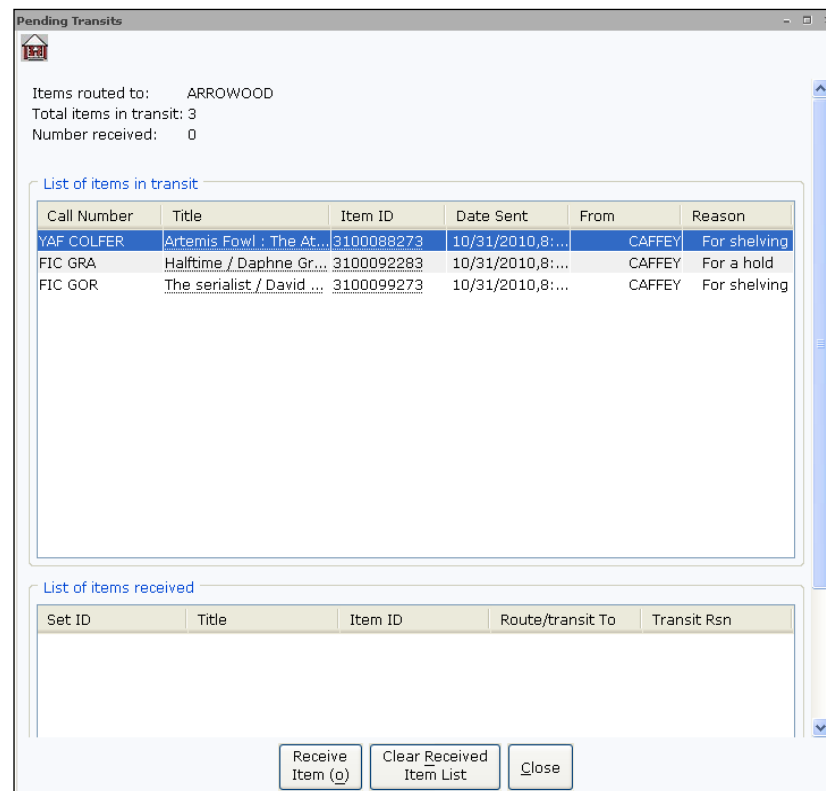
In a multi-library system, you will have to receive items that have been put in transit to your library. Items in an in transit status are either being sent back to the owning library to be reshelved, or it might be to fulfill a hold request.

The *Pending Transits* wizard is used to display a list of items currently in transit to a specific library.

To view items in transit

Open the In-Transit group of wizards and click the **Pending Transits** wizard.

1.



2.

3.

4.

To see another library's in transit items, click the **Select Another Library helper**.



Select a library from the dropdown list and click **OK**.

Click **Close**.

Library staff can receive in transit items using the *Receive Transit* wizard to take items out of transit. You can perform this same function using the *Check In* wizard.

To receive an in transit item

Within the Common Tasks group of wizards, click the **Check In wizard**.

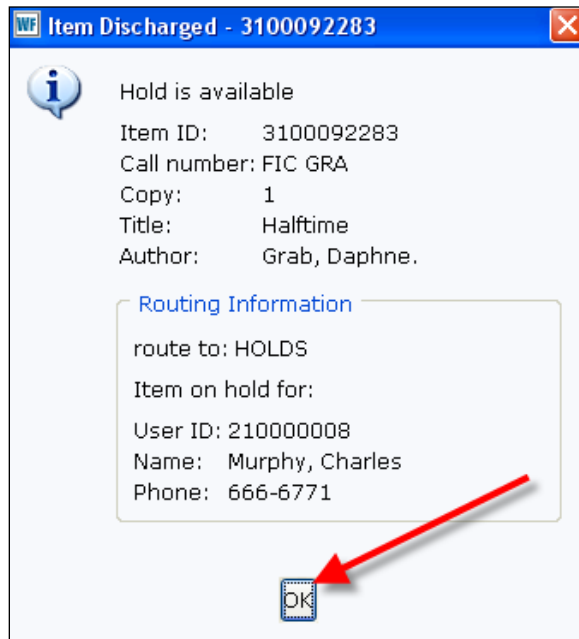
Scan the item or type in the item ID and click **Discharge Item**.

For items to be placed on the hold shelf, click **OK**.

1.

2.

3.



4.

Continue scanning items until finished. Click **Close** to exit the wizard.

NOTE: The List Transits report can provided a printed list of transits based on selections made in the report.

Cash Management

The Cash Management group of wizards enables the library to perform simple point of sale-style transactions such as sales, refunds, voids, and no sales as well as producing till summaries. This is intended for a library storefront, in which the library sells books and other items.

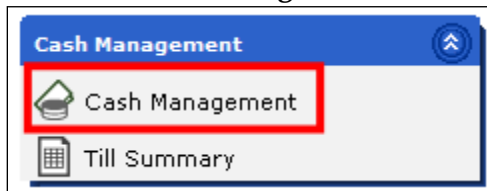
NOTE: This feature is not delivered enabled. Contact Customer Support to activate this feature.

Cash Management Wizard

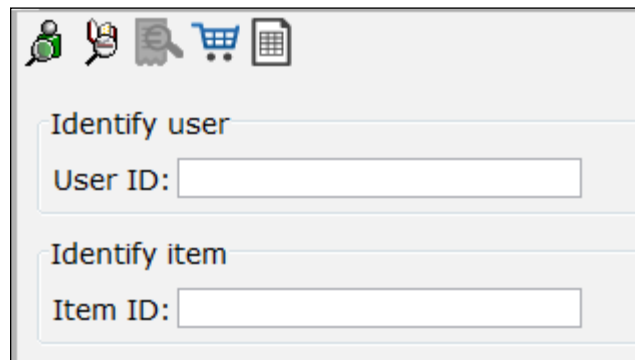
The Cash Management wizard is used to sell items, as well as pay existing bills.

To make a sale

1. Click the **Cash Management wizard**.



2. Scan or type the **User ID**.
3. Scan or type the **Item ID**, for items in your catalogue. (for items not in your catalogue, see the "Ad hoc Sales" section below)

A screenshot of a software interface showing a form for the Cash Management wizard. The form has a light grey background and a header with five icons: a person, a cash register, a hand holding a card, a shopping cart, and a document. Below the header, there are two sections: "Identify user" with a "User ID:" label and a text input field, and "Identify item" with an "Item ID:" label and a text input field.

4. Click the "**Complete Transaction**" button.
5. Enter the applicable amount in the **Payment Amount** field.
6. Select a payment type from the **Payment Type drop-down** list.
7. Click "**Add Payment**".
8. Click "**Submit Payments**".

Subtotal: £65.10
 Total Tax: £0.00
 Total Owed: £65.10

Payment Amount:
 Payment Type: Paid with currency

| Payment type: | Payment Amount: |
|--------------------|-----------------|
| Paid with currency | 66.00 |

Total Payments: £66.00
 Change: £0.90


Buttons: Add Payment, Submit Payments, Remove Payment, Update Payments, Cancel

- If the amount paid is greater than the amount owed, a dialog box noting the amount of change owed to the user displays.

Paying Bills

Within the Cash Management wizard, staff can add existing bills to the sale total.

To add a user's bills to the sale

- Click the "Add a user's bills to the sale" helper. 
- Select which bills you would like to add to this transaction.
- Click "Add Bills".

Select which bills to add to sale

Select All

| Title | Item ID | Reason | Owes |
|---|------------|----------------------|--------|
| <input type="checkbox"/> Lady of passion | C900396764 | Damaged material | £9.99 |
| <input type="checkbox"/> The Starbucks experie... | C304353071 | Damaged material | £15.00 |
| <input type="checkbox"/> The computer | C700430570 | Fee for computer use | £2.00 |


Buttons: Add Bills, Cancel

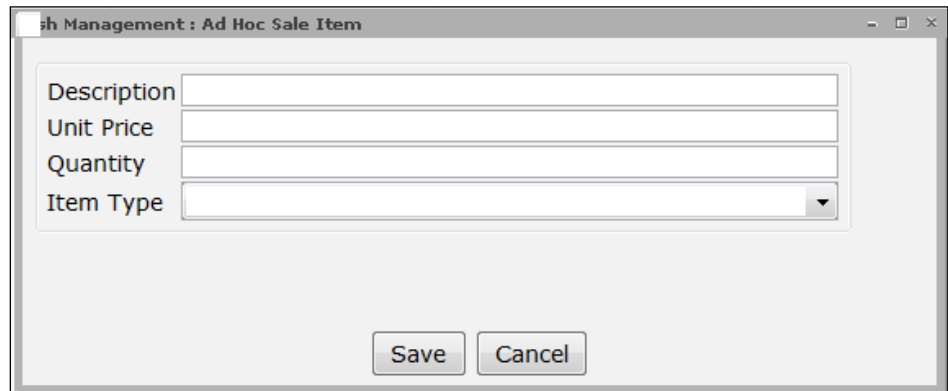
- Finish the transaction as directed in steps 4-9 in the "To make a sale" section above.

Ad hoc Sales

Staff may sell items that have not been created in the catalogue, such as donated books, within the Cash Management wizard.

To add an ad hoc sale item

1. Click the **Add an ad hoc sale item helper**. 
2. Type a **description** of the item being sold, the **unit price**, and the **quantity** of items being sold.



Cash Management : Ad Hoc Sale Item

Description

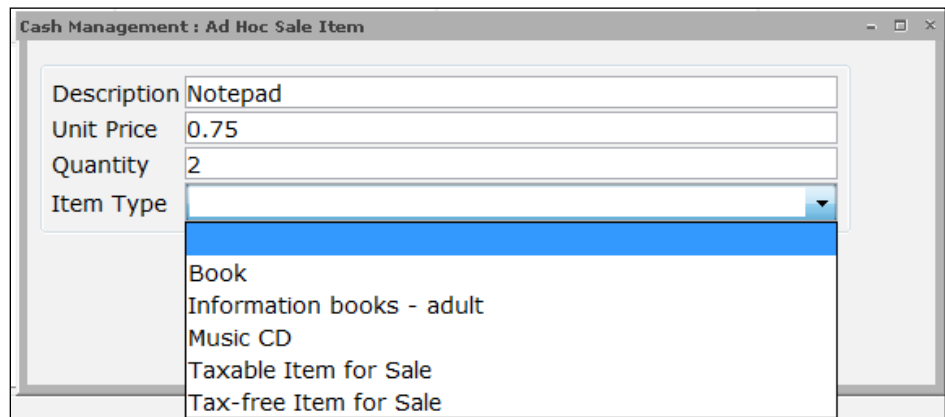
Unit Price

Quantity

Item Type

Save Cancel

3. Choose from the available item types in the **Item Type dropdown** menu.



Cash Management : Ad Hoc Sale Item

Description

Unit Price

Quantity

Item Type

Book
Information books - adult
Music CD
Taxable Item for Sale
Tax-free Item for Sale

4. Finish the transaction as directed in steps 4-9 in the “To make a sale” section above.

Refunds/Voids

The Cash Management wizard enables staff to void or refund sales, as needed.

To make a refund or void transaction

1. In the Cash Management wizard and *before* scanning a user ID or Item ID, click the **Start New Transaction** button.

| # | Description | Item ID | Item Type | Bill Reason | Quantity | Tax amount | Total Owed: |
|---|-------------|---------|-----------|-------------|----------|------------|-------------|
|---|-------------|---------|-----------|-------------|----------|------------|-------------|

2. Click the **New void** or **New refund** button as appropriate.

Select transaction type

New sale

New no sale

New void

New refund

Cancel

Close

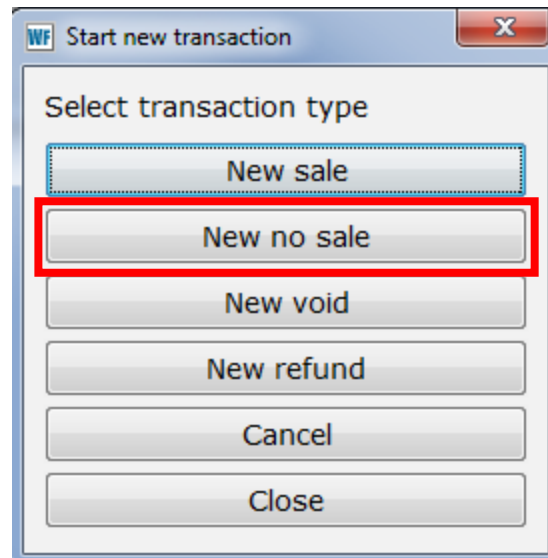
3. Complete steps 2-8 of *"To make a sale"* above, to complete a void or refund.

Opening the Cash Drawer for a “No Sale”

Sometimes staff need to open the cash drawer, without making a sale.

To make a no sale

1. After opening the Cash Management wizard and *before* scanning a user ID or Item ID, click the **Start New Transaction** button.
2. Click the **New no sale** button.



3. You will then see a dialog box with the text “Cash Drawer Opened”.

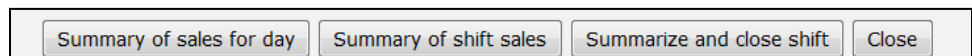
Note: Each no sale transaction is recorded in the history log; consequently, they display in till summaries and Cash Management End of Day report spreadsheet output.

Using the Till Summary Wizard

The Till Summary wizard is used to create point of sale-style summaries of Cash Management transactions made today at the current workstation. These summaries can be generated for three different periods of time.

To view a the daily sales summary

1. Open the **Till Summary wizard** from the Cash Management group.
2. Click **Summary of sales for day** or **Summary of shift sales**, as appropriate.



3. Open the **File menu**; and click the **Print Screen** option to open the summary in the application specified in Print Setup for printing and modification.

Note: If you have a receipt printer configured the "Print summary to receipt" button will also be displayed which will allow you to print the summary directly from WorkFlows.

4. Print the summary.

| Till Summary | | 02/12/2013 | |
|--|------------------|------------|-------|
| Library Name: Armagh Library | | | |
| Station Name: PC Graphical User Interface (Display Mode) | | | |
| Starting Time: 2/12/2013 0:00 | | | |
| Payment Type | Transaction Type | Amount | Count |
| Paid with currency | Sale | £65.10 | 1 |
| Paid with currency | Total | £65.10 | |
| Agreed error | Refund | -£3.00 | 1 |
| Agreed error | Total | -£3.00 | |
| Grand Total | | £62.10 | |
| | No Sale | | 2 |

Note: If printing the Summary of shift sales for the first shift of the day, the starting time of that shift will display as 0:00, the same as the Summary of sales for day. Subsequent shift summaries will show different starting times.

To Summarize and close a shift

1. Open the *Till Summary wizard* from the Cash Management group.
2. Click **Summarize and close shift**.
3. You will see a dialog box asking you to confirm that you want to close out the shift. Click **“Yes”**.
4. Open the **“File”** menu and click the **“Print Screen”** option to open the summary in the application specified in Print Setup for printing and modification.

Note: If you have a receipt printer configured the “Print summary to receipt” button will also be displayed which will allow you to print the summary directly from WorkFlows.

5. Print the summary.

| Till Summary | | 02/12/2013 | |
|--|-------------------------|-------------------|--------------|
| Library Name: Armagh Library | | | |
| Station Name: PC Graphical User Interface (Display Mode) | | | |
| Starting Time: 2/12/2013,0:00 | | | |
| Payment Type | Transaction Type | Amount | Count |
| Paid with currency | Sale | £65.10 | 1 |
| Paid with currency | Total | £65.10 | |
| Agreed error | Refund | -£3.00 | 1 |
| Agreed error | Total | -£3.00 | |
| Grand Total | | £62.10 | |
| | No Sale | | 2 |

Note: WorkFlows does not save till summaries. If you want to keep the summary, you need to print it at this point. If you close the wizard without printing the summary, WorkFlows permanently discards it.

Circulation Sets

If the system is configured, library staff can create circulation sets to circulate a group of individually barcoded items as a set. This feature can be used for book club kits, ESL kits, toy kits, etc.

With this appendix, you will learn to:

- Create a circulation set.
- Check out a circulation set.
- Display circulation sets.
- Modify a circulation sets.
- Remove a circulation set.

Adding a Circulation Set

To create a circulation set

1. Open the Maintain Sets group of wizards and click the **Add Circulation Sets wizard**.

The screenshot shows the 'Add Circulation Sets' wizard interface. It includes the following elements:

- Identify Item** section with an **Item ID** text input field.
- Library**: A dropdown menu.
- Set ID**: A text input field containing the value 'AUTO'.
- Description**: A text input field.
- Category**: A dropdown menu.
- Two checkboxes: **Parental** and **Circulate as Set**.
- Total parts in Set**: 0
- List of Items in Set**: A table with columns: **Add to Set**, **Title**, **Call Number**, and **Item ID**.
- Bottom navigation buttons: **Add Item to Set (b)**, **Make Parent**, **Add Set (g)**, **Clear (i)**, and **Close**.

- 2.

Select the *Item Search helper* to locate a title. 

Search for your title using the **Title** index. If more than one title appears, select your title from the list.

In the **Call Number/Item** tab, highlight the copy you want to include in the set.

3. Click **OK**.
4. Repeat steps 2-6 until you have all of the items needed for the circulation set.
5. Type in a **Set ID**, or allow the system to auto-generate a set ID.
6. If you would prefer to use one of the item barcodes to check out the entire set, do the following:

Use a Set ID or use an item in the list as the "Parent" barcode

| Add to Set | Title | Call Number | Item ID |
|-------------------------------------|------------------------------|-------------|----------------|
| <input checked="" type="checkbox"/> | To kill a mockingbird | DVD LEE | 31070001829384 |
| <input checked="" type="checkbox"/> | Understanding To kill a m... | 813.54-JOH | 31070000143376 |
| <input checked="" type="checkbox"/> | To kill a mockingbird | FIC LEE | 31070000188637 |
| <input checked="" type="checkbox"/> | To kill a mockingbird | FIC LEE | 31070000188699 |
| <input checked="" type="checkbox"/> | To kill a mockingbird | FIC LEE | 31070000188698 |
| <input checked="" type="checkbox"/> | To kill a mockingbird | FIC LEE | 31070000188697 |

Select the **Parental** check box. The Set ID box becomes unavailable.

Highlight one of the items in the List of Items in Set and click **Make Parent**.

Choose a **category** from the list, if necessary.

Type a **description** of the set, if necessary.

Select the Circulate as Set box if you want the items within the set to only circulate as part of the set. If the option is not selected, items within the set can circulate individually.

- 13.
 - 14.
 15. Select **Add Set**.
- Click **OK**.
- Select **Close**.

Checking Out a Circulation Set

Checking out a set of items is similar to checking out regular collection items.

To check out a circulation set

Within the Common Tasks group of wizards, click the **Checkout wizard**.

1. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.
2. Scan the parental item's barcode in the Item ID field, or type the Set ID and click **Check Out Item to User**.
- 3.

Notes

Name: Butler, Jessica
Id: 210000043
Group ID:
Profile name: ADULT...

Identify user

User ID: 210000043

Street: 8979 Center St
City, state: Spanish Fork, UT
Zip: 86676
Phone: 801-555-5558

Identify item

Item ID:

List of checkouts:6

| Title | Item ID | Date Due | Billed | Amount Pai... | Type | Set ID |
|--------------------|---------------|-----------------|--------|---------------|------|-----------|
| To kill a mocki... | 3107000182... | 11/8/2010,23... | | | DVD | BOOK-CLUB |
| To kill a mocki... | 3107000018... | 11/29/2010,2... | | | BOOK | BOOK-CLUB |
| To kill a mocki... | 3107000018... | 11/29/2010,2... | | | BOOK | BOOK-CLUB |
| To kill a mocki... | 3107000018... | 11/29/2010,2... | | | BOOK | BOOK-CLUB |
| To kill a mocki... | 3107000018... | 11/29/2010,2... | | | BOOK | BOOK-CLUB |
| Understandin... | 3107000014... | 11/29/2010,2... | | | BOOK | BOOK-CLUB |

Get User Information Check Out Item To User Check Out To New User Close

- 4.

Click **Close**.

Displaying Circulation Sets

The *Display Circulation Sets* wizard is used to display a list of all items contained in a circulation set.

To display a circulation set

Within the Maintain Sets group of wizards, click the **Display Circulation Sets wizard**.

1. Type in the **Set ID**, or use the *Search by Search Set ID* helper to find the set.
2. After viewing the set, click **Close** to exit the wizard.
3. You can also use the *Item Search and Display* wizard to view circulation sets. Set ID is available in the Index dropdown or search by title to view a set.

Item Search and Display

Search for: book-club

Index: Set ID

Current:

Type:
 Keyword
 Browse
 Exact

BROWSE Set ID book-club: 1 record

| Set ID | Description | Type |
|-----------|---------------|--------------|
| BOOK-CLUB | Book Club Kit | Non-Parental |

Description Items In Set

Set ID: BOOK-CLUB; 6 items

| Title | Call number | Item ID |
|-------------------------------|-------------|----------------|
| Understanding To kill a ... | 813.54 JOH | 31070000143376 |
| To kill a mockingbird / by... | FIC LEE | 31070000188637 |
| To kill a mockingbird / by... | FIC LEE | 31070000188699 |
| To kill a mockingbird / by... | FIC LEE | 31070000188698 |
| To kill a mockingbird / by... | FIC LEE | 31070000188697 |
| To kill a mockingbird / a ... | DVD LEE | 31070001829384 |

Price: \$0.00
Home location: STACKS
Item category 1: none
Date created: 1/23/1996
Date last charged: 10/31/2010
Last discharged: Never
Date inventoried: Never
Times inventoried: 0

Detailed Display Close

Modifying a Circulation Set

Staff can add items to a set or remove individual items from the set using the *Modify Circulation Set* wizard.

To remove an item from a circulation set

Within the Maintain Sets group of wizards, click the **Modify Circulation Sets wizard**.

1. Type the **Set ID** or use the *Item Search* helper to locate the circulation set to be modified.

2. Select the **Remove from Set check box** next to the item(s) you want to remove.

3.

| Remove from Set | Title | Call Number | Item ID |
|-------------------------------------|--------------------------------|-------------|----------------|
| <input type="checkbox"/> | Understanding To kill a m... | 813.54 JOH | 31070000143376 |
| <input type="checkbox"/> | To kill a mockingbird / by ... | FIC LEE | 31070000188637 |
| <input type="checkbox"/> | To kill a mockingbird / by ... | FIC LEE | 31070000188699 |
| <input type="checkbox"/> | To kill a mockingbird / by ... | FIC LEE | 31070000188698 |
| <input checked="" type="checkbox"/> | To kill a mockingbird / by ... | FIC LEE | 31070000188697 |
| <input type="checkbox"/> | To kill a mockingbird / a P... | DVD LEE | 31070001829384 |

4.

Click **Save Set**.

5.

1. Click **OK**.

2. To add an item to a circulation set

Within the Maintain Sets group of wizards, click the **Modify Circulation Sets wizard**.

Type the **Set ID** or use the *Item Search* helper to locate the circulation set to be modified.

Scan in the barcode of the item you want to add or type in the item ID and click **Add Item to Set**. You can also use the *Item Search* helper to locate the item to add to the list.

3.

To add an item to a set, scan the barcode or search for the title with the *Title Search* helper

| Remove from Set | Title | Call Number | Item ID |
|--------------------------|--------------------------------|-------------|----------------|
| <input type="checkbox"/> | Understanding To kill a m... | 813.54 JOH | 31070000143376 |
| <input type="checkbox"/> | To kill a mockingbird / by ... | FIC LEE | 31070000188637 |
| <input type="checkbox"/> | To kill a mockingbird / by ... | FIC LEE | 31070000188699 |
| <input type="checkbox"/> | To kill a mockingbird / by ... | FIC LEE | 31070000188698 |
| <input type="checkbox"/> | To kill a mockingbird / a P... | DVD LEE | 31070001829384 |

Get Set Information Add Item to Set (b) Save Set Modify Another Set (g) Close

4. Once you have added all of the required items, click **Save Set**.

5. Click **Close** to exit the wizard.

Removing a Circulation Set

The *Remove Circulation Sets* wizard is used to remove an entire set.

1. **To remove a circulation set**

2. Within the Maintain Sets group of wizards, click the **Modify Circulation Sets wizard**.

3. Type the **Set ID** or use the *Item Search* helper to locate the circulation set to be removed.

4. Click **Remove This Set**.

5. Click **Yes**.

Click **OK**.

Click **Close**.

Credit User Accounts

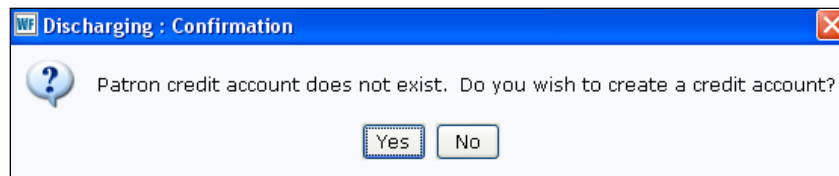
With some policies configured in SirsiDynix Symphony, the Credit User Account feature allows library users to pay bills, fines, privilege fees, and more from a credit or deposit amount. This feature also allows library staff to manually issue refund credit for paid bills, such as reimbursing the user for a paid lost item bill when the item is returned to circulation. Funds can be withdrawn from a credit user account for various library-defined reasons.

Policies will define the “rules” for paying bills with the user credit account, including the types of bills that can be paid with the account and the maximum credit amount allowed. As bills are paid from the account, library staff can review the user account balances and the credit transaction histories. Circulation wizards can be configured to automatically pay bills directly from these credit accounts. For example, as overdue fines are created, when items are checked in, the system will automatically pay these fines with credit account money, as long as the credit balance is more than the amount billed.

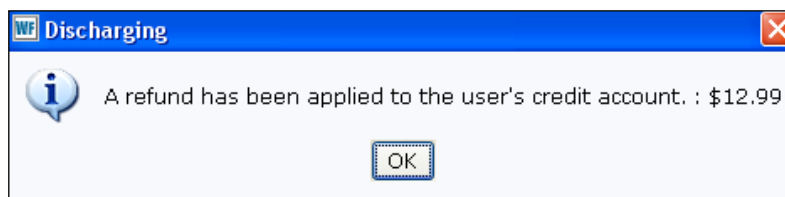
Refunding Paid Bills

Libraries may not want to accept money to create a user’s credit account, but will want paid lost bills to be refunded when returned to circulation. When SirsiDynix Symphony policies are in place, a refund can be issued to the user when a paid lost item has been checked back in.

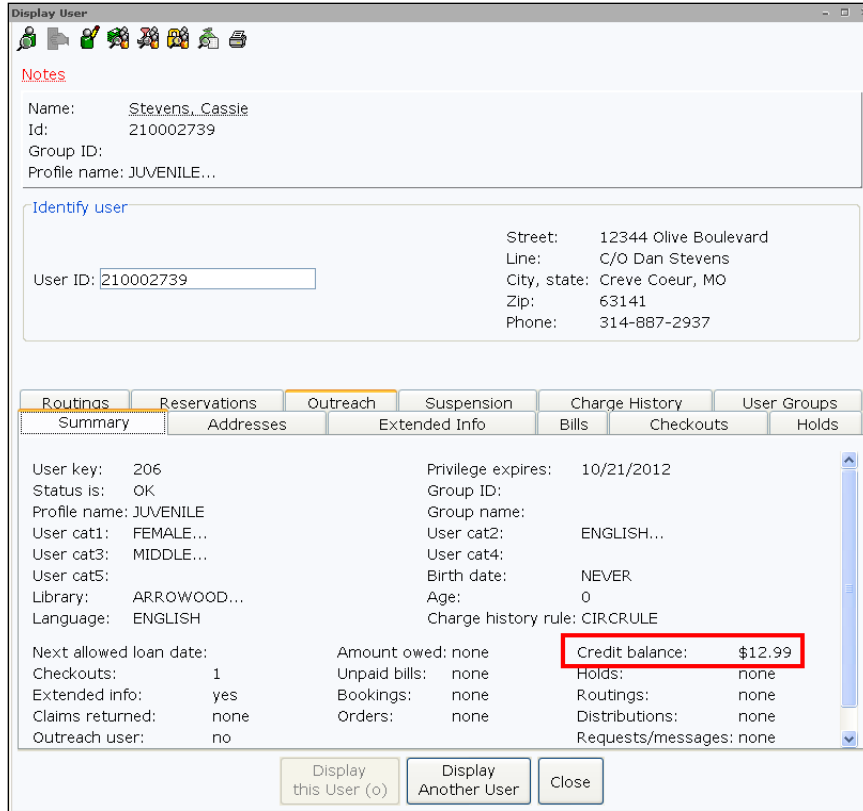
Below is what staff will see when they check in a paid lost item for a user that does not have a credit account established:



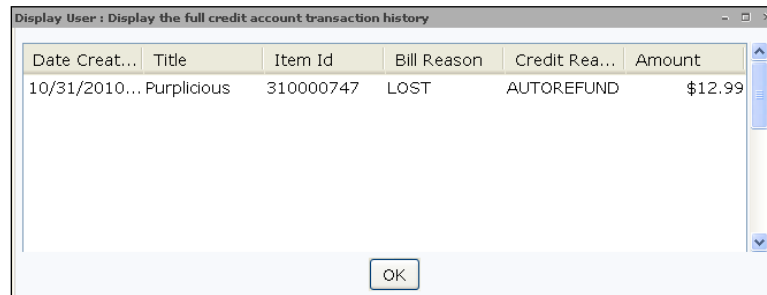
After clicking **Yes** to create the credit account, the following message will appear including the amount credited to the user:



When displaying a user’s record in the *Display User* wizard, the Credit Balance will appear in the **Summary** tab.



Specific information about the credit balance can be found by clicking the *Display the Full Credit Account Transaction History* helper.



1.

2. **To manually refund a paid bill**

3. Open the Special group of wizards, and click the **Credit User Account wizard**.

Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.

Click the **Manual Refund helper**.





Select the bill or bills you want to refund.

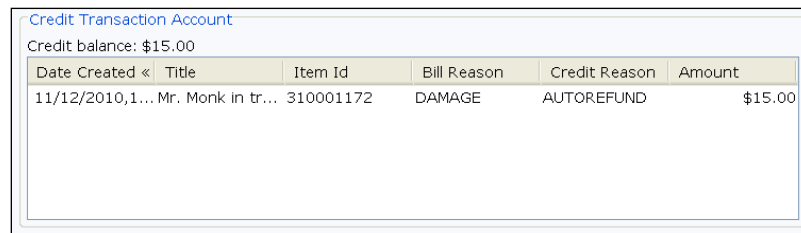
Click **OK**.

4.

Click **Cancel**.

5.

6.



The selected bills are refunded and the bill amounts are credited as a refund credit in the user's credit account.

NOTE: The system can be configured to automatically refund paid lost items within a particular time period. For example, a library may not refund paid lost items after 30 days. This is configured in the Default Price policy by administrators.

1.

To withdraw funds for a paid lost item

2.

Within the Special group of wizards, click the **Credit User Account wizard**.

3.

Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.

Click the **Manual Withdrawal helper**.



Credit User Account : Manual Withdrawal

User ID: 210002739

Credit balance: \$12.99
 Date created: 10/31/2010,10:58
 Date last updated: 10/31/2010,10:58

Amount:

Payment type: CASH

Credit reason: AUTOPAY

Withdraw Funds (o) Close Account Cancel (b)

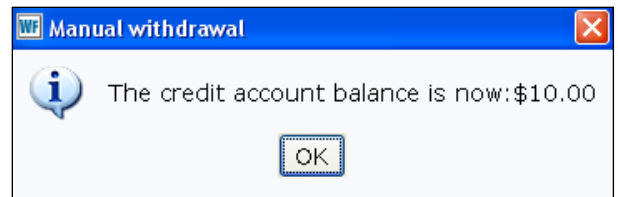
4. Specify the amount of money to be withdrawn from the credit account, the payment type, and the credit reason (the reason for withdrawal).

Click **Withdraw Funds**.

5. Do one of the following:

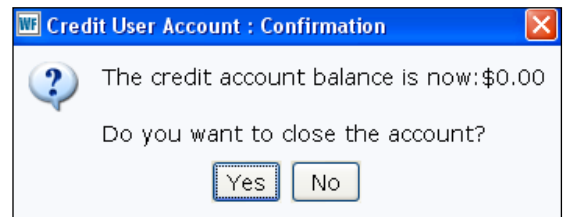
6.

- If the remaining credit account balance is greater than \$0.00, a dialog box displays the current remaining account balance.



Click **OK** to close the dialog box and return to the wizard.

- If the remaining credit account balance is \$0.00, a dialog box displays and asks if you want to close the user's credit account. Click **Yes** to close the account, or **No** to keep the credit account open. After clicking **Yes** or **No**, you are returned to the wizard.



Credit Transaction Account

Credit balance: \$10.00


| Date Creat... | Title | Item Id | Bill Reason | Credit Rea... | Amount |
|----------------|---------|---------------|-------------|---------------|---------|
| 11/15/2010,... | | | | LIBREFUND | \$25.00 |
| 11/15/2010,... | | | | DEPOSIT | \$10.00 |
| 11/15/2010,... | The sun | 3107000045... | LOST | AUTOREFUND | \$25.00 |

Closing a User's Credit Account

To close a credit account

Within the Special group of wizards, click the **Credit User Account wizard**.

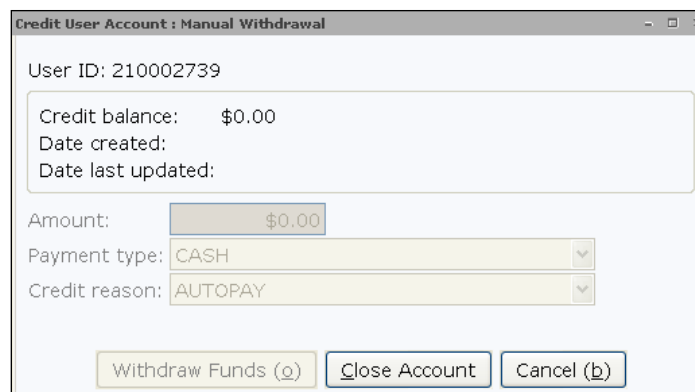
1. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.

2. Click the **Manual Withdrawal helper**. 

Note the current balance in the user's credit account, if any.

3. Do one of the following:

- 4.
5.
 - If the user's balance is currently \$0.00, click **Close Account**.



6.
 - If the user's balance is greater than \$0.00, specify the current balance in the Amount field and select the payment type and the credit reason (the reason for withdrawal).

Click **Withdraw Funds**. Click **Yes** to close the credit account.

Click **OK** to confirm the account has been closed.

Offline Circulation

Offline circulation is the standalone mode of the WorkFlows client. Offline WorkFlows is used to run a SirsiDynix Symphony WorkFlows-style workstation without actually connecting to the Symphony server.

The Offline toolbar provides libraries an automated method to log transactions if the server is unavailable. The data is saved to the hard drive of the PC and automatically transferred to the server. A report will be run system administrators to apply the transaction files to the Symphony database.

Using Offline

The following conditions apply to offline:

- The Offline toolbar can only record activities based on the commands that it can perform.
- Transactions performed in Offline mode must have either an Item ID and/or a User ID.
- WorkFlows cannot search or display information from the Symphony database about items or users while using Offline, since the workstation is temporarily disconnected from the host computer where all of the information is stored.
- Data recorded by Offline will be copied from the hard drive of the PC to the server automatically on the next connection to the server. The system administrator will run the Load Offline Transaction report, which will then try to perform each recorded transaction as if a staff member was at a regular workstation. Errors result when an activity recorded at an Offline workstation would have been blocked or otherwise fail when done in a real Symphony database.

Starting and Using Offline

To log into Offline mode

Start the SirsiDynix Symphony Workflows client.

In the Configuration window, select the **Operate in Offline Mode** check box.

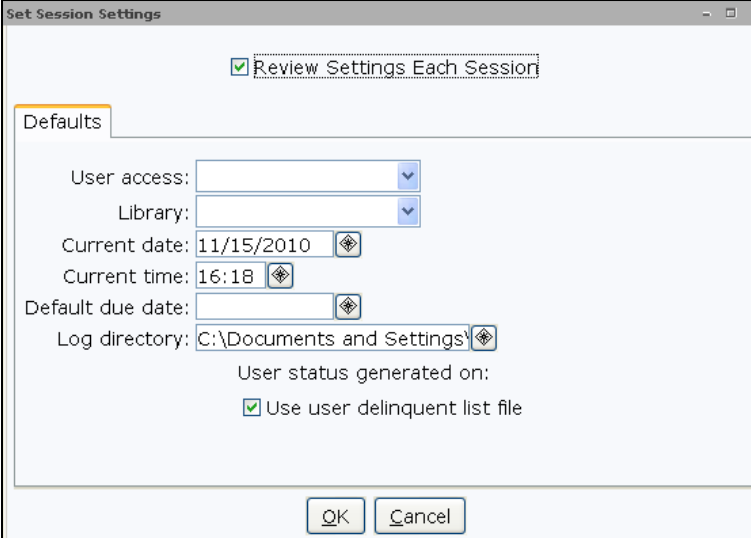
1. Click **OK**.
2. Select the **Offline toolbar**.

3. *NOTE: Staff will see all toolbars in Offline mode, but only the Offline toolbar can be used.*
- 4.

To establish Offline session settings

Click the **Offline Session wizard**.

- 1.



- 2.

- 3.

In the **User Access** list, select the user to associate with the offline transactions, typically CIRC. This is a required field.

- 4.

In the **Library** list, select the home library. This is the library associated with the transactions that are ultimately loaded. This is a required field.

Accept the default values Current Date and Current Time. Transactions recorded at the workstation will be stamped with the PC time.

If necessary, enter a Default Due Date using the gadget. When you leave this field blank, WorkFlows will calculate the due date when the administrator loads offline transactions to the server.

5. **Do not** change the Log Directory path as this is where the WorkFlows client writes the transaction log for all activities performed in the Offline toolbar.

6. Select the **Use User Delinquent List File check box** if the file was generated recently.

7. *NOTE: This list will not be available for the time staff uses Offline during "go-live," which is the time you are no longer connecting to your legacy system and where Symphony is not yet available.*

Click **OK**.

8. *NOTE: When closing out of the initial Offline session, a message will appear asking if the user wants to save the property changes. Once these values have been saved to the PC, they will remain each time staff uses the Offline toolbar.*

Checking Out Items Offline

The Offline *Checkout* wizard checks out material to users when using the offline mode.

To check out materials in offline

In the Offline toolbar, click the **Checkout wizard**.

1.

2.

3. Scan the user's barcode or type in the User ID and press Enter. The cursor will move to the Item ID field.

4. If necessary, click the *Alt Due Date* gadget to set a different due date than the one you may have set in the session settings.

5. Scan the barcode of the item or type in the Item ID and click **Check Out Item To User**.

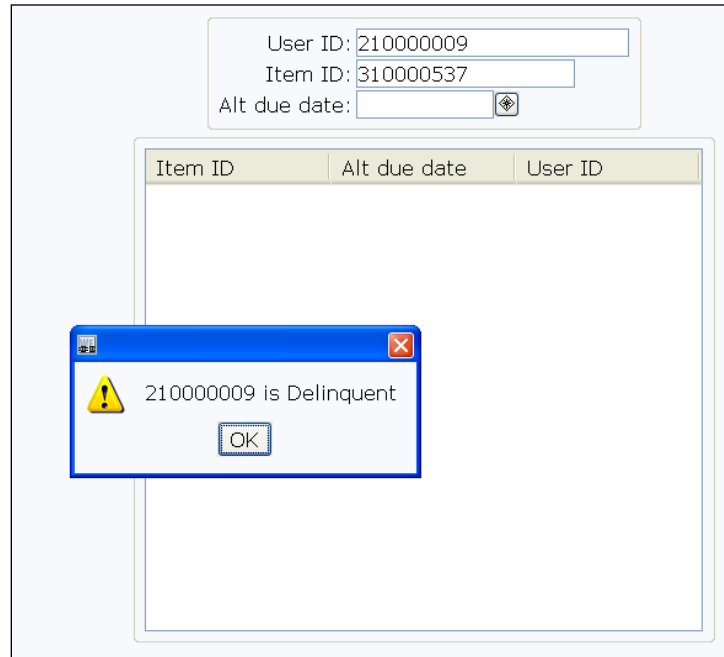
6. If the delinquent list file is used and the user has a delinquent status, click **OK** to continue the checkout.

Continue entering barcodes until all items are checked out.

When you are finished checking out to the user, click **Check Out To New User** to check items out to a different user or click **Close** to exit the wizard.

NOTE: If the workstation has a receipt printer, you can print date due slips.

When checking out an item to a user who is blocked, barred or delinquent because they have unpaid bills or overdue items, a warning message can be displayed.



This message will only appear for users with a Delinquent status where the **Update User Delinquency Status** (Setdelinq) report has been run with the option to 'Generate list of delinquent users' checked.

*NOTE: Users with a status of **BLOCKED** or **BARRED** cannot check out items in offline mode.*

Checking In Items Offline

The Offline *Discharging* wizard checks in material when using the offline mode.

To discharge materials in offline

In the Offline toolbar, click the **Discharging wizard**.

1.

| Item ID | Date of discharge |
|---------|-------------------|
|---------|-------------------|

2.

If necessary, use the *Date of Discharge* gadget to select a different date.

3.

4.

Scan the item's barcode or type in the Item ID and click **OK**.

After all the items have been checked in, click **Cancel** to exit the wizard.

NOTE: When discharging items in a circulation set, you will need to scan each item.

Renewing Items Offline

The Offline *Renew Item* wizard will renew items already checked out to a user.

To renew items in offline

In the Offline toolbar, click the **Renew Item wizard**.

1.

The screenshot shows a window titled "Renew Item". At the top, there are two input fields: "Item ID:" followed by a text box, and "Alt due date:" followed by a text box and a small calendar icon. Below these is a large table with two columns: "Item ID" and "Alt due date". The table is currently empty. At the bottom of the window are two buttons: "OK" and "Cancel".

2.

If necessary, click the *Alt Due Date* gadget to set a different due date than the one you may have set in the session settings.

3.

Scan the barcode of the item or type in the Item ID and click **OK**.

4.

5.

Continue entering barcodes until all items are renewed.

Click **Cancel**.

NOTE: If the workstation has a receipt printer, you can print date due slips.

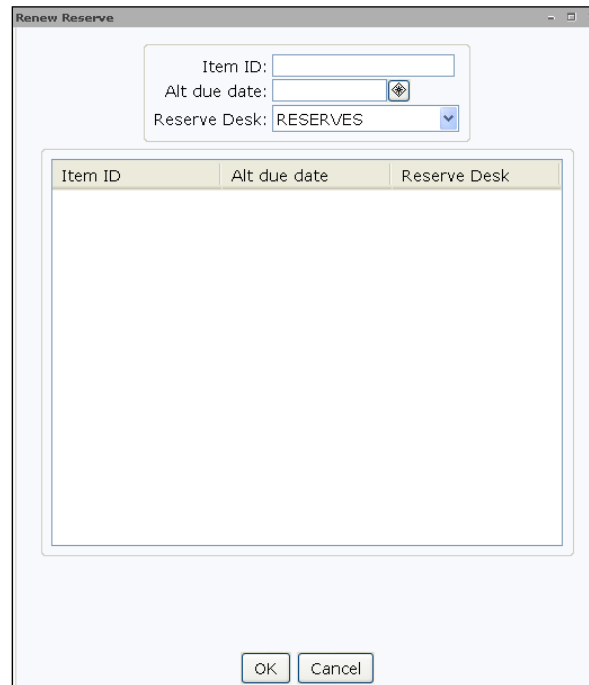
Renewing Reserves Offline

The Offline *Renew Reserve* wizard will renew reserve items already checked out to a user.

To renew reserve items in offline

In the Offline toolbar, click the **Renew Reserve wizard**.

1.



The screenshot shows a dialog box titled "Renew Reserve". At the top, there are three input fields: "Item ID:" with a text box, "Alt due date:" with a date picker icon, and "Reserve Desk:" with a dropdown menu showing "RESERVES". Below these is a large table area with a header row containing "Item ID", "Alt due date", and "Reserve Desk". At the bottom of the dialog are "OK" and "Cancel" buttons.

2.

3.

If necessary, use the Reserve Desk dropdown to select a different reserve desk.

4.

If necessary, click the *Alt Due Date* gadget to set a different due date than the one you may have set in the session settings.

5.

6.

Scan the barcode of the item or type in the Item ID and click **OK**.

Continue entering barcodes until all items are renewed.

Click **Cancel**.

NOTE: If the workstation has a receipt printer, you can print date due slips.

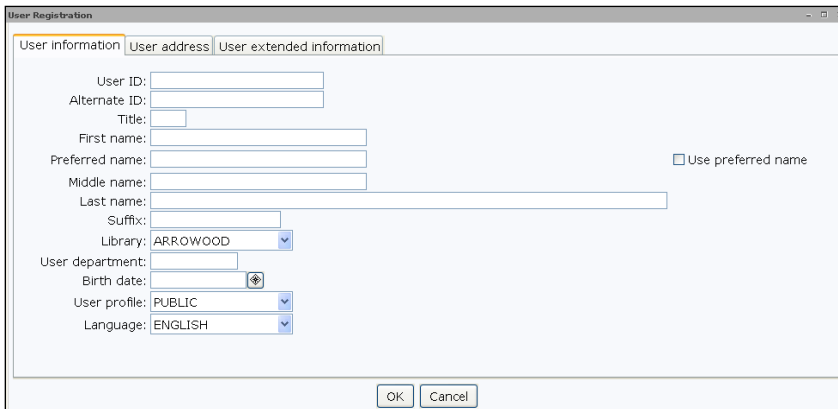
Registering a User Offline

The *User Registration* wizard will allow you to register a user in offline mode.

To register a user in offline

In the Offline toolbar, click the **User Registration wizard**.

1.



The screenshot shows a dialog box titled "User Registration" with three tabs: "User information", "User address", and "User extended information". The "User information" tab is active. It contains the following fields: "User ID:" (text input), "Alternate ID:" (text input), "Title:" (text input), "First name:" (text input), "Preferred name:" (text input) with a checkbox "Use preferred name" to its right, "Middle name:" (text input), "Last name:" (text input), "Suffix:" (text input), "Library:" (dropdown menu showing "ARROWOOD"), "User department:" (text input), "Birth date:" (calendar icon), "User profile:" (dropdown menu showing "PUBLIC"), and "Language:" (dropdown menu showing "ENGLISH"). At the bottom are "OK" and "Cancel" buttons.

2. Enter the user information in the **User Information** tab. The following fields are required:

- User ID
- Last Name
- Library
- User Profile
- Language

3.

4. Add address information about the user on the **User Address** tab.

5. Enter any additional notes regarding the user in the **User Extended Information** tab.

6.

7. Click **OK**.

Click **OK**.

Click **Cancel**.

Going Back Online

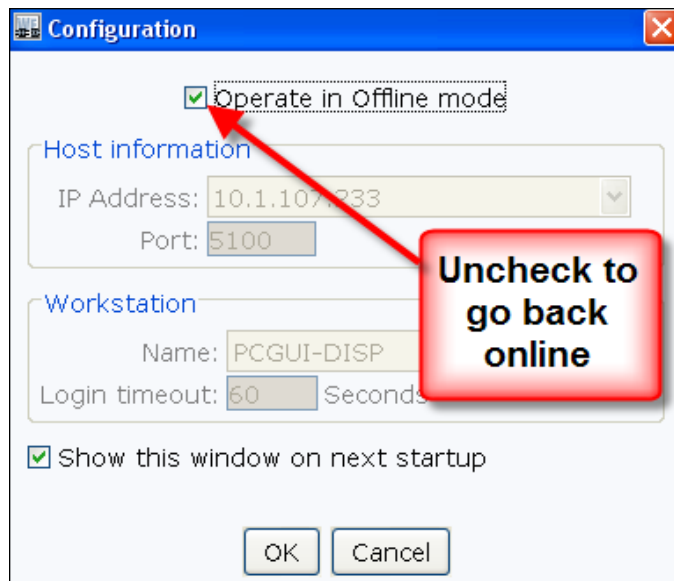
Once the server becomes available again, you can send the recorded transactions to the server and apply them to the SirsiDynix Symphony database.

To send offline transactions to the server

Close the Offline WorkFlows client.

Start the WorkFlows client and clear the **Operate in Offline Mode** check box.

- 1.
- 2.



- 3.
- 4.

Click **OK**.

Enter your WorkFlows login and PIN and click **OK**.

When WorkFlows connects with the server, the log created on the PC is automatically transferred to the server.

The system administrator will run the Load Offline Transactions report to combine, sort, and process each file that was sent to the server.

The system administrator will run two other reports to add the history logs to the monthly statistics logs.

User Groups

The User Groups tab allows you to link user records together for circulation purposes.

This can be used in public library settings to link together members of the same family. The system can be configured to allow the parents to see what their children have checked out and what bills they have. It can also be configured so that all users will inherit the worst case delinquency from any member of the group. For example, if the parent's status is delinquent but the child's is blocked, the parent's status will therefore be blocked.

It can also be used in academic library settings to provide "proxy" charge functionality. The "proxy" charge allows group members to charge items for a designated "head" group member and apply the charges to the "head" group member's card.

To create a new user and assign them to a group

1. Navigate to the Circulation toolbar and open the Users group of wizards.
 2. Click the **User Registration wizard**.
 3. Select a **Profile Name** using the dropdown, if necessary.
 4. Enter the user information in the available tabs and fields.
 5. Click the **User Groups** tab.
 6. Perform one of the following actions:
 - To create a new group name, enter the Group Name into the field.
 - To add this user to an existing group, click the *Group Name* gadget, search for and select the name, then click **OK**.
 8. With the dropdown, change the **Responsibility Policy**, if necessary.
- Make any necessary changes to the Responsibility Type options.

The screenshot shows a 'User Registration' window with the following fields and options:

- Name: Jacob, Irène
- Id: 210007729
- Group ID:
- Profile name: ADULT...

Below these fields are tabs for: Basic Info, Privilege, Demographics, Addresses, Extended Info, and **User groups** (which is selected).

Under the 'User groups' tab, the following settings are visible:

- Group name: 7753
- Responsibility policy: PARENT
- Responsibility level: LINKED
- Responsibility type: HEAD
- Display charges
- Display holds
- Checkout holds
- Remove holds
- Display bills
- Pay bills
- Notice master
- Allow group choice

At the bottom of the window are three buttons: Save, Register Another User, and Close.

9. Click **Save**.


NOTES: To add an existing user to a group, use the Modify User wizard.

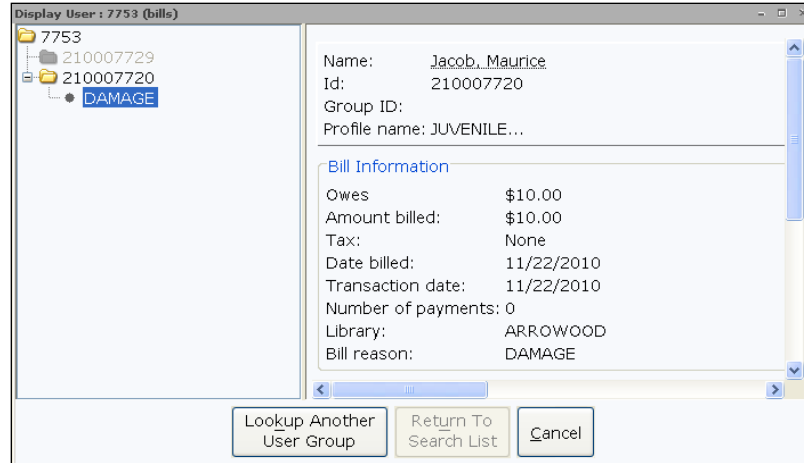
If you clone/copy a user, the Group Name will copy over from the other user record.

1. **To display user group information**

2. Within the Users group of wizards, click the **Display User wizard**.

3. Search for a user within the same group.

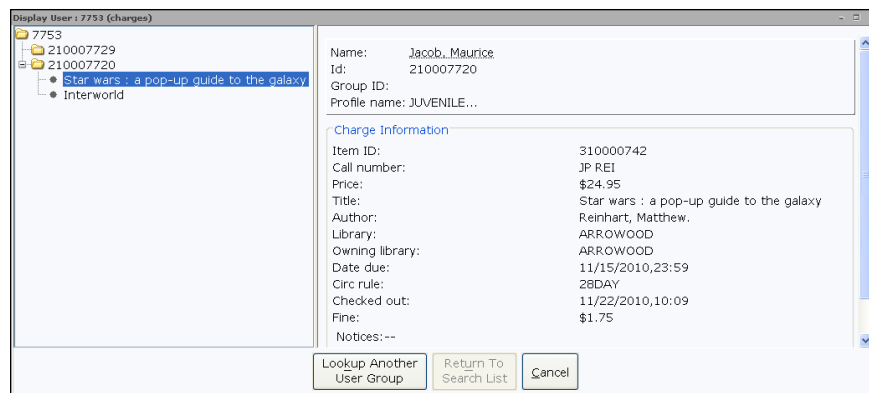
To view the user group bills, click the **Display User Group Bills helper**. 



When finished viewing the information, click **Cancel**.

- 4.
- 5.

To view the items checked out to the group members, click the **Display User Group Charges helper**.

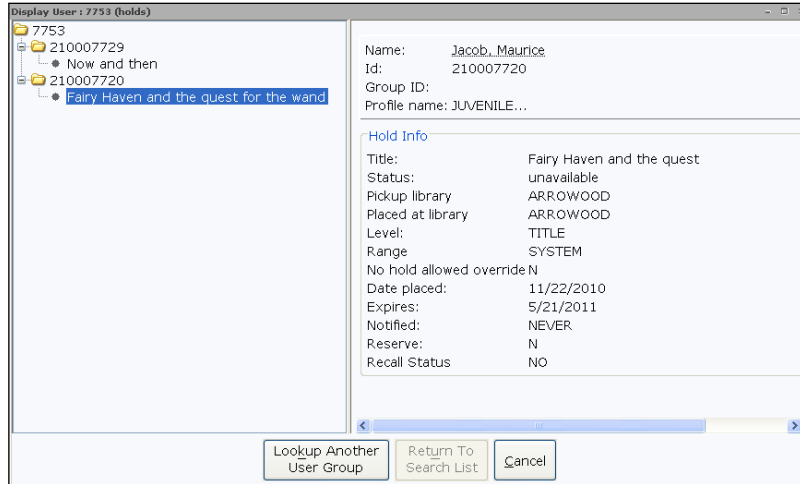


- 6.
- 7.

When finished viewing the information, click **Cancel**.

To view the items on hold for the user group, click the **Display User Group Holds helper**.





When finished viewing the information, click **Cancel**.

- 8.
- 9.

To view general user group information, click the **User Groups** tab.

- 10.

| Summary | | Addresses | | Extended Info | | Bills | | Checkouts | |
|----------------------------|------------|---------------|------------|---------------|------------------|---------------------|---|-----------|--|
| Holds | Routings | Reservations | Outreach | Suspension | Charge History | User Groups | | | |
| Group name: | 7753 | | | | | Display charges: | N | | |
| Responsibility policy: | CHILD | | | | | Display holds: | N | | |
| Responsibility level: | LINKED | | | | | Checkout holds: | N | | |
| Responsibility type: | NONE | | | | | Remove holds: | N | | |
| Number of group members: | 2 | | | | | Display bills: | N | | |
| Date created: | 11/22/2010 | | | | | Pay bills: | N | | |
| | | | | | | Notice master: | N | | |
| | | | | | | Allow group choice: | N | | |
| User Group | | | | | | | | | |
| Number of group members: 2 | | | | | | | | | |
| User name | User ID | Notice master | Status | Bills | Estimated fin... | Overdues | | | |
| Jacob, Irène | 210007729 | N | DELINQUENT | | \$0.50 | 1 | | | |
| Jacob, Maurice | 210007720 | N | DELINQUENT | 1 | \$13.50 | 2 | | | |

Click **Close**.

Books By Mail

If your library mails items to users, the books by mail functionality allow items placed on hold to be marked for shipment. Based on policies set up by the system administrator, shipping charges can be calculated based on selected mail options.

The *Place Hold* wizard offers options to flag items designated to be mailed to users. The *Mail Items* wizard will be used to charge/checkout an item to a user via Books by Mail.

To place a hold that will be mailed to a user

Open the Holds group of wizards and click the **Place Holds wizard**.

1. Search for the user who is placing the hold.
2. Search for the item they want to place on hold.
3. Select the **Mail Item to User** check box.
- 4.

The screenshot shows the 'Place Hold' wizard interface. It includes a 'Notes' section with the following information:

- Name: McAvoy, James Andrew
- Id: 210002100
- Group ID:
- Profile name: HOMEBOUND...

Below the notes, there is a section for 'Identify User' with the following details:

- Street: 13343 Manchester Rd.
- City, state: Des Peres, MO
- Zip: 63131
- Phone: 314-984-5055

The 'Identify Item' section shows:

- Item ID: 310000255

The 'Hold Info' section includes:

- Mail Item to User
- Pickup at: ARROWOOD
- Expires: 5/21/2011
- Delivery Method: (dropdown menu)
- Estimated shipping cost:
- Comments:
- Date suspended:
- Date unsuspended:

At the bottom, there are two sections for configuration:

- Level/Range:** Level: Copy Title; Range: Library Group System
- Recall status:** Allow Recall No Recall Recall now (RUSH)

Buttons at the bottom include: 'Get User Information', 'Get Item Information (b)', 'Place Hold', 'Place Hold for Another User (g)', and 'Close'.

5.

Using the dropdown, select the **Delivery Method**.

Hold Info

Mail Item to User

Pickup at: ARROWOOD

Delivery Method: USPS

Comments:

Date suspended:

Expires: 5/21/2011

Estimated shipping cost: \$3.00

Date unsuspended:

The cost is automatically assessed based on policies

Make any other necessary selections.

Click **Place Hold**.

6. Click **Close**.

7. Once an item has been placed on hold, staff will use the *Mail Item* wizard to check out the item to the user.

To check out a book to be sent by mail

1. Open the Special group of wizards and click the **Mail Items wizard**.

2. Scan the barcode of the item.

3. Do one of the following:

- If the user already has an existing package scheduled for mailing, the Shipping Package Already Exists dialog box displays the user ID, the user's name, the tracking number of the existing package, and the existing package information. The current item can be added to an existing shipping record by clicking **Yes**, or you can create a new shipping record by clicking **No**. If **Yes**, the existing Tracking Number will appear.

Shipping package already exists.

Add this item to existing shipping package?

Shipping package for:

User ID: 210002100

User name: McAvoy, James Andrew

Tracking number: 6000 1830 0003 6479

Created: 11/22/2010,12:33

Mail service: USPS

Cost: 3.00

Yes No

- If there is no existing package, type a new Tracking Number. The maximum length of this field is 80 characters. When the tracking number is entered, the **Confirm Shipment** button is activated and is the default action when you press Enter.

Type in a comment, if desired.

Click **Check Out Item To User**.

- 4.
- 5.

| Item ID » | Title | Date Due | Tracking Number | Estimated Shippin... |
|-----------|-----------------------|------------|----------------------|----------------------|
| 310000255 | America transforme... | 12/27/2010 | 7008 1830 0003 64... | \$3.00 |

- 6.

If you are ready to ship the package, click **Confirm Shipment**.

- 7.
- 8.
- 9.

Click **OK**.

Click to print the packing slip or click **Close**.

Click **Close**.

Exercises

Exercise 1. User Creation

Begin by creating two users. Be sure to treat them as you would a real patron at your library. What information would be requested?

Note down the User ID and name of each user.

Exercise 2. User Editing

After editing the second user, you realize you've made a mistake. Open the user record again and edit something on the User Address tab.

Note down the User ID and name of each user.

Exercise 3. Check Out with No Card

User 1, from Exercise one, comes up to the desk to check out a book. However, he/she has forgotten his/her library card. Check out two items to User 1.

- Does he/she have ID on him?
- What forms of ID does your library accept?
- Do you use any Alternative IDs?

Note down the Titles.

Exercise 4. Check Out with Modified Due Date

User 2, from Exercise one, would like to checkout a few items, all with "holiday" in the subject. However, she/he will be on vacation and would like to check the book out until the 15th of next month.

- There may be more than one way to go about this. If you know in advance you would use the helper, but if they mention it after the checkout has occurred, there is a right-click option.
- Be sure to use title with "holiday" as the Subject.

Note down the titles.

Exercise 5. Renewal

User 1 has called on the phone and would like to renew his/her books.

- There are two renew wizards. Which is best for this situation?

Exercise 6. Holds

User two would like to checkout a book. However, he can't find it on the shelf.

- Is it available? Be sure to verify first.
- Since the item is checked out, he/she would like to get in line for it.
- Create the hold.
- Repeat for an item that is on the shelf.

Note each of the titles you place holds on for later use.

Exercise 7. Brief Title Add

A user asked you to borrow a book from another, outside institution. It has arrived. Create a Brief record for the title.

- Remember to always check the property settings (should it be shadowed?).
- Title: Giving Back
- Author: Sharon Abunch
- Owning Institution: SD Library

Exercise 8. Checkout the ILL

Checkout "Giving Back" to User 1.

Exercise 9. Blanket Hold

User one just came running in. She is getting a late start on the literature assignment. She needs two books with "holiday" in the subject. However, they are all checked out by the more prompt students. She will happily take the first two that come in.

- What is the best hold wizard for this process?
- Look at the Display User wizard, after creating the blanket hold, to see how that worked. Maybe check some in to follow it through.

Exercise 10. Onshelf Holds

It's time to fill holds for patrons. Pull up the list of onshelf items. Then, trap them to put them on the holds shelf.

Exercise 11. Cancel a Hold

Cancel the first hold you placed in exercise 5.

Exercise 12. Clean the Holds Shelf

While you are at it, go through the current hold shelf and pull those that have been cancelled.

Hint: This is handled with Reports.

Exercise 13. Lost

User 2 has lost one of the items checked out earlier.

- Mark it lost.
- Create the bill.
- Take a partial payment.

Exercise 14. Display User

User 2 has returned arguing that the bill was paid in full. How can you look that up?

- While you are at it, she would like a print out of the details of her account. Do you see a helper that can do this?

Exercise 15. Paying Bills with the Right-click Menu

You've given User 2 enough evidence that only a partial payment was made. They would now like to pay the remaining bill balance.

Instead of opening the Pay Bills wizard, can you find a way to pay this bill from the Display User Wizard?

Exercise 16. Transits

What is in Transit to your library?

Exercise 17. Lost Card Checkout

User 1 has lost his/her card, but would like to check out an item. Mark the user's card as lost. Then, complete a checkout.

Exercise 18. Ephemeral

There are many ways to use the Ephemeral wizard. Do any of the below that will be used by your library. Use the Brief Title wizard to create a single title for this purpose. You may need more than one copy under that title in some cases. If you will be tracking what went, but not who it went to, then you will also need a generic user.

Option 1: You wish to keep track of a box of a "take one/leave one" box.

- Do you care to know who took one? Or only that one was taken?

Option 2: You wish to keep track of who is taking the tax forms, but don't want to check them out.

- In this case, you want to know who is taking them, as other counties may have to pay when their patrons come to your library for services.

Option 3: You wish to track computers or photocopies.

- Do you care to know who took one? Or only that one was taken?

Exercise 19. Mark Item used

As you walk around the library, picking up after patrons, be sure to mark them as used, to help show that the library is used, even when items do not leave the library. You will need to use the helper to find titles for the purpose of this exercise.

Exercise 20. Modifying Due Dates and Holds

A user has called on the phone to say that she needs to go into hospital unexpectedly for a week. How would you handle her concerns about checkouts becoming overdue, and holds becoming available while she is out of action?

Exercise 21. Duplicate a User

A patron has just approached the Circulation Desk and asked that a patron card be issued for his/her son. They live in the same home, share a phone number, and have the same last name. Quickly create this card.

Exercise 22. Change Hold Pickup Library

User two just called back to ask that the Pickup Library be changed to the branch across town.

Exercise 23. Checking User's place in Hold Queue

User 2, from Exercise one, would like to know how soon they will get their hold. Check their place in line by accessing the hold queue for the item that they placed a hold on in Exercise five.

Exercise 24. Printing a List of Checkouts for a User

A user has asked for a list of items she currently has checked out. She would also like to see any bills and holds that are on her account as well.

Hint: There is a Helper for this.

Exercise 25. New User Checkout and Hold

A patron approaches the circ desk and places a book on the circ desk. He says that he wants to it check out and place a hold on a different book that you do not have on your shelves. He also says that he is not yet a member of the library. Register him as a user, check the item out to him, and place a hold on the item he wants on hold. (You can use any item in the database for the checkout and hold.)

Answers

Exercise 1. User Creation

1. Open the **User Registration wizard** (Users group).
2. Create a memorable **User ID**.
3. Select PUBLIC or another patron **Profile**.
4. Click **OK** (or Enter key).
5. Select the appropriate **Library** (the user's home library).
6. Enter the patron's address details in the **Addresses tab**.
7. **Save**.
8. Repeat for User 2

Exercise 2. User Editing

1. Open the **Modify User wizard**.
2. In the **User ID** box, enter the User ID for User 2.
3. Hit enter on your keyboard, or click the **Get User Information** button.
4. Move to the **Addresses** tab.
5. Edit or add information in one of the fields.
6. Click **Save**.

Exercise 3. Check Out with No Card

1. Since the user wants to Check Out, open the **Check Out wizard**.
2. Ask if the user has lost his/her card. Or, if he/she just doesn't have it. In this case, it was forgotten, so you need the **User Search Helper**.
3. Search for User 1.
4. Select User 1.
5. Now, since you may be doing these exercises on a test system, rather than having your database, find a few items to check out using the **Item Search Helper**. However, in real life, you would get to scan the item's barcode.

**You will be working with these items later, so be sure to note the title or item ID.*

Exercise 4. Check Out with Modified Due Date

1. Open the **Check Out wizard**.
2. Enter User 2's User ID; and click Enter.
3. If the user told you in advance, use the **Date helper** now.
4. Check out a few items, using the **Item Search helper**.
5. If the user tells you after the checkout, the flow would be:
 - i. Find an item to check out using the Item Search Helper and check it out.
 - ii. **Right-click** on the checked out item and select **Modify Due Date**.
 - iii. Set the date to the 15th of next month.

** You will be working with these items later, so be sure to note the title or item ID.*

Exercise 5. Renewal

1. Open the **Renew User wizard**.
2. Either look up User 1 or enter User 1's ID.
3. Select **All**.
4. Check **Unseen** (because it is over the phone).
5. Click **Renew**.

Exercise 6. Holds

1. Open the **Place Hold wizard**.
2. Enter **User 2's ID**.
3. Search for a title to place on hold, using the **Item Search helper**.
4. Click **Place Hold**.
5. Repeat this process on at least one title that is on the shelf (not checked out).

Exercise 7. Brief Title Add

1. Right-click on the **Add Brief Title wizard**.
2. Ensure "**Shadowed**" is checked.
3. Click **OK**.
4. Open the **Add Brief Title wizard**.
5. Enter the desired info.
 - **Title:** Giving Back
 - **Author:** Sharon Abunch (you may also wish to note the Owning Institution: SD Library for ILLs)

- You can choose the appropriate item details. Be sure to note your Item ID for the next exercise.

6. **Save.**

Exercise 8. Checkout the ILL

1. Open the **Checkout wizard**.
2. Scan the **User's ID**.
3. Enter the **Item ID** from Exercise 6.

Exercise 9. Blanket Hold

1. Open the **Blanket Hold wizard**.
2. Enter User 1's ID.
3. Enter 2 for the **number of items needed**.
4. Click **OK**.
5. Look up at least three items to add to your list.
6. Click **Add to List**.
7. Click **Place Hold**.
8. Check your work in the Display User wizard.

Exercise 10. Onshelf Holds

1. Open the **Onshelf Holds wizard**.
2. Pretend you have gone out to grab the titles there. Click **Trap** on a few titles.

Exercise 11. Cancel a Hold

1. Open the **Remove User Holds wizard**.
2. Enter the **User ID** from one of the User's you placed a hold for above.
3. Select an Item; and click **Remove Holds**.

Exercise 12. Clean the Holds Shelf

1. In real life, the Clean Holds Shelf Report will already be run for you to grab from the Finished Reports wizard. This report looks for items that are on the holds shelf that have been there too long, passing the expiration date. The report that finds those is "Expire Available Holds" report.
 - i. This may or may not be the case on the system you are working on. If it is not in the Finished Reports wizard:
 1. Open the **Schedule New Report** wizard.
 2. Open the **Circulation group** of reports.

3. Run the **Expire Available Holds report** (open the report and click “Run Now”).
 4. Run the **Clean Holds Shelf Report** (open the report and click “Run Now”).
2. Open the **Finished Reports wizard**.
 3. View the **Clean Holds Shelf Report**.
 - i. Copy a barcode from this report.
 4. Enter the barcode from the report in the **Trap Holds wizard**.

Exercise 13. Lost

Option 1

1. Open the **Mark Item Lost wizard** (Items group).
2. Search for the item, using the **Item Search Helper**.
3. When the billing options appear, ensure they are correct (edit as needed).
4. Click **Create Bill** (DO NOT PAY THE BILL, yet).

Option 2

1. Open the **Display User wizard**.
2. Enter **User 2’s ID**; and click **Enter** on your keyboard.
3. Open the **Checkouts tab**.
4. **Right-click** on the item reported to be lost.
5. Select **Mark Item Lost** from the menu.
6. Confirm that the Lost item amount and processing fees are correct according to your library’s policies.
7. Click **Bill User**. (DO NOT PAY THE BILL, yet).

Exercise 14. Display User

1. Open the **Display User wizard**.
2. Enter **User 2’s ID**; and click **Enter** on your keyboard.
3. Open the **Bills tab**.
4. Click the **glossary** (the dotted underline under the amount owed).
5. Finally, print the user’s data, by clicking the **print helper**.

Exercise 15. Paying Bills with the Right-click Menu

1. Continuing with steps 1-3 from the exercise above, **right-click** on the bill.
2. Select **Pay Bills** from the menu that displays.

3. Note the remaining bill amount.
4. Enter that amount in the **Payment field**.
5. Select a **Payment type**.
6. Click the **Pay Bills** button.

Exercise 16. Transits

1. Open the **Pending Transits wizard** (In-Transit Items group).
 - i. Note that you can use the helper to view items in transit to other branches.
2. To take something out of Transit, it is recommended you do so by scanning it into the **Receive Transit wizard** or the **Discharge wizard**.

Exercise 17. Lost Card Checkout

1. Open the **Check Out wizard**.
2. Open the **Lost Card Helper**.
3. Locate the existing user's account.
4. Enter a new **User ID**.
5. Complete a checkout, using the Item Search helper.

Exercise 18. Ephemeral

Option 1:

1. Create a Title called "Take One / Leave One" with the **Add Brief Title wizard**.
 - i. Make the ID easy to remember, such as TAKE1
2. Create a generic user Named "Took One"
 - i. Make the ID easy to remember, such as TAKE1
3. Open the **Ephemeral wizard**.
4. Enter the User from #2.
5. Enter the Item ID from #1.
6. Enter the number of books taken.
7. Click Checkout Item to User.

Option 2:

1. Create a Title called "Tax Forms" with the **Add Brief Title wizard**.
 - i. Make the ID easy to remember, such as TAXES
2. Open the **Ephemeral wizard**.
3. Enter User 1's ID.

4. Enter the Item ID from #1.
5. Enter the number of forms taken.
6. Click Checkout Item to User.
Option 3: This depends on whether you care to track who the item was checked out to. The steps will either match option 1 or 2.

Exercise 19. Mark Item used

1. Open the **Mark Item Used wizard**.
2. For the purpose of this exercise, open the **Item Search helper**.
3. Locate and select an item.
4. Click **Mark Item Used**.

Exercise 20. Modify Due Dates and Holds

1. Open the **Modify Due Dates wizard** in the Special group and look up User 2.
2. Click on the **Select All** and **Apply Same Due Date checkboxes**.
3. Using the gadget next to the Due Date field, select the appropriate due date and click OK.
4. Click on **Modify User Due Dates**.
5. Next, click on the **Modify Holds for User wizard** in the Holds group and look up User 2.
6. Click on the **Select All** checkbox; and click **Modify**.
7. In the **Date Suspended and Date Unsuspended fields**, enter the range of time when the user will be away from home. Click **OK**.

Note that these functions could also be done for one item at a time using the right-click menu in the Display User wizard.

Exercise 21. Duplicate a User

1. From the Circulation Toolbar > Users group, open the **Duplicate User wizard**.
2. Search for the parent's name (any user in the system).
3. From the search results, highlight the parent's record and select **Clone/Copy User**.
4. Enter a new **User ID** for this record.
5. Complete the information that is unique or different from Parent (PROFILE, PIN, Demographics, email).
6. Click **Save**.

Exercise 22. Change Hold Pickup Library

1. If you have an existing hold, skip to step 2. If not, place a hold.
2. From Circulation Toolbar > Users group, click on **Display User**.
3. Display the user from step 1.
4. Navigate to the **Holds tab**.
5. **Right-click** on the hold just placed.
6. Select **Modify**.
7. Using the **Pickup at dropdown** choose a different library for pickup
8. Click **Okay**.

NOTE: There are other ways this could be done, including the use of the Modify Holds for User or Modify Holds for Item.

Exercise 23. Checking User's place in Hold Queue

1. This can be seen from the Reorder the Hold Queue wizard (not all libraries choose to enable this wizard). Or, from the **Display Title Holds wizard**.
2. Search for the title placed on hold in Exercise Six.
3. Find User 2 on the list, count how many patrons are ahead of them in the queue.

Exercise 24. Printing a List of Checkouts for a User

1. Click of **Display User**.
2. Using either the User Search Helper in the upper left hand corner or typing in the **User ID** in the appropriate field, display User 1 or User 2.
3. Once the User's account is displayed, select the **Print helper** [Printer Icon].
4. Check the boxes next to list of checkouts, list of bills, and list of holds.
5. Press Print.

Exercise 25. New User Checkout and Hold

Register a new user/Cko item:

1. Open **Checkout wizard**.
2. Open **Register New User helper**.
3. Register user, selecting the Public user profile, and adding all the information you would normally add for one of your patrons.
4. Click **Save**.
5. Use the **Item Search Helper** to select an item for checkout. You can use any item for this exercise.

Place hold for user:

1. Open **Place Hold Wizard**.
2. Use the **User Search helper** to pull up the patron you just registered.
3. Use the **Item Search helper** to search for an item to hold.
4. Select **Title level** and **System Range** hold.
5. Click **Place Hold**.

