SirsiDynix®

SirsiDynix Symphony Training Guide

Circulation

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Additional copies of this document can be downloaded from the SirsiDynix Client Care website, clientcare.sirsidynix.com.

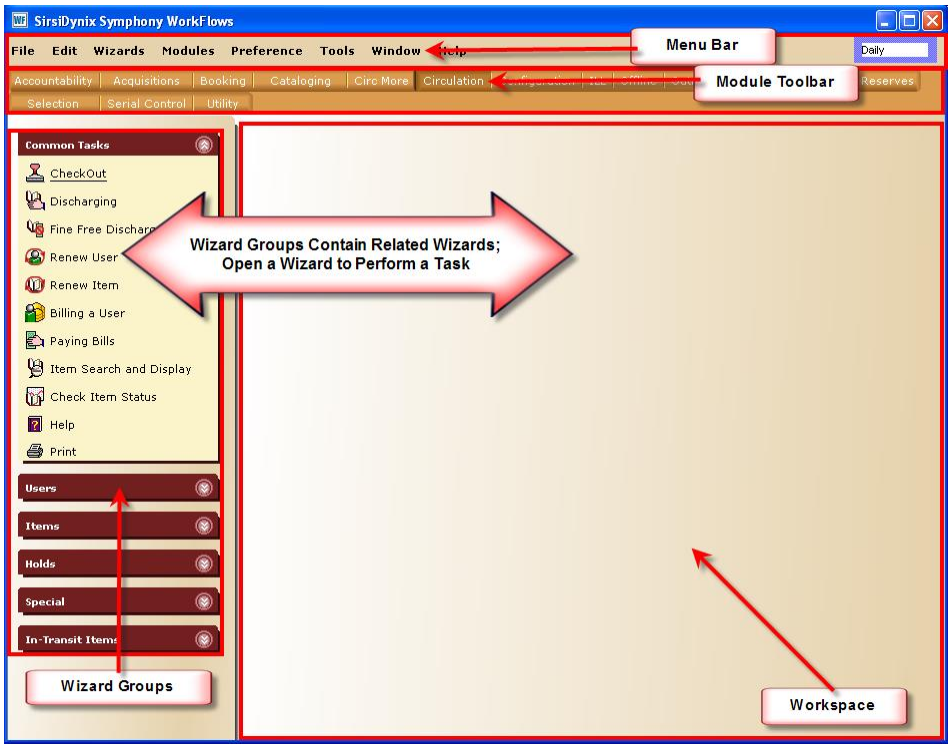
Table of Contents

Introduction

The SirsiDynix Symphony Basic Circulation Manual consists of six sections. Below is a short summary of each section:

- Working with User Records. Outlines the steps taken to create, copy and modify user records, confirm address information, mark user cards lost and removing user records. User status is also discussed.
- Circulating Materials. Details the steps for checking out, renewing and checking in materials, as well as apply and modify due dates.
- Working with Bills, Fines, and Payments. Discusses how bills are created, automatically and manually, and how they are paid.
- Working with Holds. Introduces how to create, display, modify, remove holds, and reorder a hold queue, as well as create recalls and blanket holds. Trapping holds though onshelf lists is also covered.
- Working with Items. Discusses how to create brief records on the fly, change Item IDs, mark items lost, missing, and claims returned.
- Special Processes. Introduces how to mark items used, receive in transit items, create circulation statistics for ephemeral items, and suspend user privileges .

Teminology/Navigation



These are the parts of the Symphony screen, as called out in the preceding screen shot:

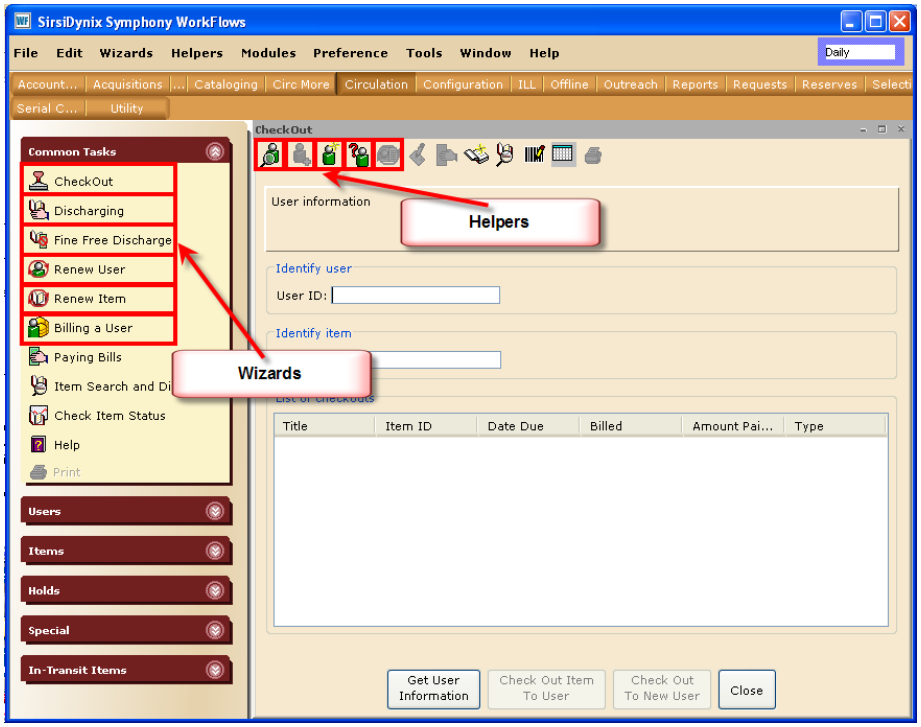
- Module Toolbar. Grants access to available modules. Only modules relevant to your job display. Move between modules by clicking on the module toolbar.
- Menu Bar. Provides context-sensitive tools to perform tasks. The system has built-in redundancies (menu bar, buttons, field information, key commands) to perform tasks.
- Wizard Groups. Organizes wizards into grouped sets that perform related workflows. The arrow in the upper right-hand corner opens or closes the group. Double click on a wizard to open it on the workspace.
- Workspace. Displays the wizards that have been opened. If your system is profiled to do so, windows open one on the top of another so you can have many wizards open at once, moving freely between them.

Wizards and Helpers

Wizards and Helpers are tools used to conduct work within SirsiDynix Symphony. Wizards are labeled icons—the icon visually represents what the tool

does, and the label describes the tool's function. A Helper displays a balloon tooltip when you hover over the icon.

Each entry in a Wizard Group is a wizard. A Helper displays at the top of a workspace in a Helper bar. (A Helper has the same name and label as its equivalent wizard). A Helper is a Wizard that has conveniently been placed inside of a wizard so that related workflows can be addressed from a single reference point.



The *Check In* wizard is the tool you would use when performing Checkin-related workflows. A *User Registration* wizard or Helper is the tool you would use to create a new user on the system.

A library administrator has the ability to organize toolbars and change the labels of wizards. This customization of the SirsiDynix Symphony user interface lets you organize SirsiDynix Symphony for specific groups of people or those performing a specific job function.

Help Files (F1)

The SirsiDynix Symphony system comes with an extensive set of online Help files. You can access Help files by right clicking on a wizard and selecting "Help", from the Help menu, or by pressing the F1 key when within SirsiDynix Symphony.

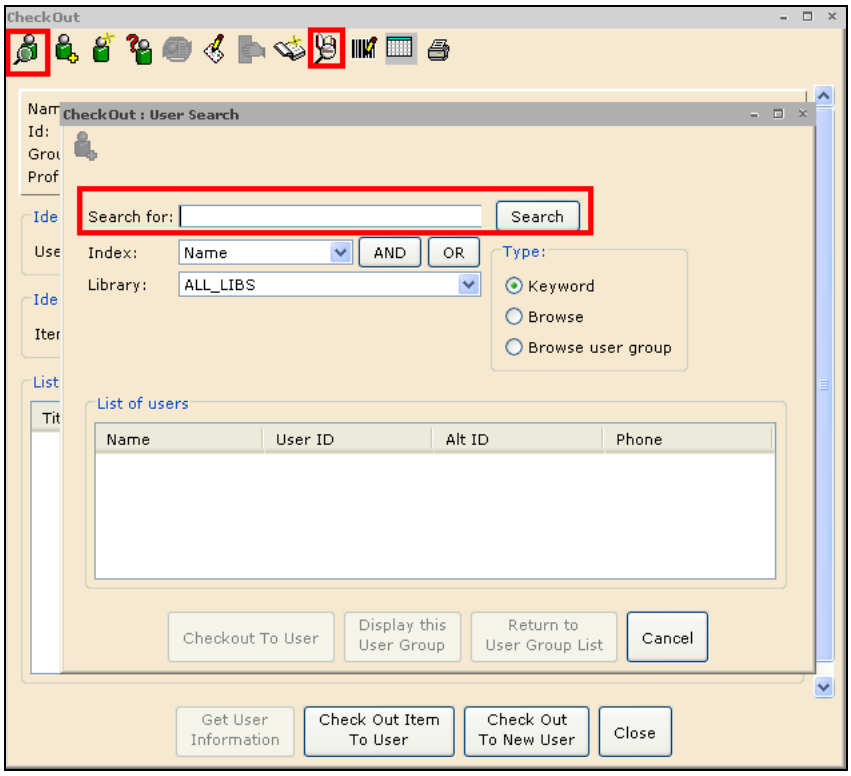
Searching Basics

Searching for records within the SirsiDynix Symphony client is straight forward. This section reviews the basics of searching for and selecting records in SirsiDynix Symphony.

To search for a user record:

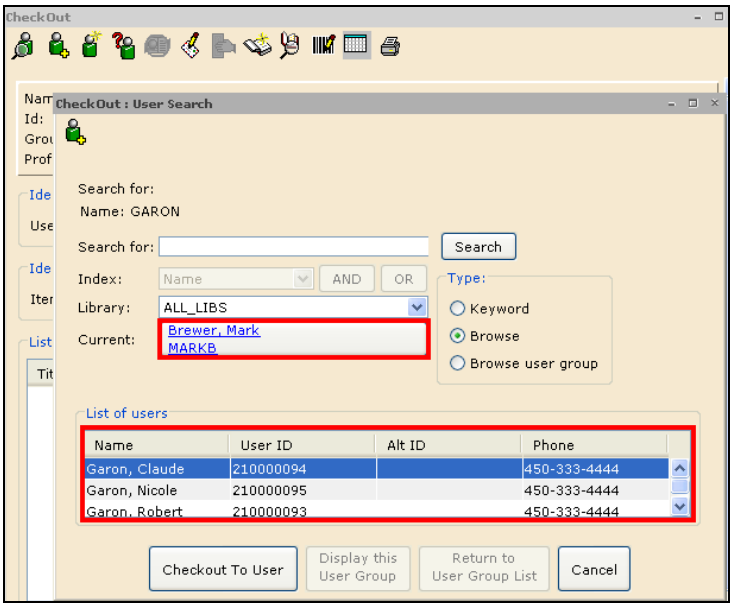
1. Open the ***Checkout*** **wizard** (or any wizard that includes the User ID field).

2. Click on the ***User Search*** **helper** at the top of the Checkout window. A user search pop-up like this one displays:



3. Enter a search term, refining it with any of the special search functions, and click **Search**.

The system displays the results of your search. When there are multiple matches to your search, they display as a list in the lower part of the window:



Notice that the most recent (current) borrower displays by default. The names that matched your search entry display in list form.

4. Select the desired user.

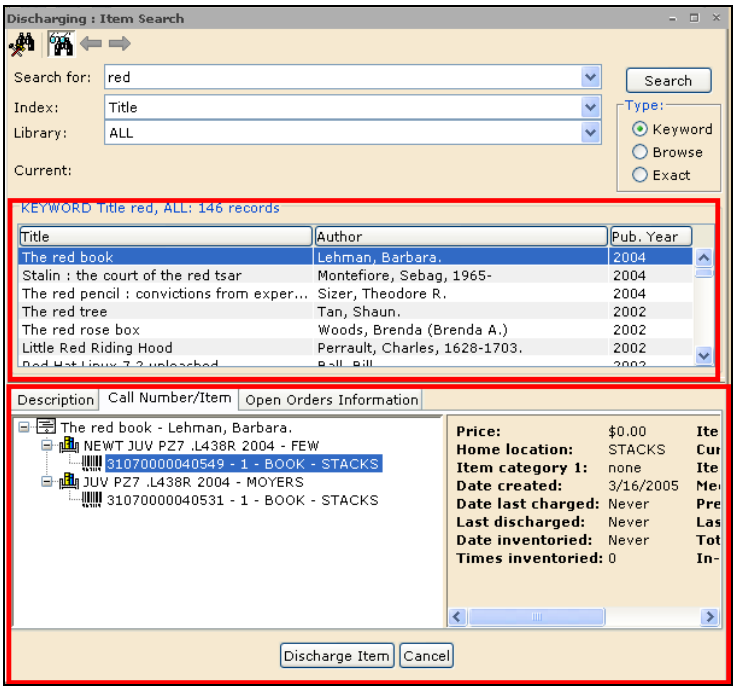
To search for an item record:

1. Click on **the *Check In* wizard**. (or any wizard that has the Item ID field)

2. Click on the ***Item Search* helper**. An Item Search window displays:

3. Enter a search term, refining it with any of the special search functions, and click **Search**. Within the Search window there are options to specialize a search by index, library, or type.

Your search results display:



Matches display in the upper window, while bibliographic, call number, and item information display in the lower window.

4. Select the desired item; and click **Discharge Item** to check the book back in. The system automatically directs you if there is block, fine, transit, or other information for the item.

Working with User Records

In this section, we will introduce the tasks related to user records, such as creating, copying, modifying, and deactivating.

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.

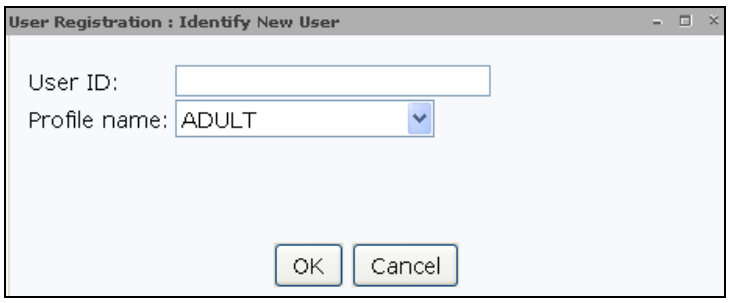
SirsiDynix Symphony also utilizes user records to assign a status or condition to an item. For example, some libraries will check out items that need to be removed from the collection to a "DISCARD" user record.

Creating a User Record

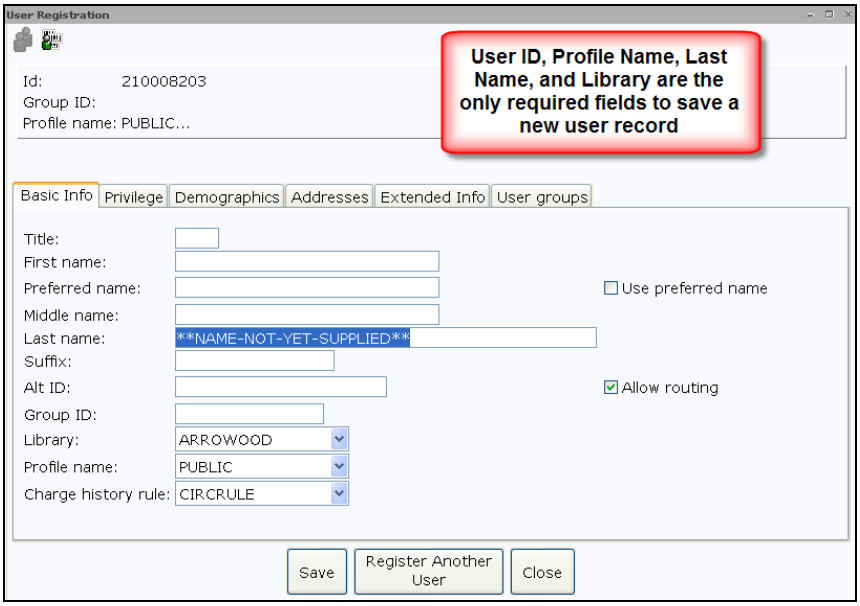
The *User Registration* wizard is used to create a new user record in your library.

To create a new user:

1. Navigate to the **Circulation toolbar**.
2. Open the **Users group** of wizards.
3. Click the ***User Registration* wizard**.
4. Select a Profile Name using the dropdown, if necessary. This determines a user's privileges like loan period and fine rate.

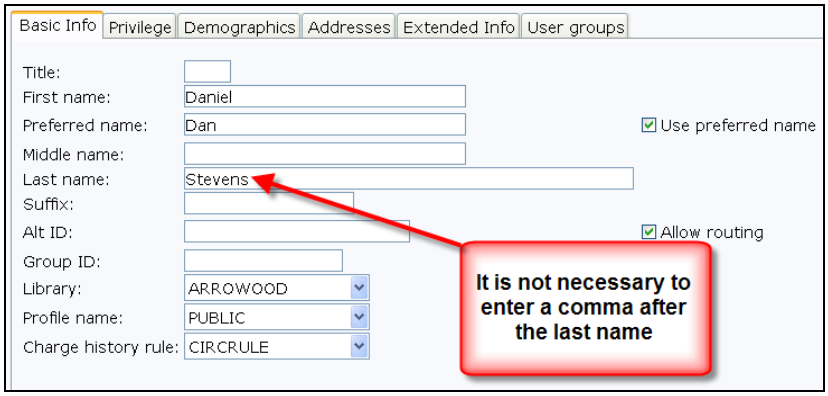


5. Scan the library card barcode into the User ID field, or type the User ID and select **OK**.



6. In the **Last Name** field, type in the user's last name.
7. In the **First Name** field, type in the user's first name.
8. Enter a preferred name and/or middle name, if necessary.

9. 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.



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.

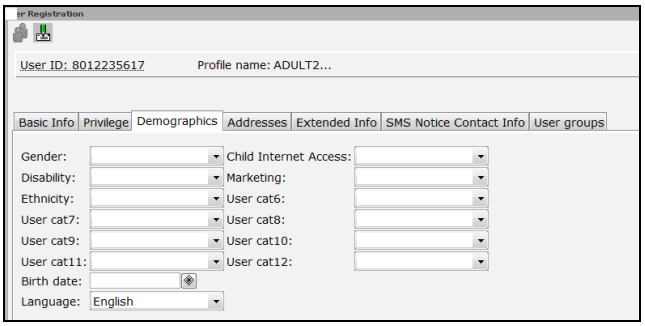
11. Enter a Group ID if necessary. An example is to use the name of a homeroom teacher (e.g., JOHNSON) as a Group ID for all the children's user records. Group IDs can be used to search a group of users or sort notice reports.

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.

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.

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

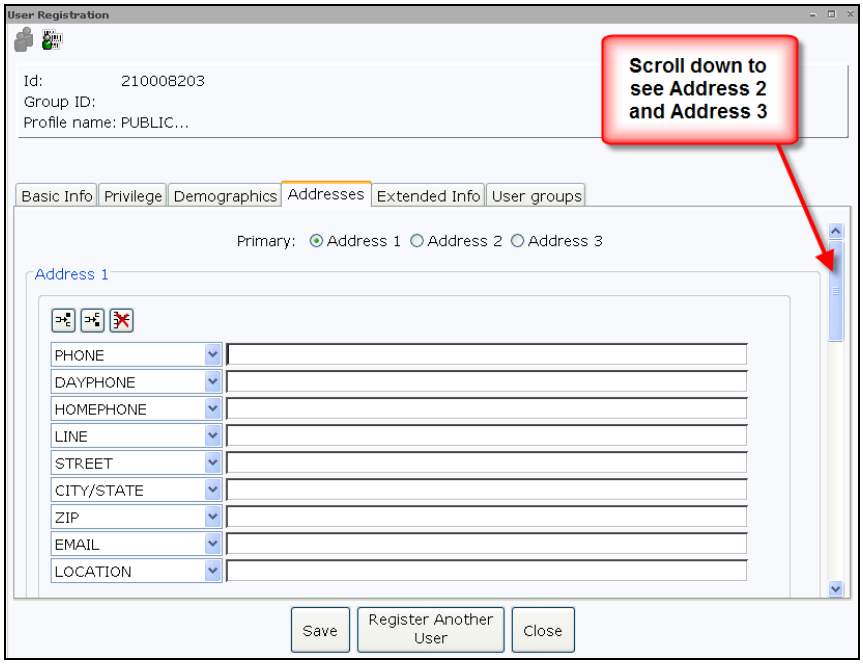


15. Using the dropdown fields, fill in the appropriate user categories. These are used for statistical purposes.

16. To enter the user's birth date, click the *Birth Date* gadget and use the calendar to establish a date. Click **OK**.

17. Use the **Language** dropdown to choose the language this user prefers for receiving notices.

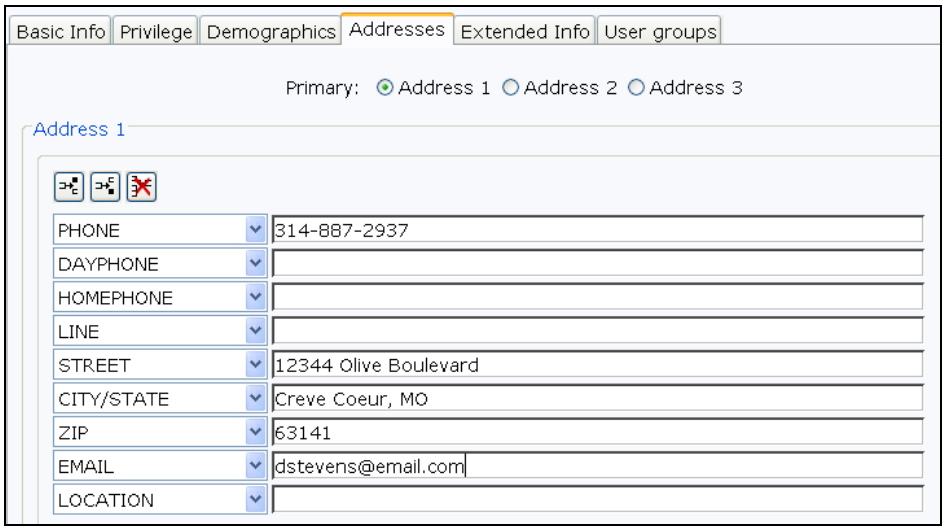
18. Click the **Addresses tab**.



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.



22. Enter any other necessary information in the other tabs provided.

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

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

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

- **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.

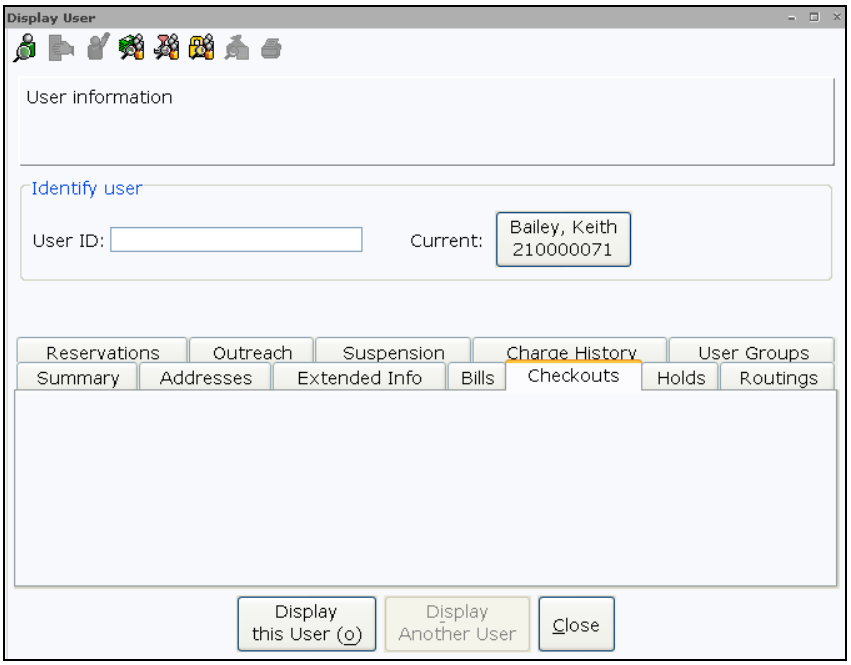
NOTE: User Photo helpers can be enabled. It allows you to load individual patron photos from an image file, capture and save photos from a webcam, or delete an existing photo. Patron photos can also be loaded in a batch. For more information on this, see the Helps for "Update User Photo Helper" and "Batch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

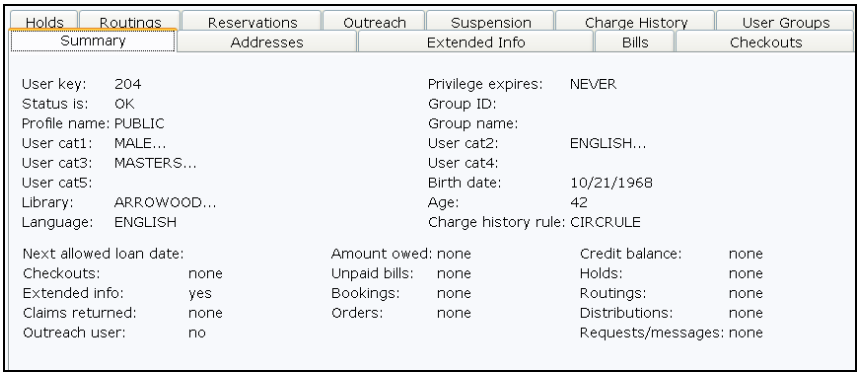
To view a user's record:

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



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

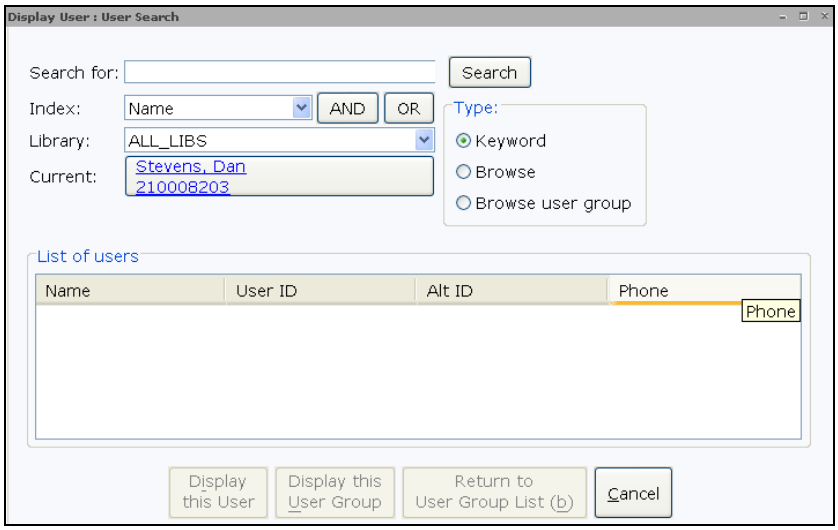
3. Click the **Summary** tab to see the user's activity such as status, profile, and the number of checkouts, bills, and/or holds.



To search for a user:

1. Click the ***Display User* wizard**.

2. Click the ***User Search* helper**. 

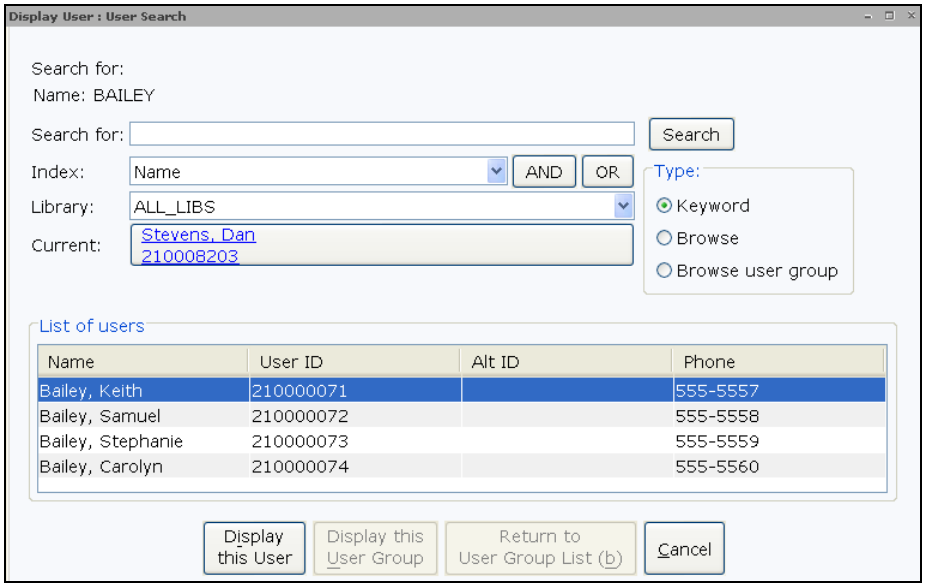


3. In the Search For box, type either a name or a search criterion.

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.



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

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

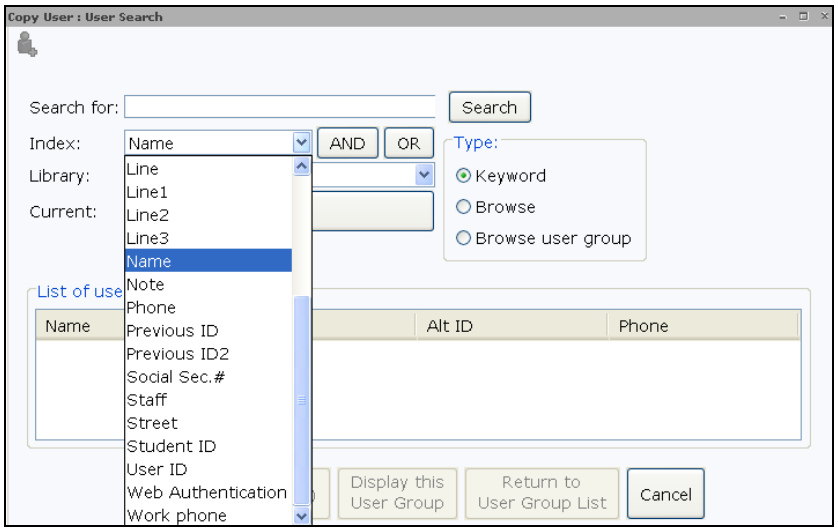
Copying a User Record

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:

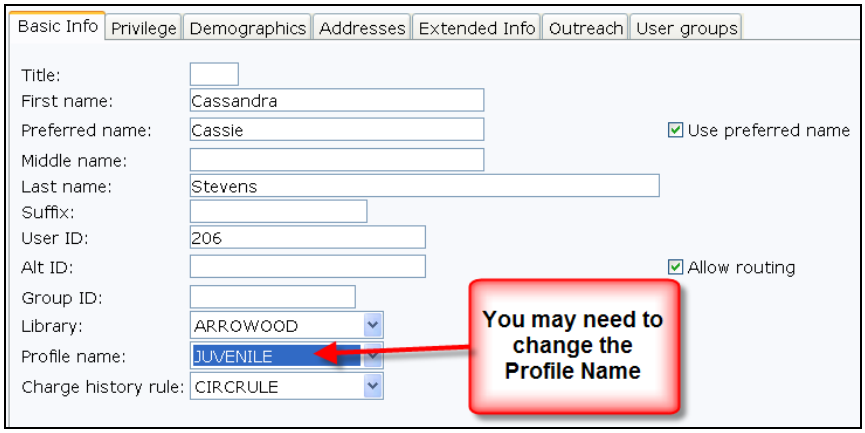
1. Within the Users group of wizards, click the ***Copy User* wizard**.

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



3. 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.

4. 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.

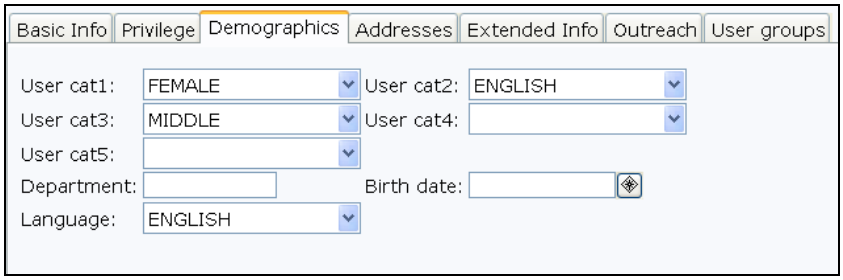


5. Scan or type the User ID for the new user. This will replace the auto-generated User ID initially created.

*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.*

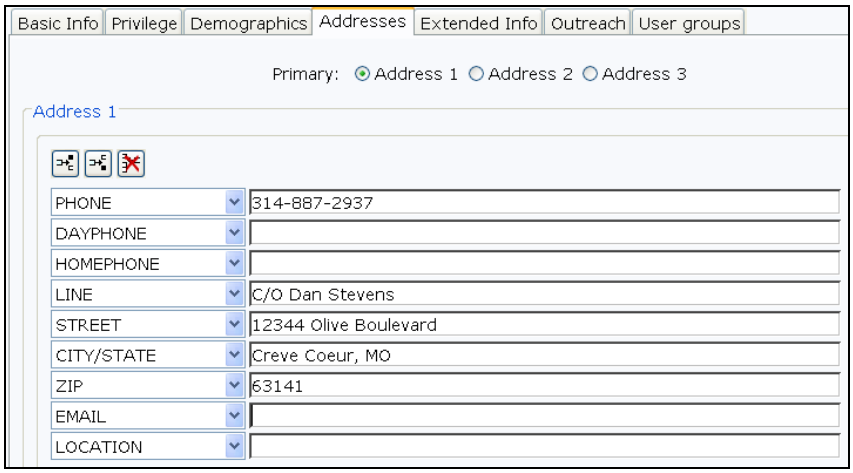
6. Click the **Demographics** tab.

7. Add or edit existing demographics information.



8. Click the **Addresses** tab.

9. Make any necessary changes to the user's address.



10. Click **Save**.

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

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

Modifying a User Record

The *Modify User* 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

Modify User Wizard

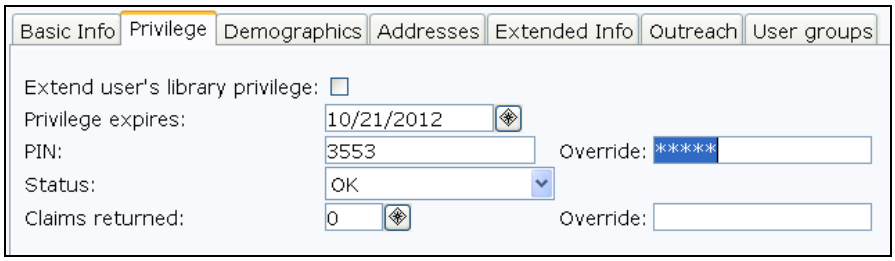
To modify a user's information:

1. Within the Users group of wizards, click the ***Modify 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 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.

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

4. To change the user's PIN, click the **Privilege** tab.
5. Type in the new PIN and enter the appropriate override.



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

6. To add or modify address information, click the **Addresses** tab and make the changes.
7. Make any other necessary changes to the user's record.

8. Click **Save**.

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

- **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.

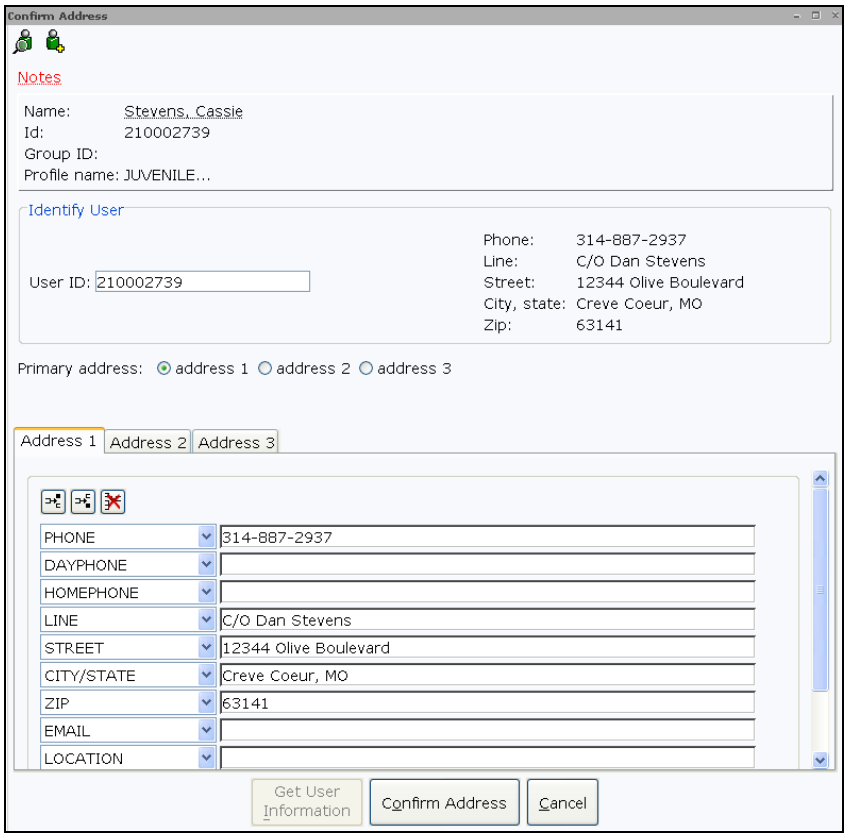
Confirm Address Wizard

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:

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

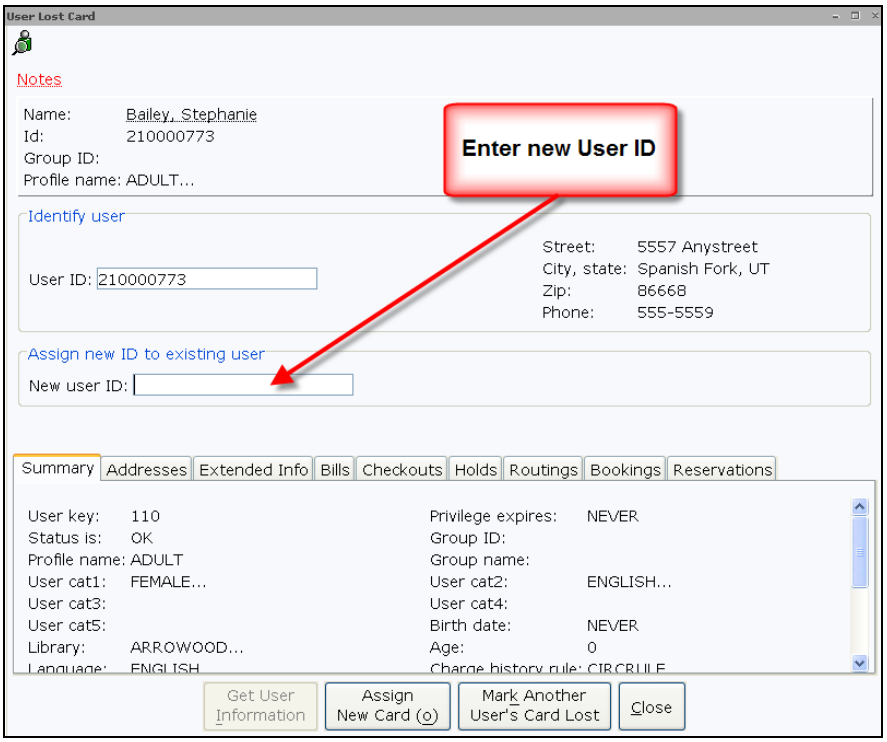
The *User Lost Card* wizard allows staff to inactivate a user's lost card and issue a new card. WorkFlows copies the user information from the lost card to the new card. If the user has checkouts, bills, or holds, these records are transferred to the new card.

To mark a card lost:

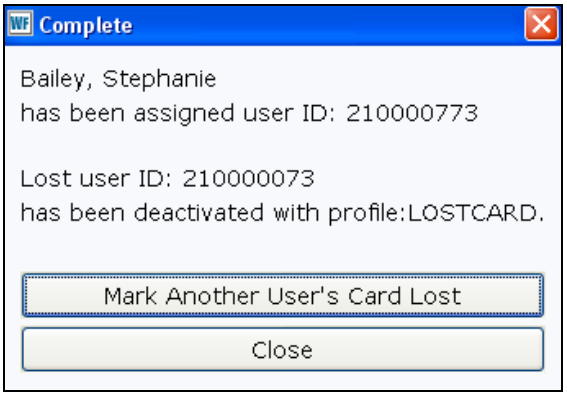
1. Open the Special group of wizards and click the ***User Lost Card* wizard.**

2. Search for the user's existing record.

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

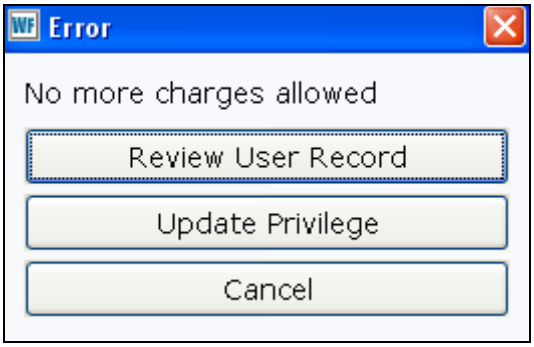


4. Scan the barcode or type the new User ID and click **Assign New Card**.



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

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.

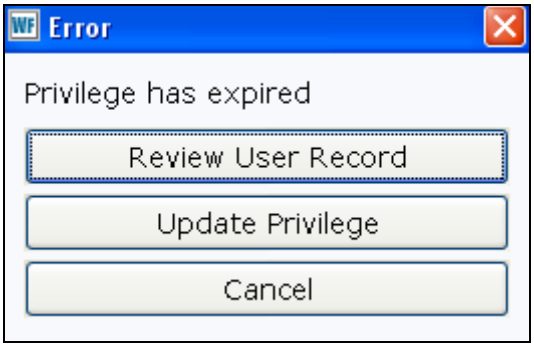
Renewing privilege renews for a full segment of time beginning with the first day of the renewal. The privilege limit is set in the user's Profile policy.

To renew a user's expired privilege during checkout:

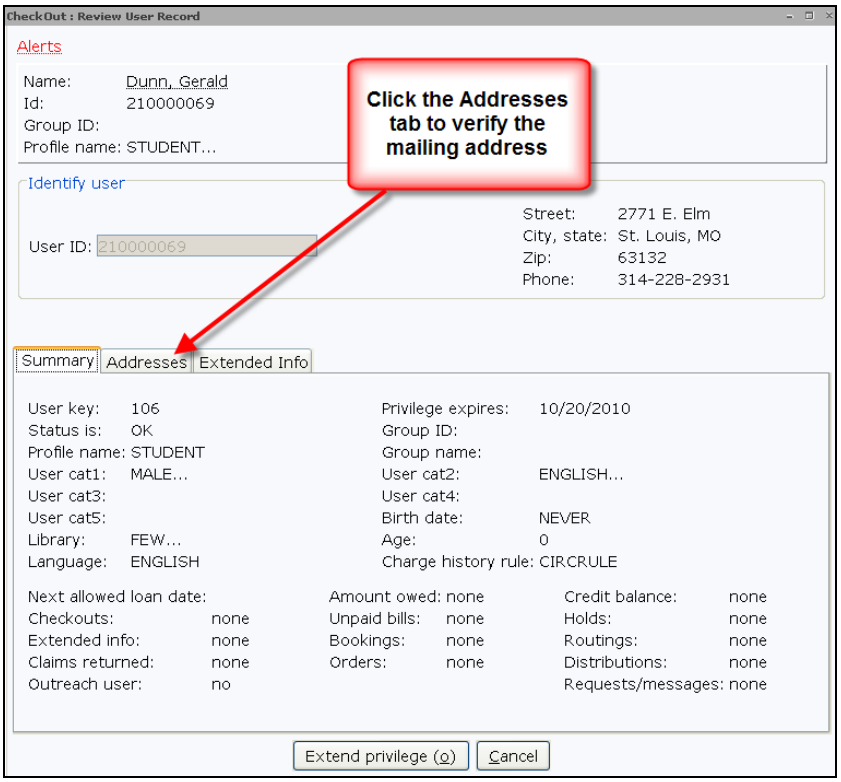
1. Within the Common Task group of wizards, click the ***Checkout* wizard.**

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. 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.

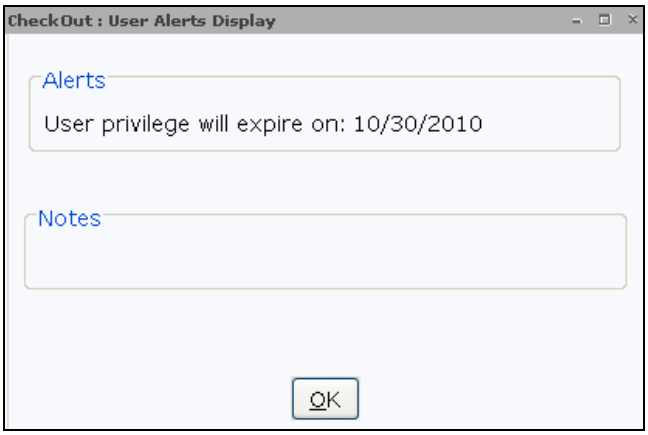
6. Proceed with checking out materials to the user.

To renew a user's privilege that will expire soon:

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

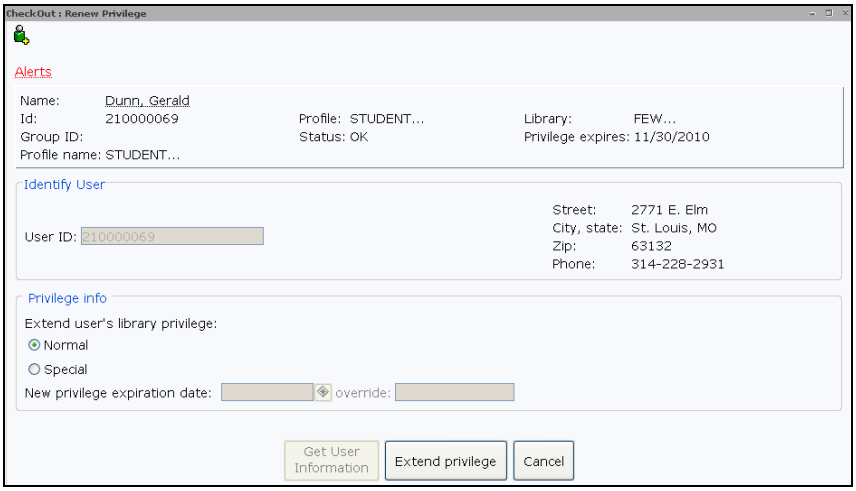
2. Scan the user's barcode or type the User ID and click **Get User Information**. You can also use the *User Search* helper to search for the user.

3. Click **OK**.



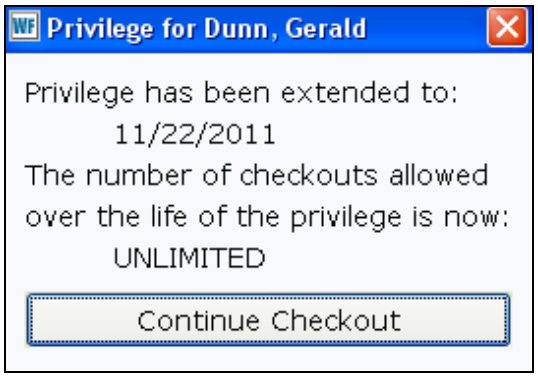
4. Confirm address information using the *Confirm Address* helper.

5. Click the ***Renew Privilege* helper**. 



6. Click **Extend Privilege**.

7. Click **Continue Checkout**.



8. Proceed with checking out materials to the user.

Barring a User

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

To bar a user:

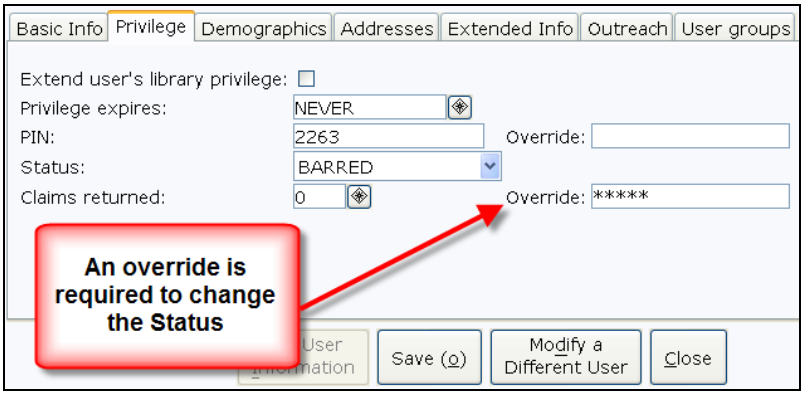
1. Open the Users group of wizards and Click the ***Modify User* wizard.**

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.

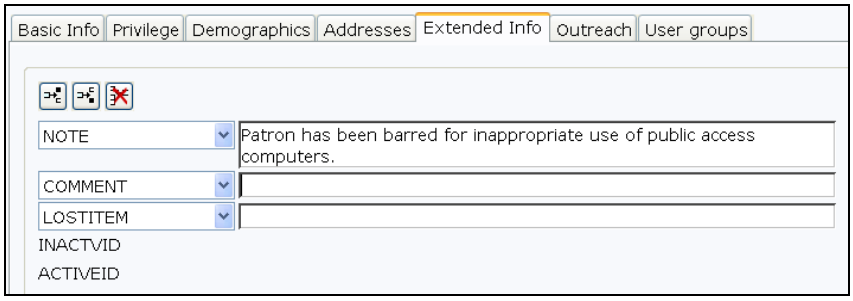
3. Click the **Privilege** tab.

4. Using the **Status dropdown**, select **BARRED** from the list.

5. Type in the **Override**.



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

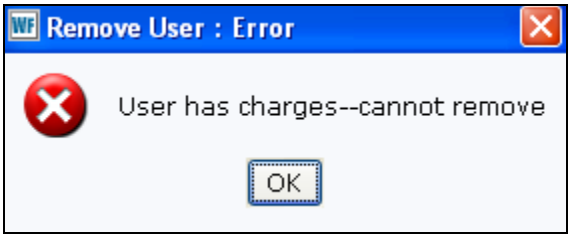


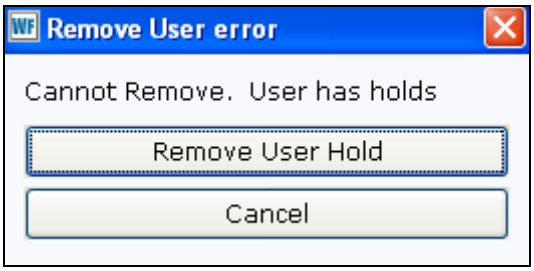
7. Click **Save**.

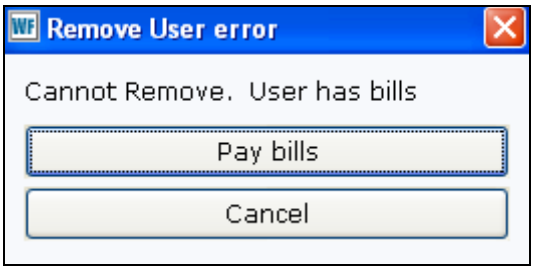
Removing a User Record

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:





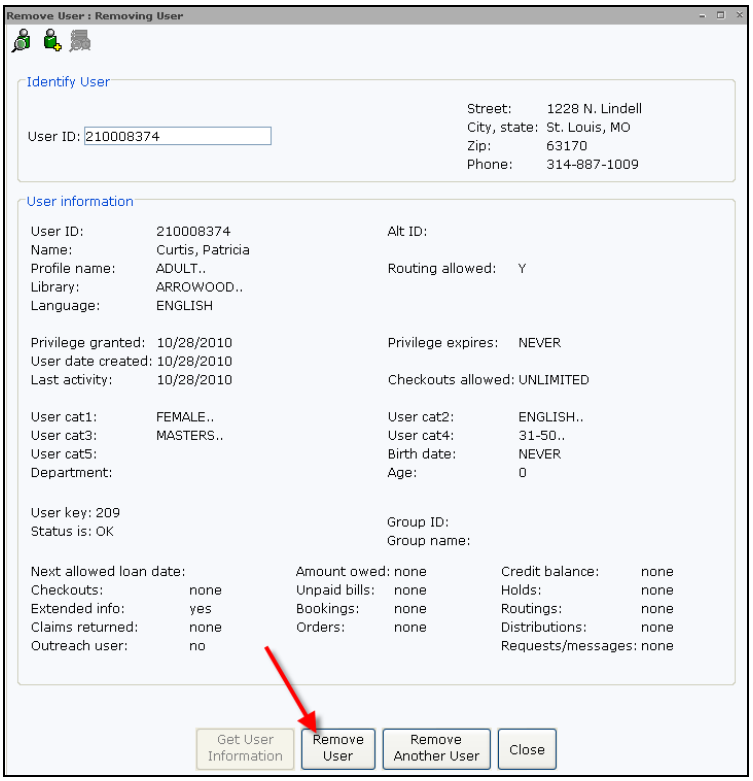


To remove a user record:

1. Within the Users group of wizards, click the ***Remove 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. 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."

Common Circulation Tasks

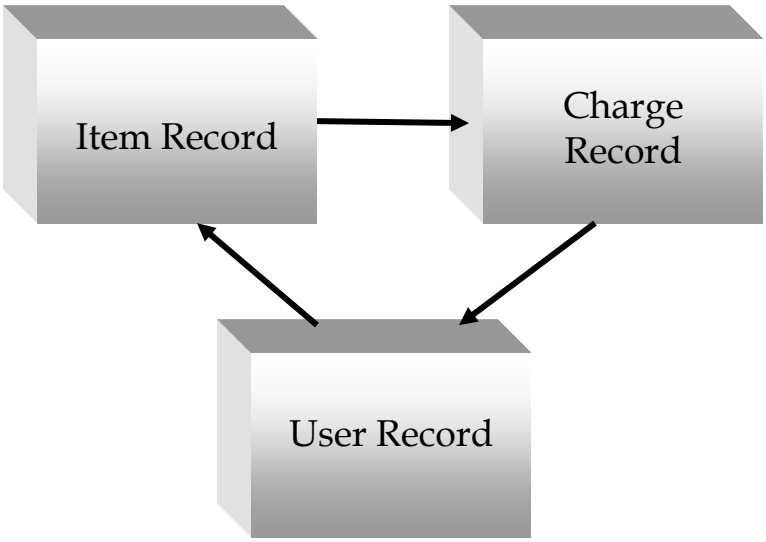
In this section, we introduce the basic tasks of circulating materials—check out, renewal, and checking in. You will also learn how to apply special due dates at check out as well as modifying existing due dates.

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

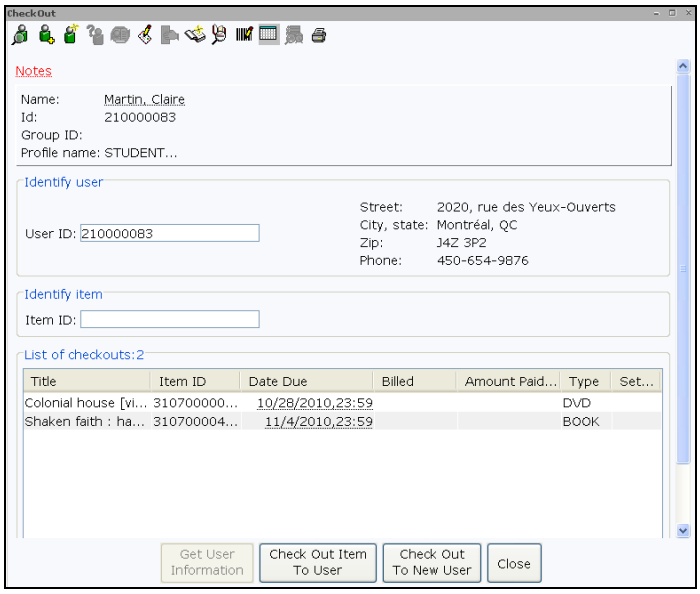
To check out materials:

1. Within the Common Tasks group of wizards, click the ***Checkout* 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. Scan the item barcode in the Item ID field, or type the Item ID and select the **Check Out Item to User**.

4. Continue to check out all of the items to the user.



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

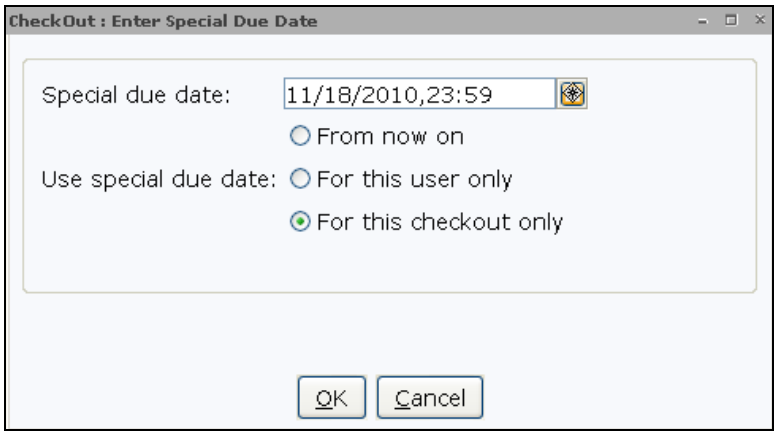
NOTE: If the workstation has a receipt printer, a date due slip will print at this point if they have been configured in the wizard properties.

Applying a Special Due Date

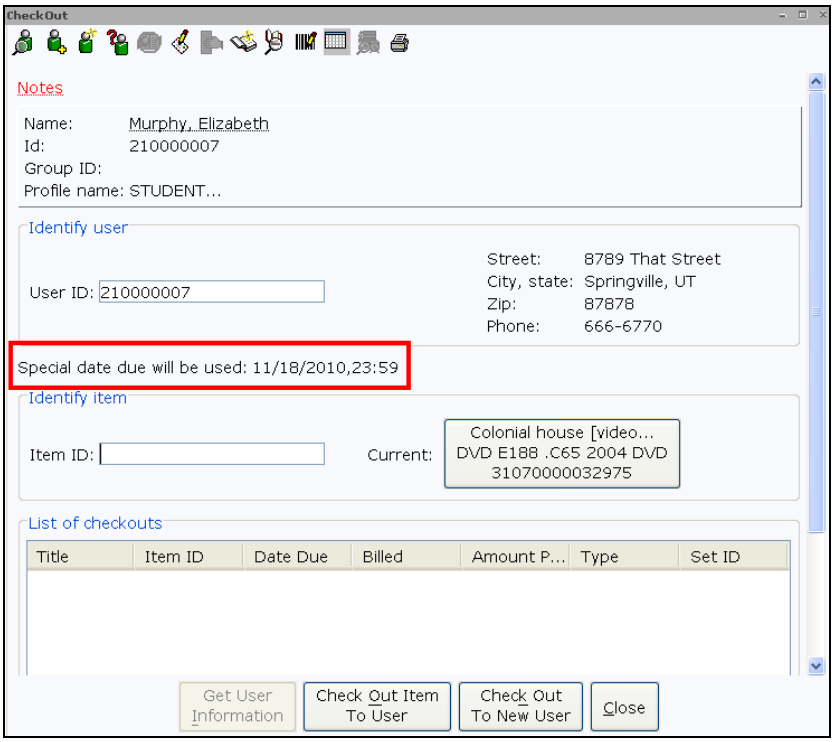
For items that need to be checked out for a shorter or longer length of time, the *Special Due Date* helper will assist staff with this task.

To use a special due date:

1. Click the ***Checkout* 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. Click the ***Special Due Date* helper**. 
4. Click the ***Special Due Date* gadget** and using the calendar select the desired due date.
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. Scan the item barcode in the Item ID field, or type the Item ID and select the **Check Out Item to User**.

9. 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.

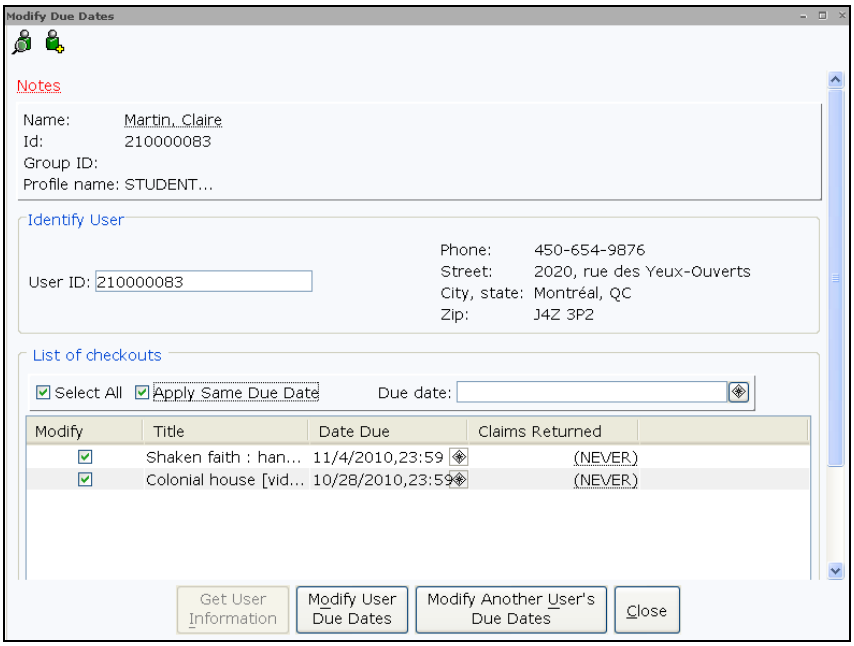
To modify due dates:

1. Open the Special group of wizards and Click the ***Modify Due Dates* 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 of the items, or click the Select All box.

    a. If you Select All, click the Apply Same Due Date check box.



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

5. 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.

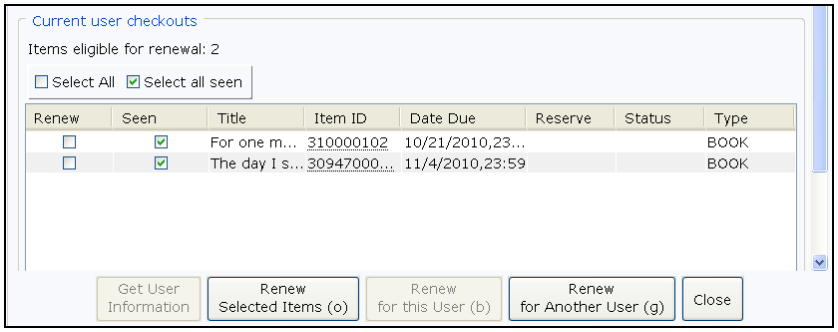
NOTE: If you try to renew items to a user with a BLOCKED status, you can determine the reason for the status and take actions to resolve the user's Blocked status (if desired). You can then continue with the renewal process. For more information, see the WorkFlows online Help file "FAQs: Checking Out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

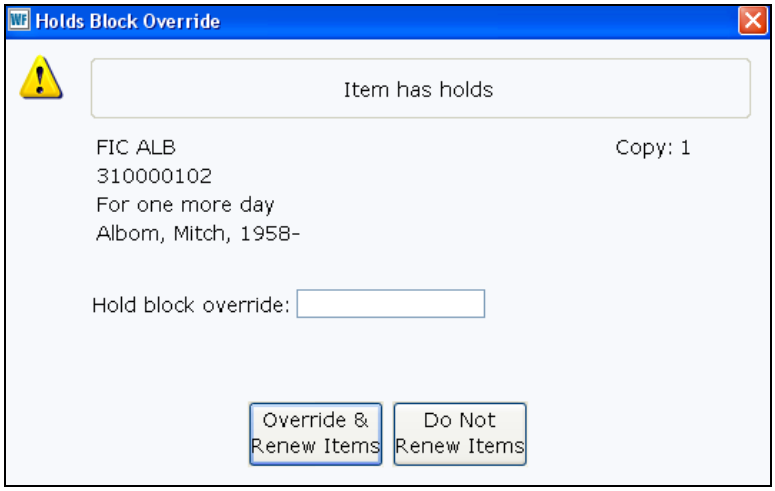
3. Select one or more items to renew, or click the Select All box.

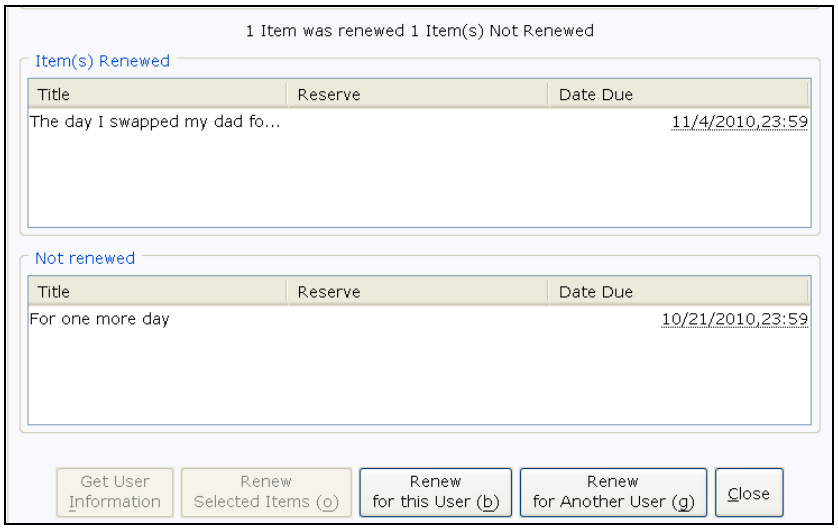


4. If you want the renewal to be recorded as a "seen" renewal (item is physically present for renewal), select the Mark Item as Seen check box, if not already selected.

5. Click **Renew Selected Items.**

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.





6. Click **Close**.

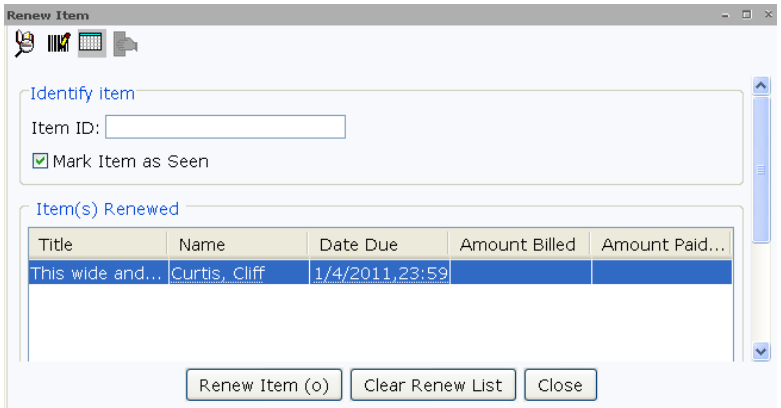
Renew Item Wizard

To renew a single checked out item:

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

2. 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.

3. Scan the item barcode. The item now appears in the Item(s) Renewed list.



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

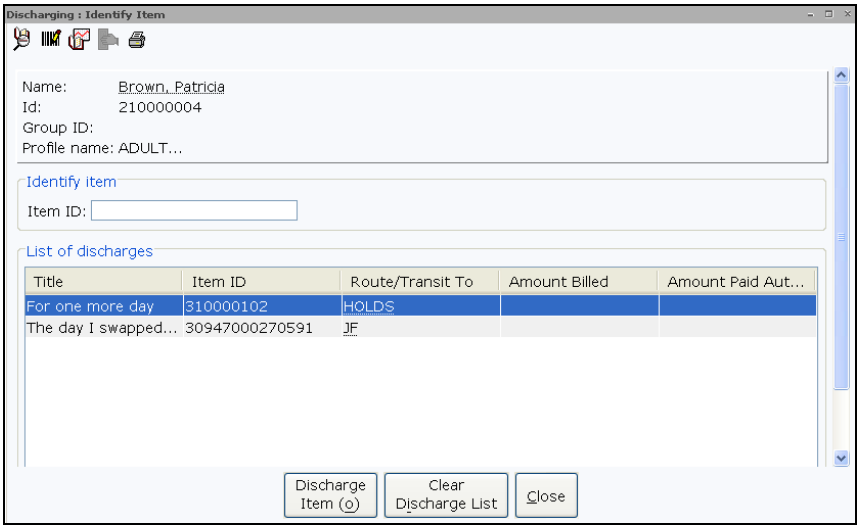
To discharge/check in items:

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

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

*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.*

3. Continue to scan items until all items are checked in.



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

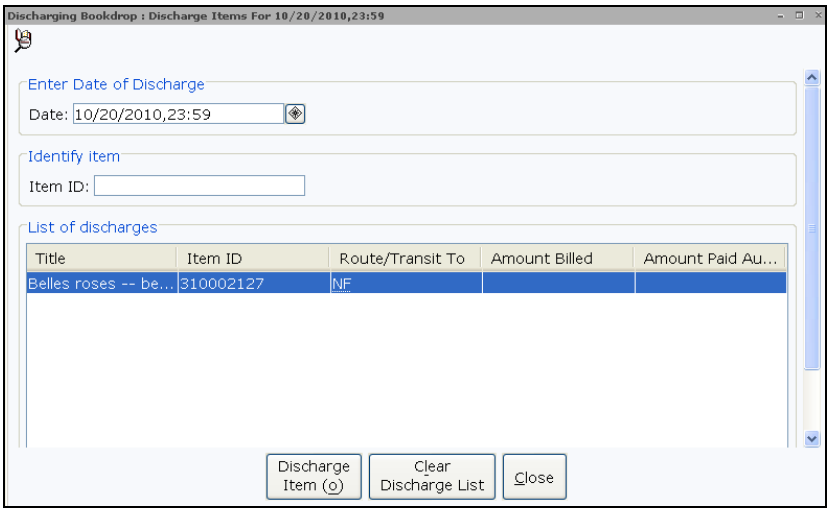
after hours. It also can be used when the library closes for unexpected reasons and due dates were assigned on the days it was closed.

To backdate items when checking in:

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

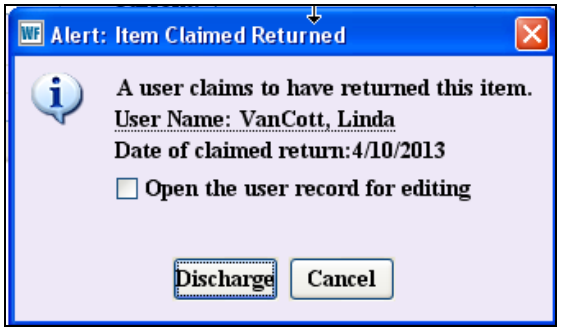
2. Click the ***Date* gadget,** to select an appropriate date.

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



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. Click **Close**.

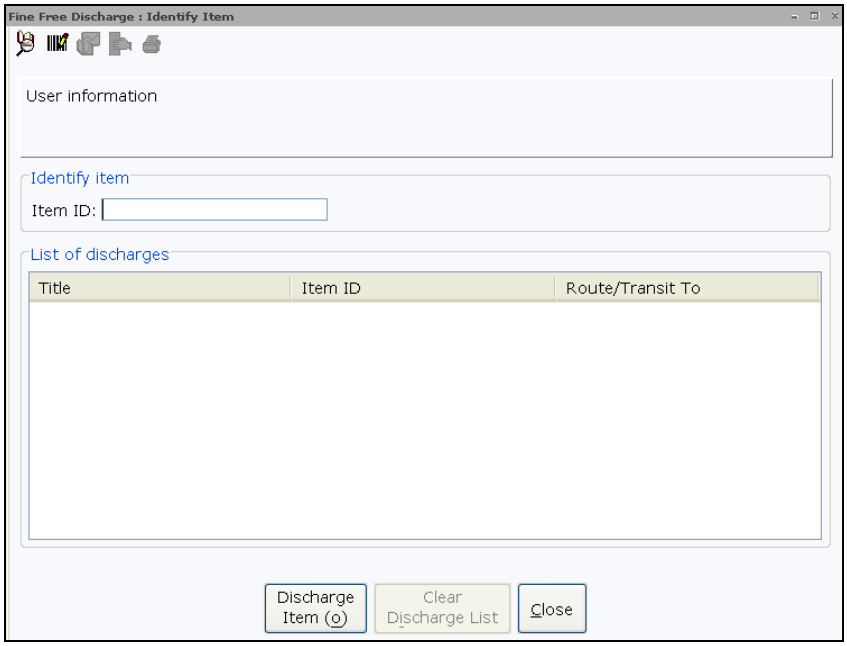
NOTE: System administrator can configure hold slips, hold wrappers, transit slips and/or reshelving slips within the Discharging Bookdrop wizard.

Fine Free Discarge 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:

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



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**.

Working with Fines, Bills, and 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

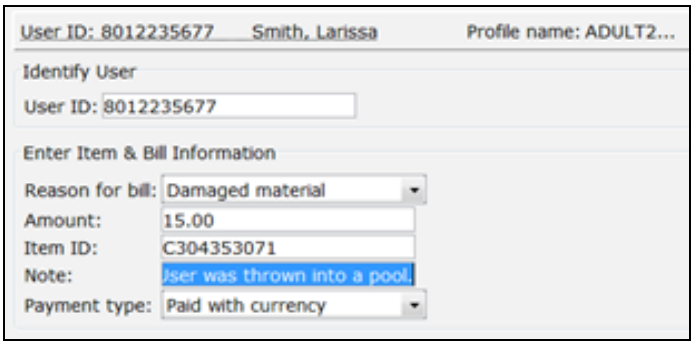
Billing a User

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

To create a bill:

1. Within the Common Tasks group of wizards, click the ***Billing a 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 bill.

4. In the Amount field, type in the amount using the XX.XX format. The currency sign is not necessary.



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. You may also add a note to the bill which can be displayed in other wizards and glossaries that reference this bill.

7. If the user is going to pay the entire bill now, select a Payment Type using the dropdown.

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

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

Viewing Bill History

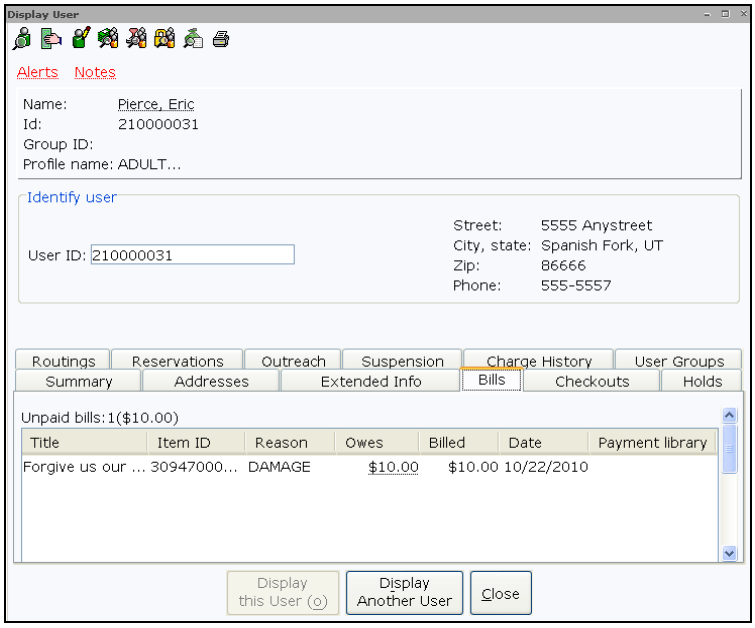
A bill record, when attached to an item, can be viewed in the user record or the item record.

To view bills in the user record:

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

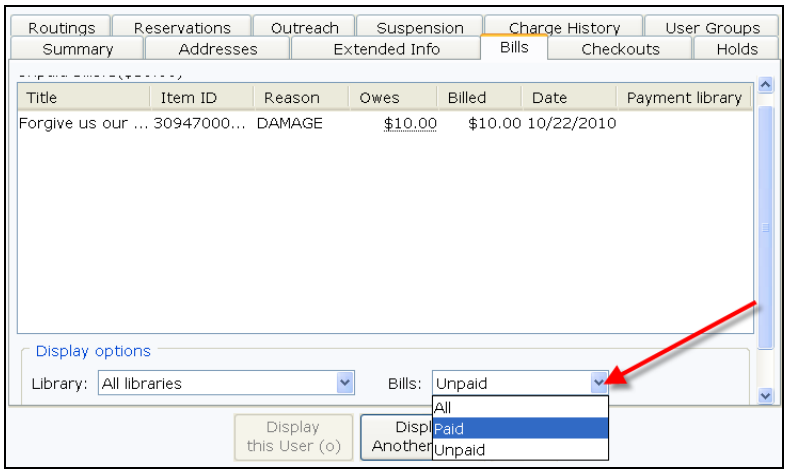
2. Scan or type the user's barcode. You can also use the *User Search* helper to search for the user.

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

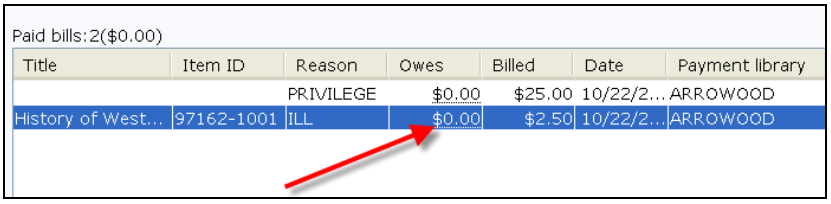


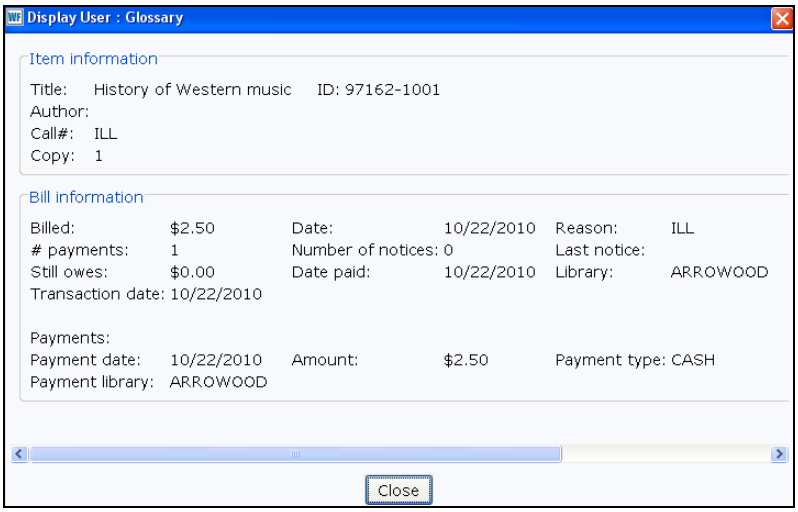
4. To view paid bills, use the **Bills dropdown.**

5. Select **Paid**.



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





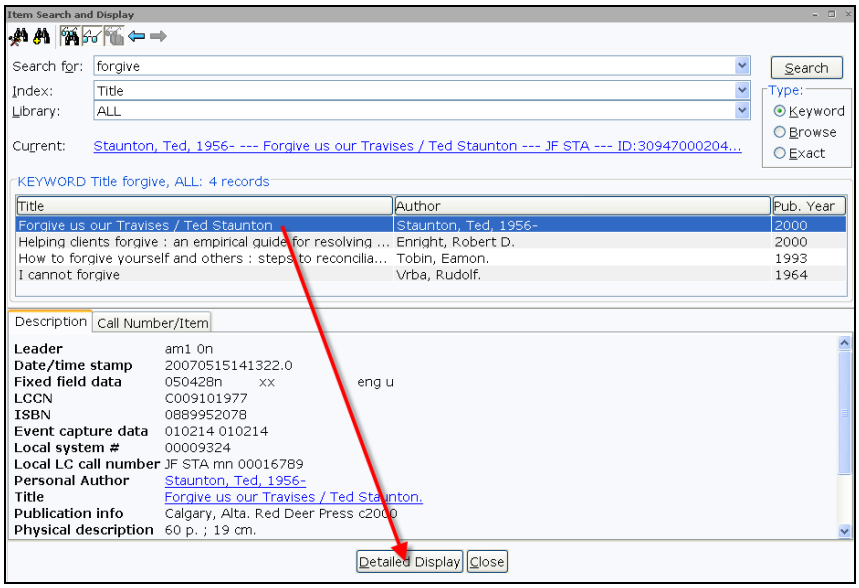
7. Click **Close** to exit the wizard.

To view bills in the item record:

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

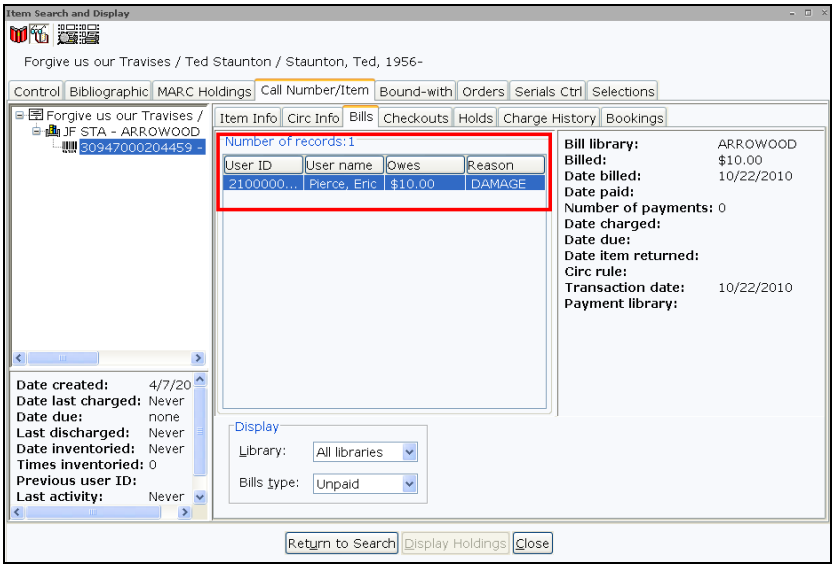
2. Type in your search terms, change Index and Type, as desired, and click **Search**.

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

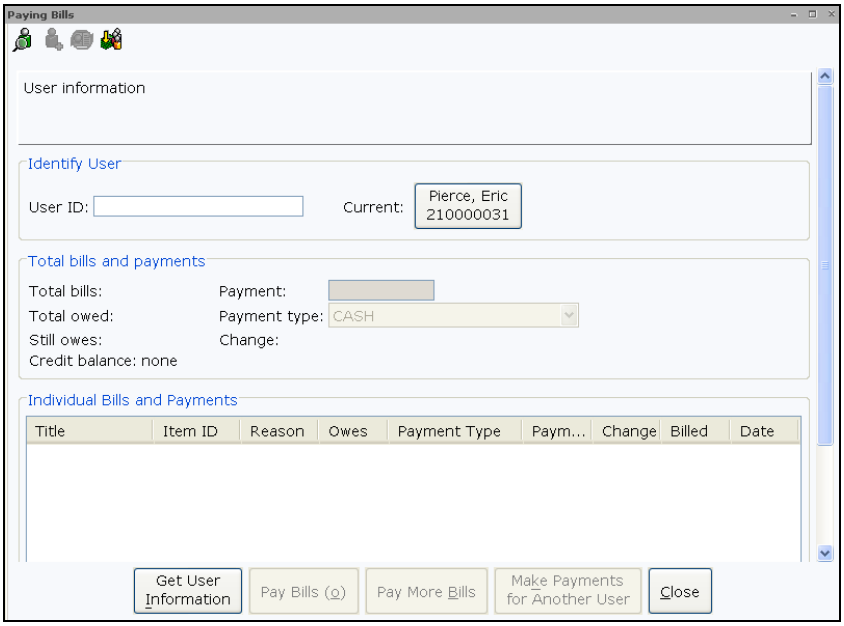
The *Paying Bills* wizard is used to accept payments for a user's current bills. You can apply payments for each individual bill or for the total amount owed, from the oldest bill to the most recent.

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:

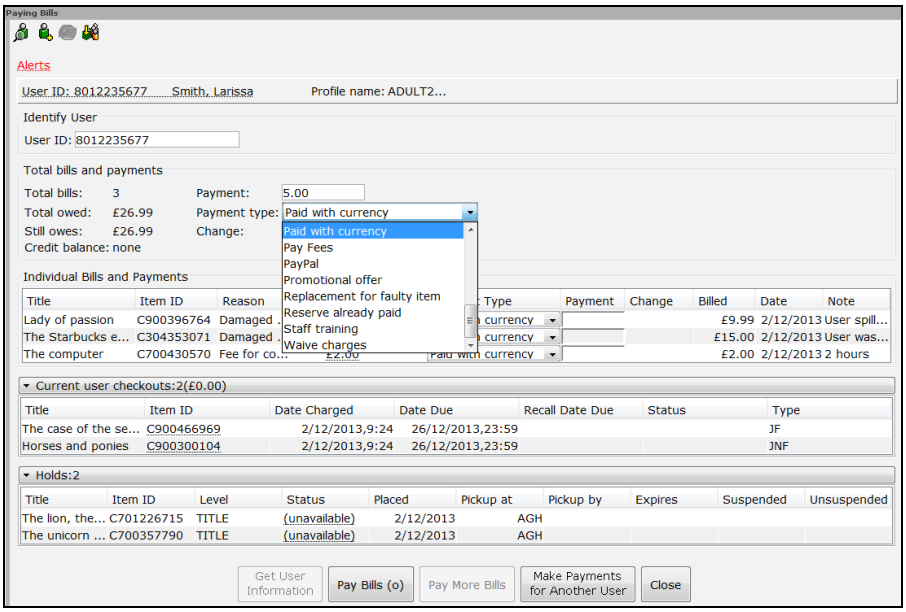
1. Within the Common Tasks group of wizards, click the ***Paying Bills* wizard.**



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 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.

4. 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.

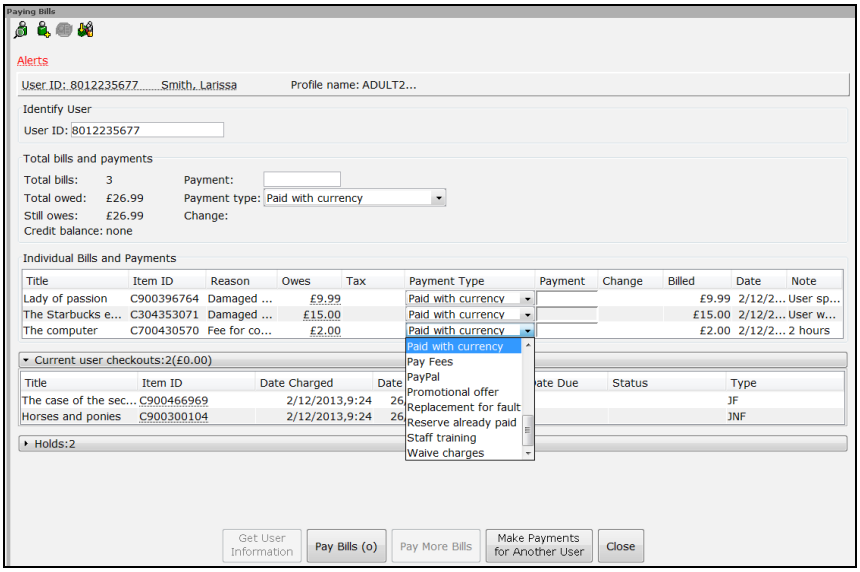
To pay an individual bill:

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

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



5. Click Pay Bills.

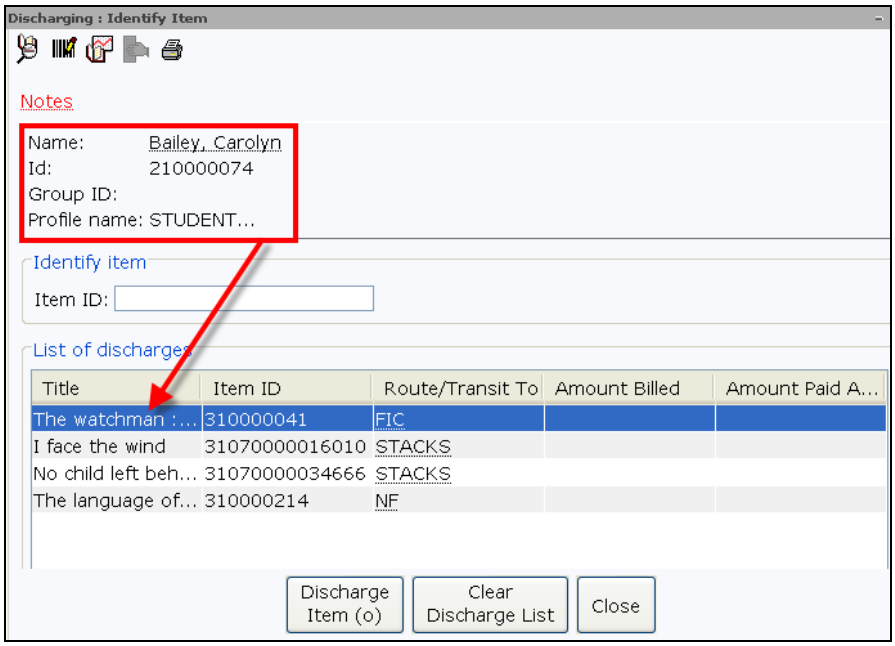
6. After the bill has been paid, select one of the following options:

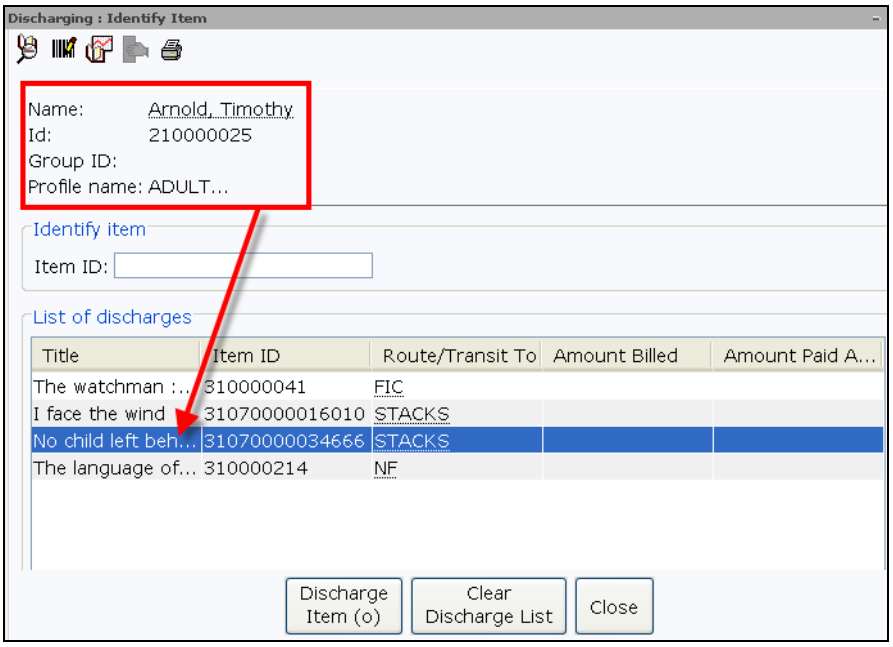
- **Pay More Bills** to continue making payments for this user.
- **Make Payments for Another User** to accept payments from another user.
- **Close** to exit the wizard.

Discharging a Damaged Item

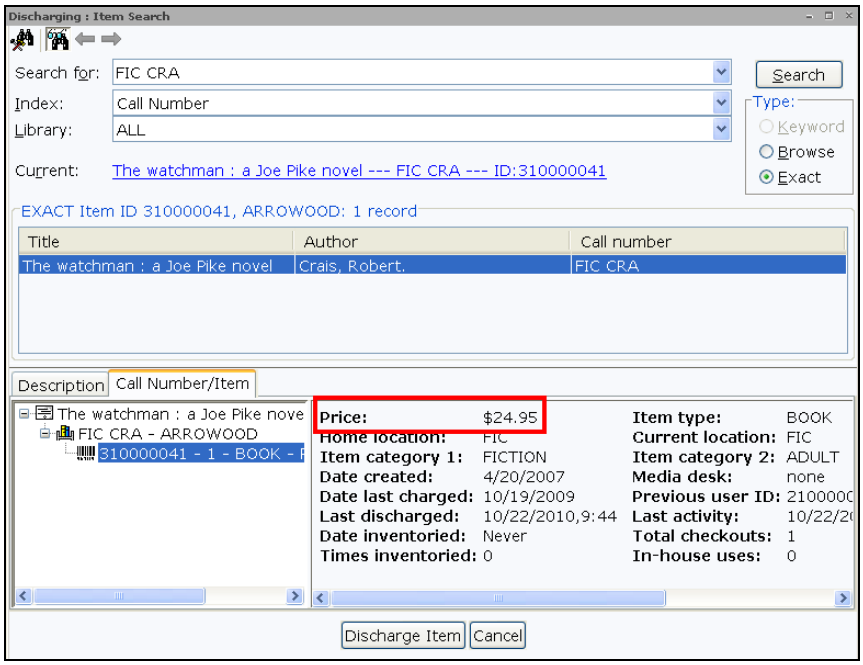
If staff identifies an item that has already been checked in but has been returned damaged, it is possible to charge the user a bill for damage. The system will provide the information of the previous user and the cost of the item.

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.





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.

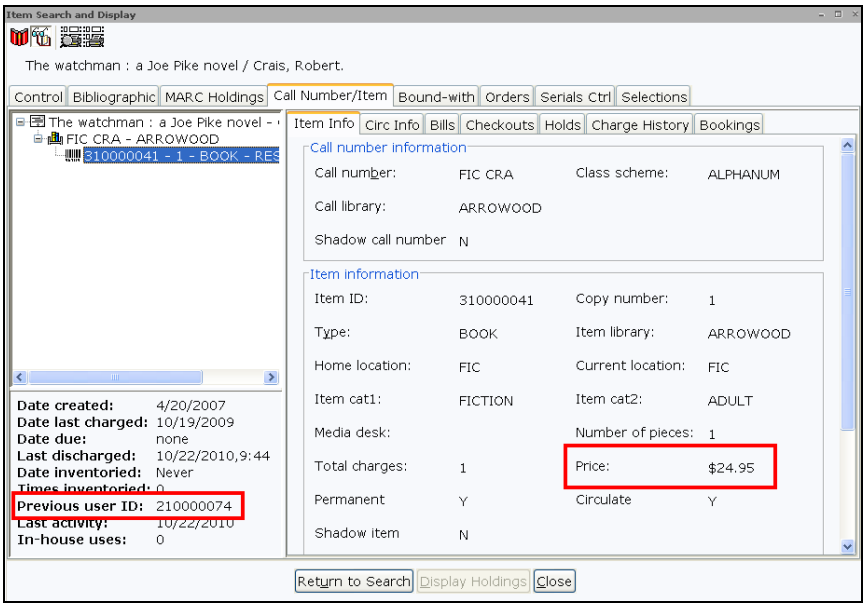
To locate the previous user ID and price of the item:

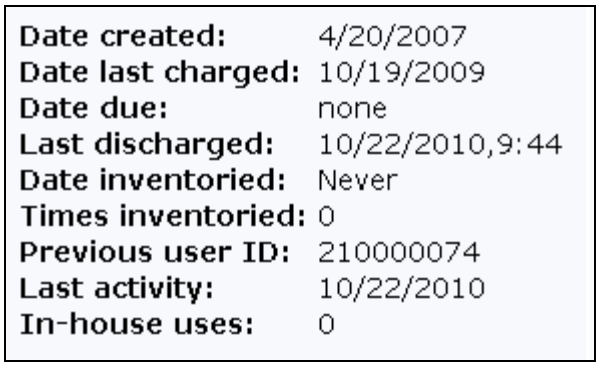
1. Within the Common Tasks group of wizards, click the ***Item Search and Display*** **wizard.**

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.

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





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

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

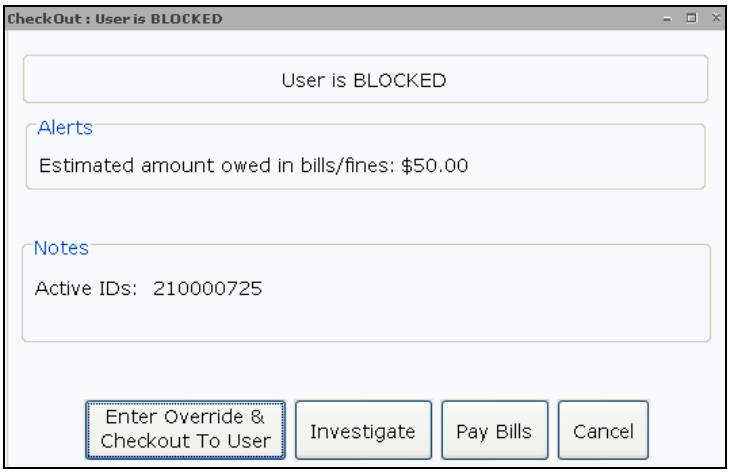
User Statuses

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

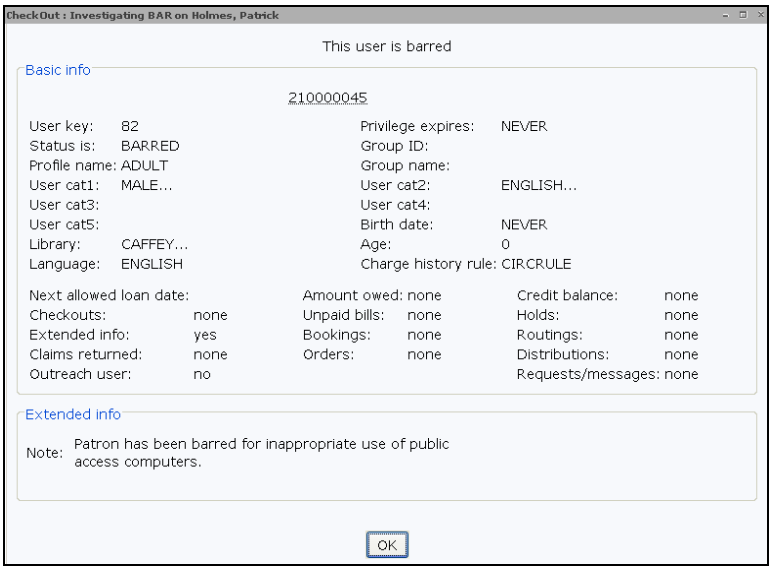
OK – User has full library privileges as defined in the policy file. The user is in good standing and has no overdue items or bills.

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.



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.

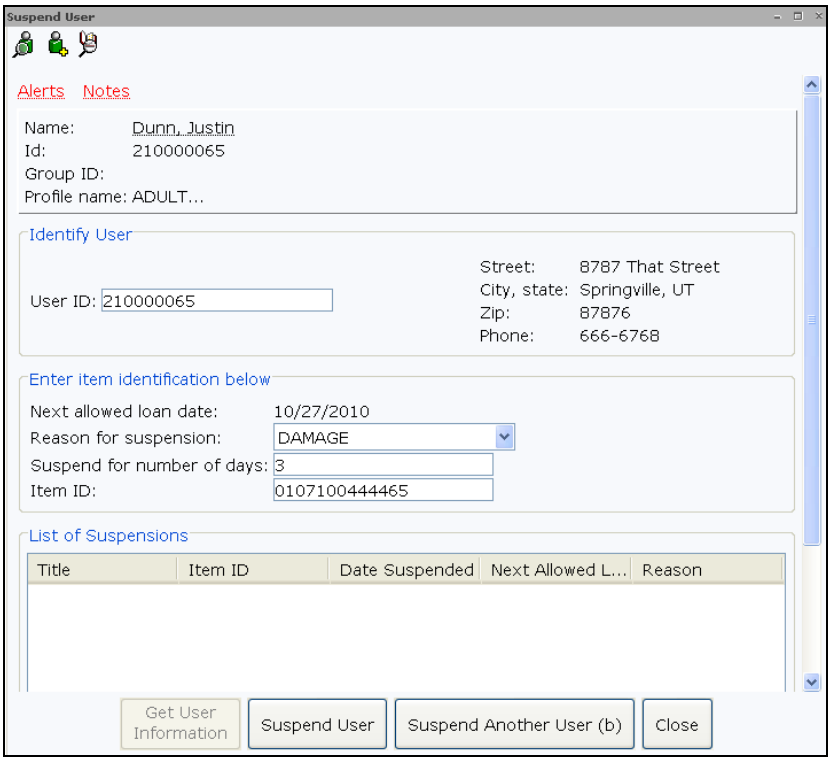
Once the suspension range has passed, the user will be able to resume circulation activity. Staff can also waive the suspension by a particular number of days or completely using the *Unsuspend User* wizard.

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.

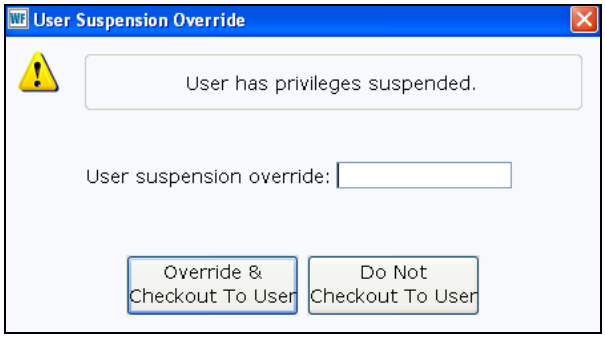


6. Click Suspend User.

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:



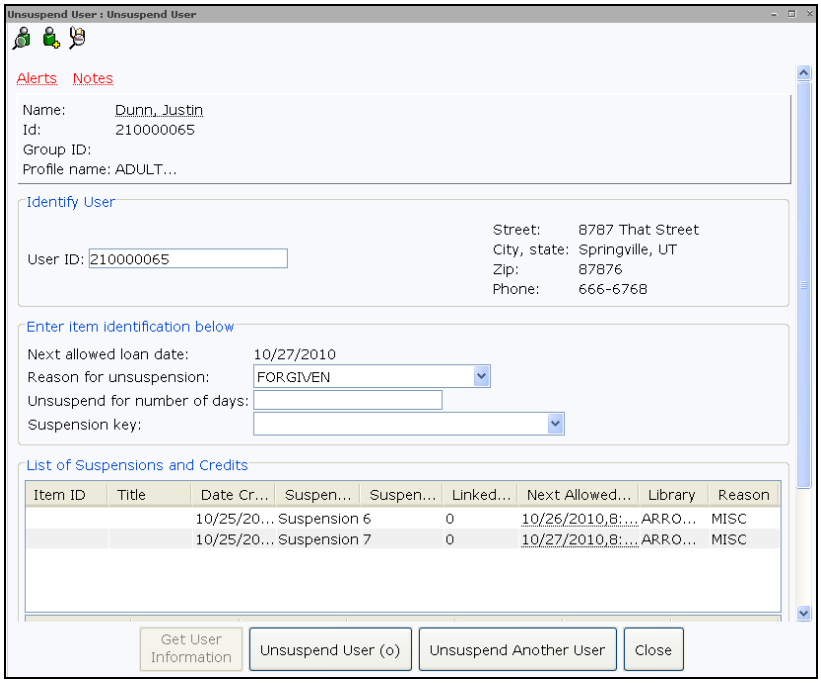
Unsuspend User Wizard

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:

1. Within the Users group of wizards, click the ***Unsuspend 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 unsuspension**.

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

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

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

6. Click **Unsuspend User**.

7. Click **Close**.

Working with Holds

In this section we will discuss how to place holds within WorkFlows and the online catalog. 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.

Placing Holds

Place Hold Wizard

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

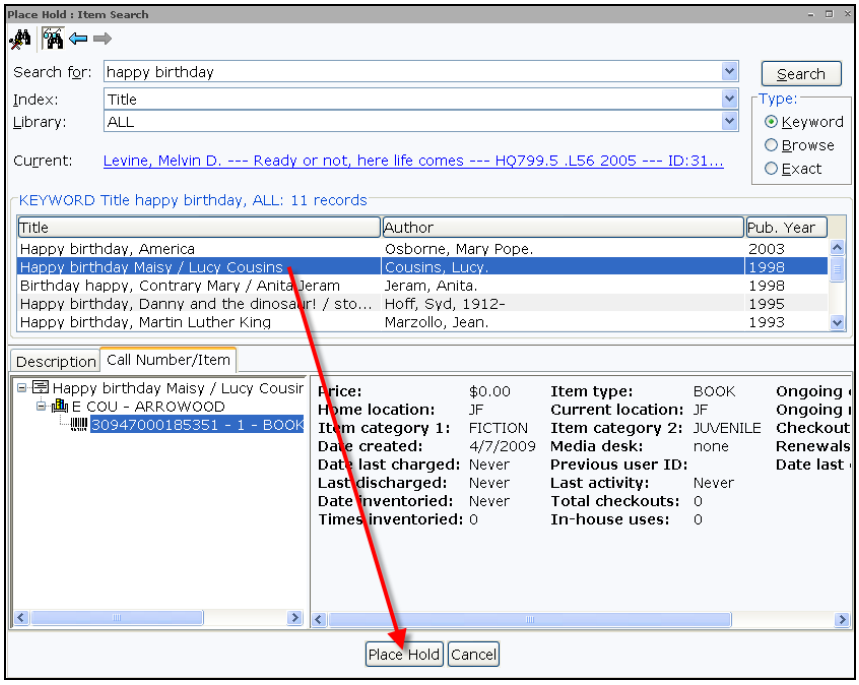
NOTE: If you try to place holds for a user with a BLOCKED status, you can determine the reason for the status and take actions to resolve the user's blocked status (if desired). You can then continue with the Place Hold process. For more information see the WorkFlows online Help file "FAQs: Placing Holds.

To place a hold in WorkFlows:

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



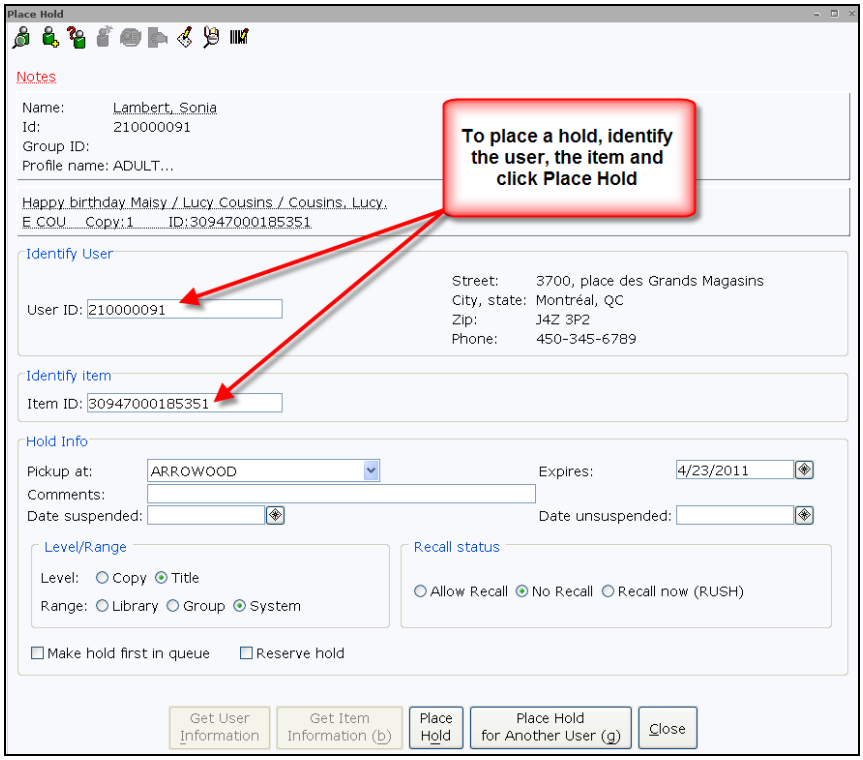
4. If necessary, change the pickup location with the Pickup At dropdown.

5. 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.

6. 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 Suspend* to select the effective date. Use the *Date Unsuspended* gadget to select the date the user wants to be "restored" in the hold queue. 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. Click **Place Hold**.

10. 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.

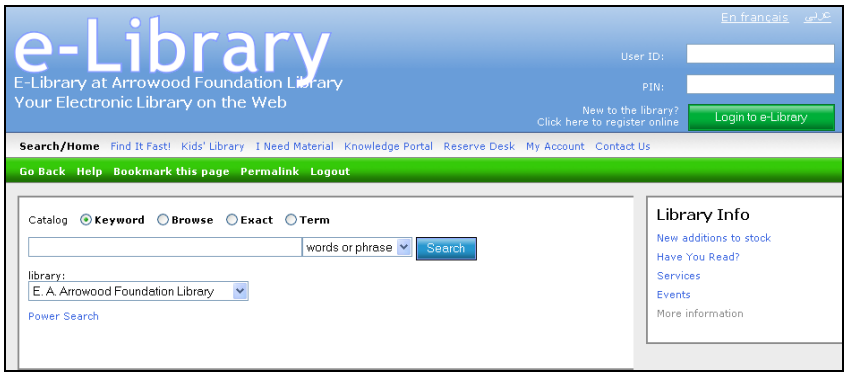
Library Range – The Library range applies a Title level hold on copies available in the item's library.

Placing a Hold in the Online Catalog

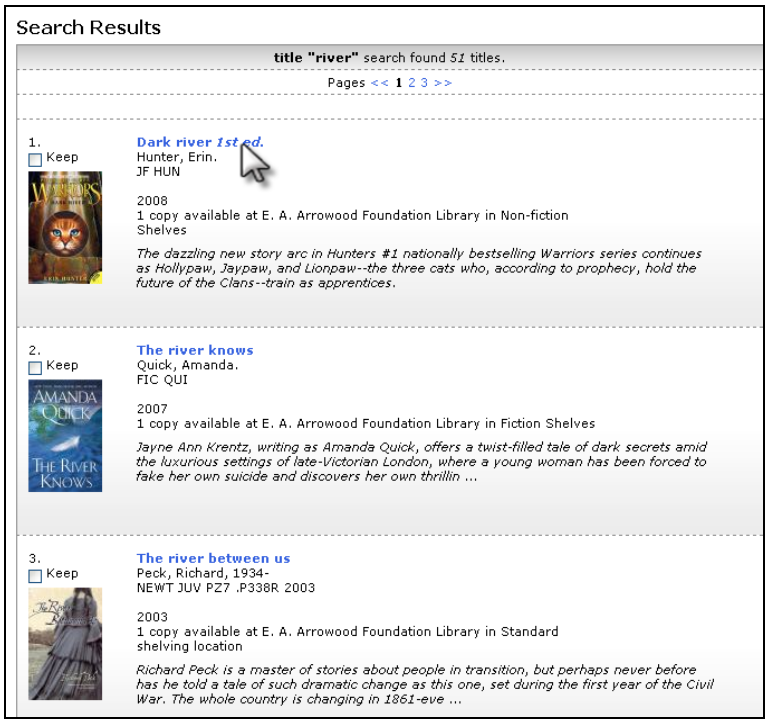
Users can place holds on items using any of the available SirsiDynix online catalogs.

To place a hold in e-Library:

1. Enter your search terms and, if necessary, change the type of search (title, author, etc.) and library. Click **Search**.

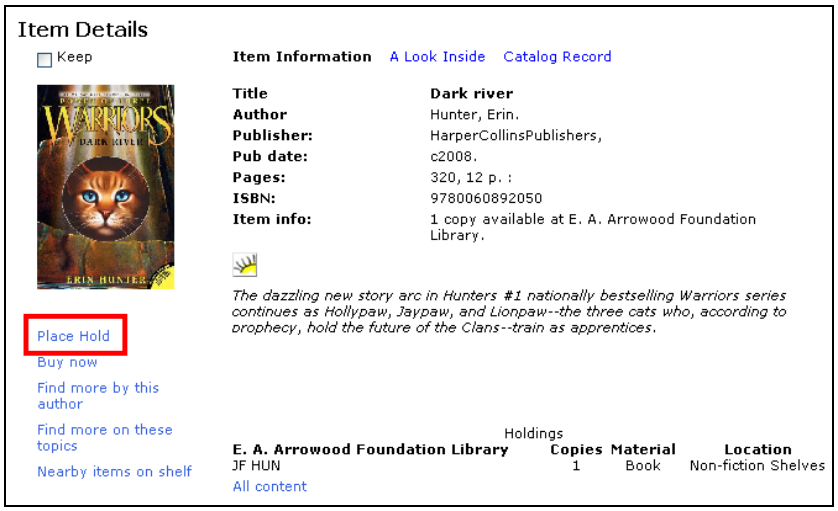


2. If you receive a hit list, click on the title you wish to place on hold.

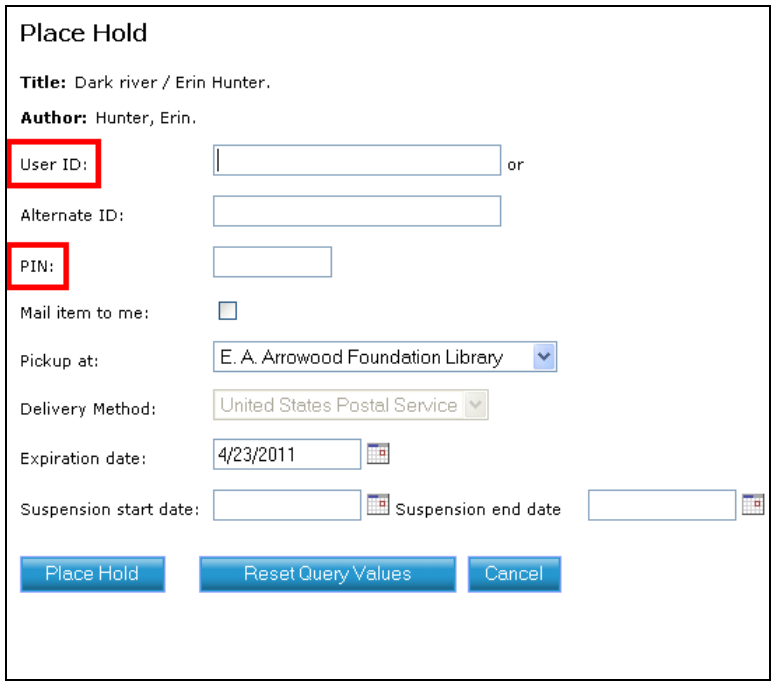


NOTE: Depending on configuration of the online catalog, the Place Hold option may appear in the hit list.

3. Within the Item Details, click **Place Hold**.



4. If you have not already logged in, enter your User ID and PIN.



5. If necessary, change the Pickup library or add a suspension start and end date.

6. Click **Place Hold**.

7. Click **OK** to the confirmation message.

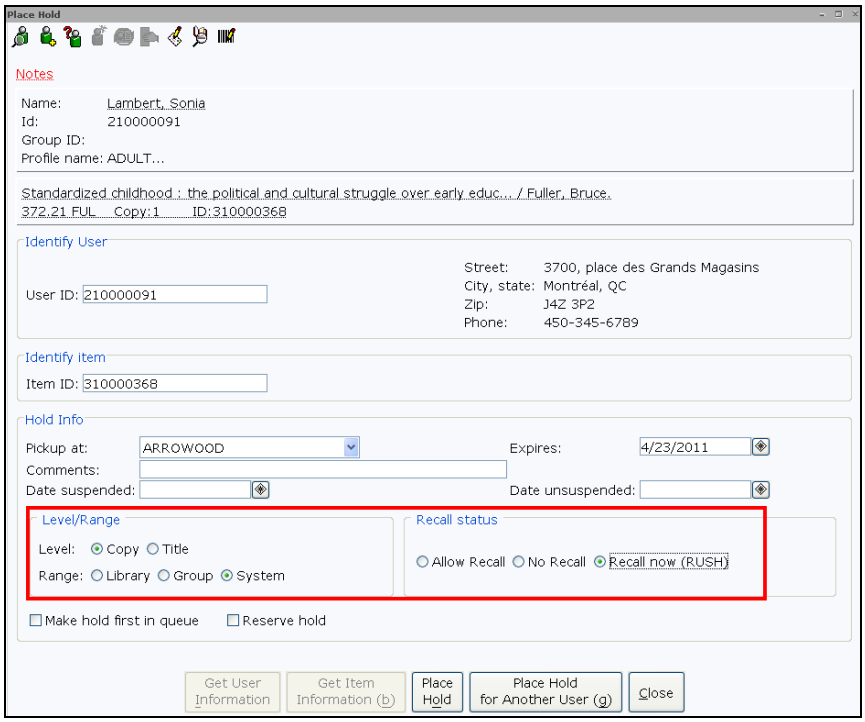
Placing a Recall Hold

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:

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

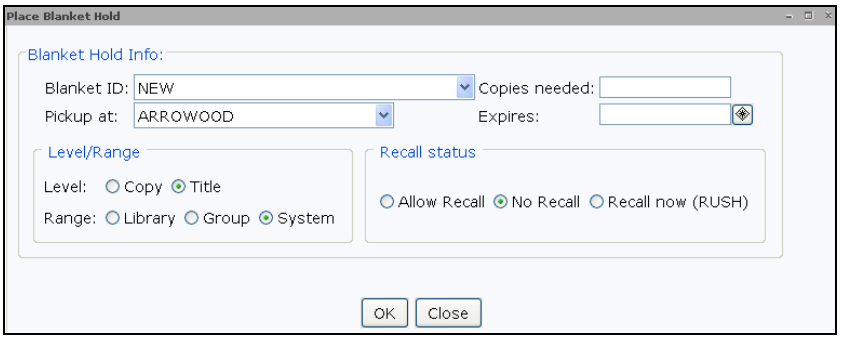
The *Place Blanket Hold* wizard can be used to place a single hold on multiple titles or items, It requires a specified number of items be available before the hold is considered filled.

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:

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

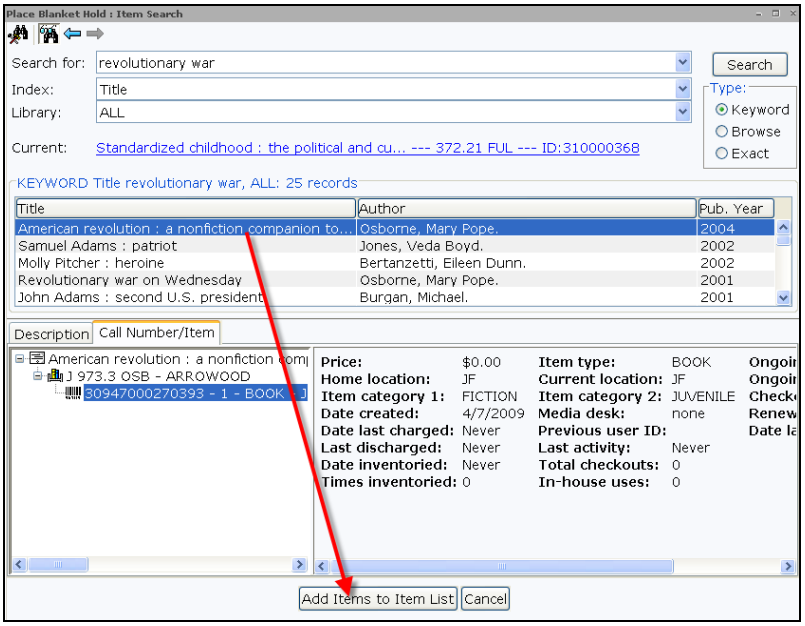
4. If necessary, change the pickup library using the Pickup At dropdown.

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

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

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

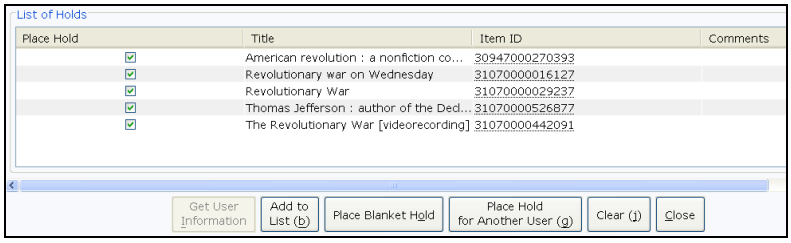
8. Highlight a title and click **Add Items to Item List**.



9. Click **Add to List**.

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.

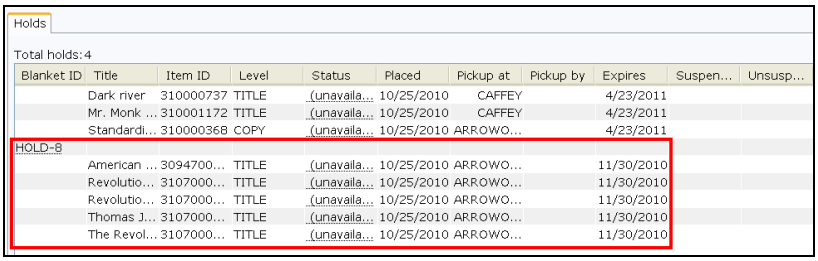


11. Click **Place Blanket Hold**.

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:



Displaying Hold Information

Staff can view hold records with different wizards within WorkFlows.

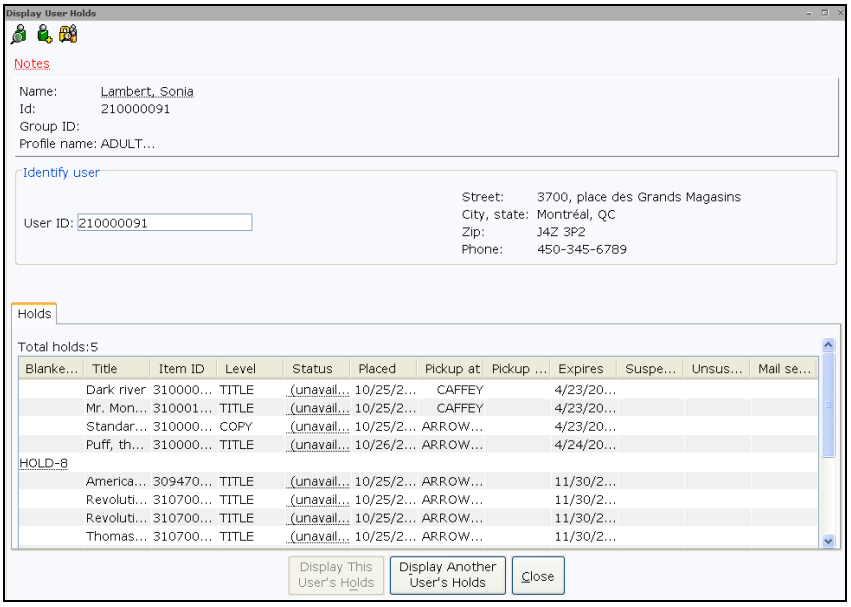
Display User Holds Wizard

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

To display holds for a user:

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

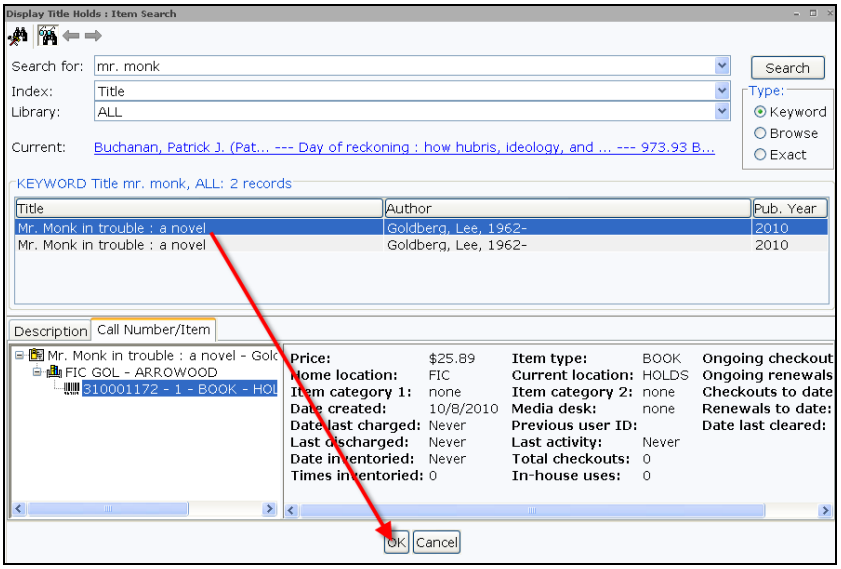
Display Title Holds Wizard

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:

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

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



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

4. Click **Close**.

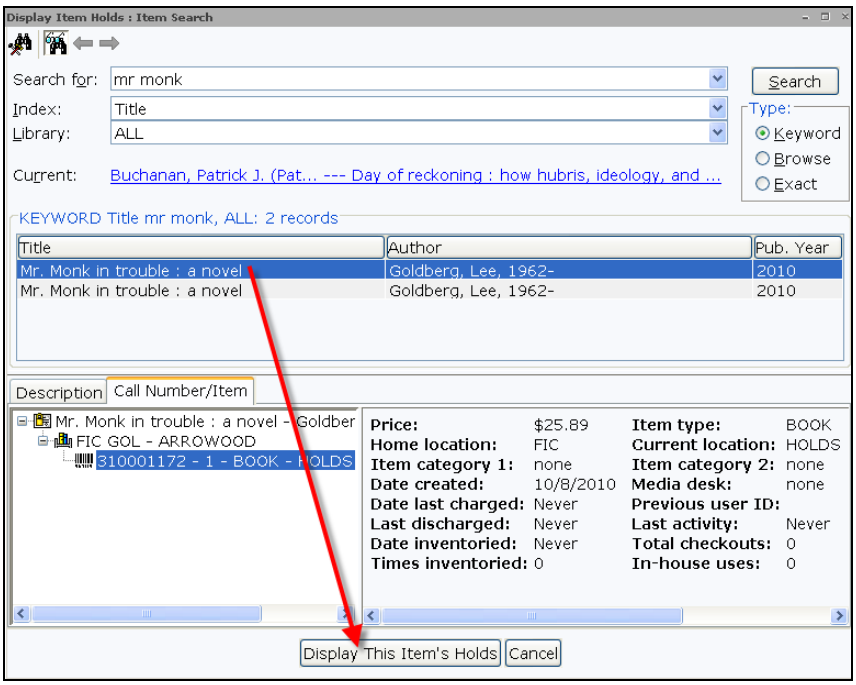
Display Item Holds Wizard

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

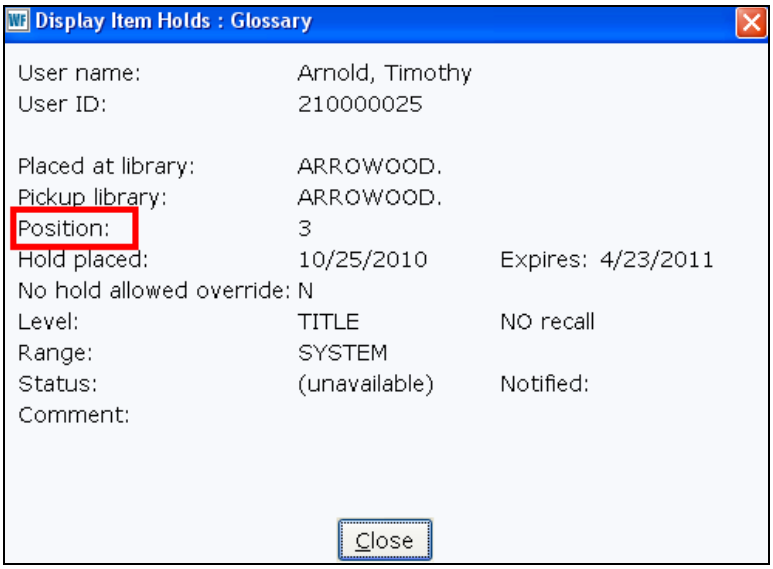
To display item holds:

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

2. 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**.



3. 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.



4. Click **Close.**

5. 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

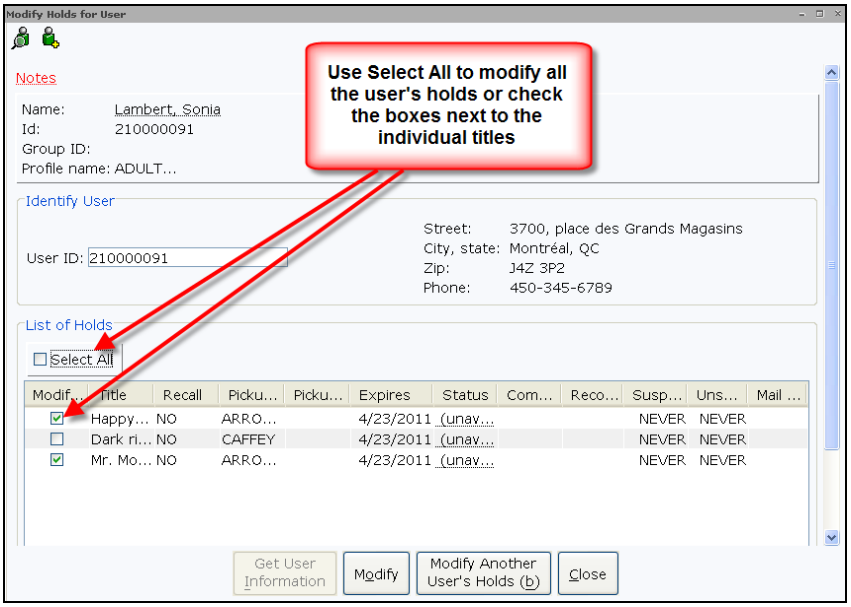
Modify Holds for User Wizard

To modify a user's hold:

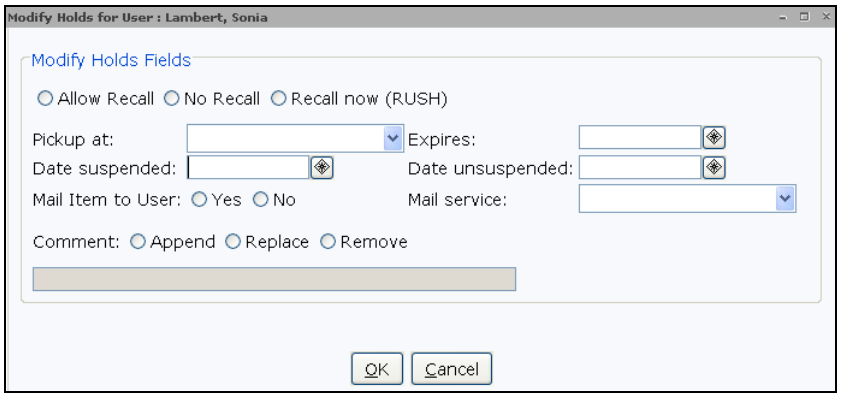
1. Within the Holds group of wizards, click the ***Modify Holds for User*** **wizard.**

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**.



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

6. Click **OK**.

7. Click **Close**.

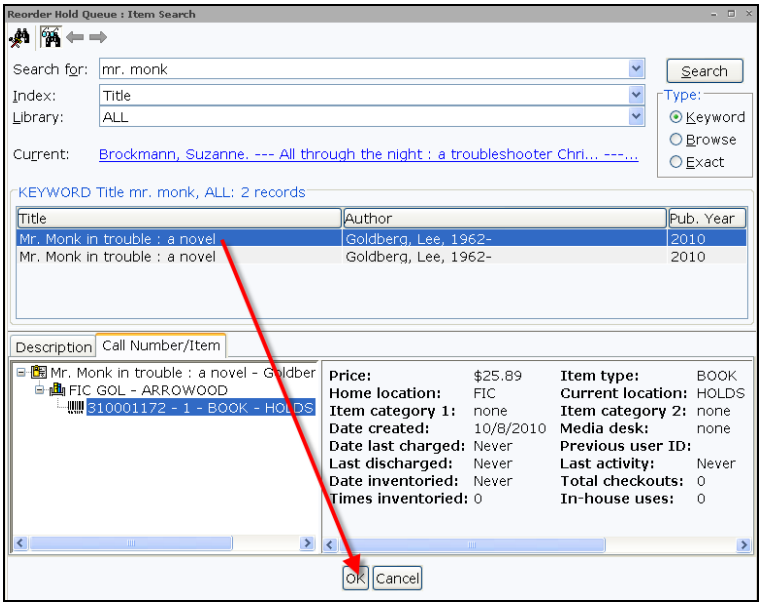
Reorder Hold Queue Wizard

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

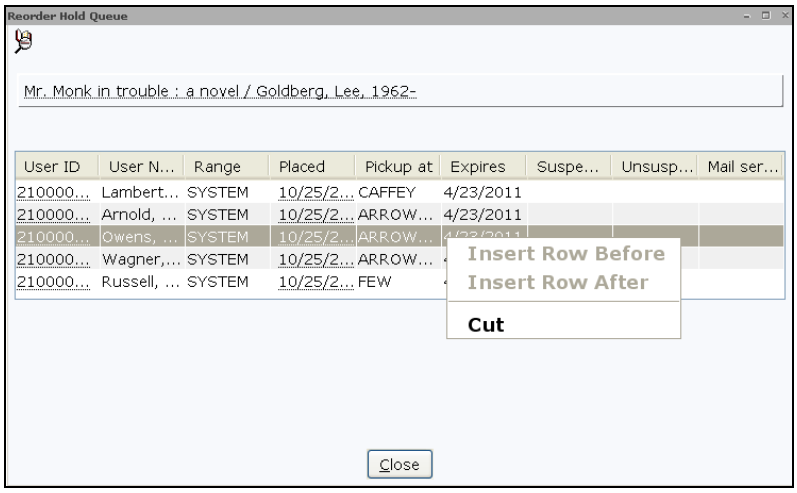
To reorder the hold queue:

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

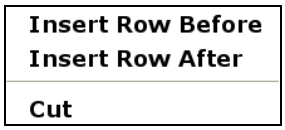
2. Search for the title you want to reorder the hold queue. If you receive a hit list, highlight the title you want to view and click **OK**.



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**.



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



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

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.

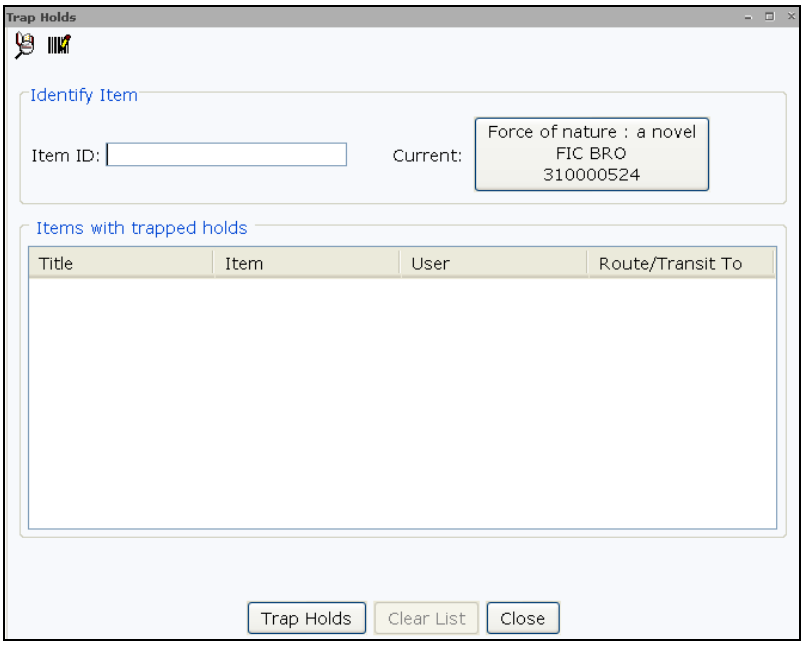
List Onshelf Items with Holds Report

This report produces a list of items qualified to satisfy a hold and are available for pickup somewhere in the library system.

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.

Onshelf Items Wizard

The *Onshelf Items* wizard is used to display items on the shelf in your library wanted for holds. Rather than viewing the output of the List Onshelf Items with Holds report from the finished report list or emailing the output to individual users, you can view the output from a single wizard on the Circulation toolbar.

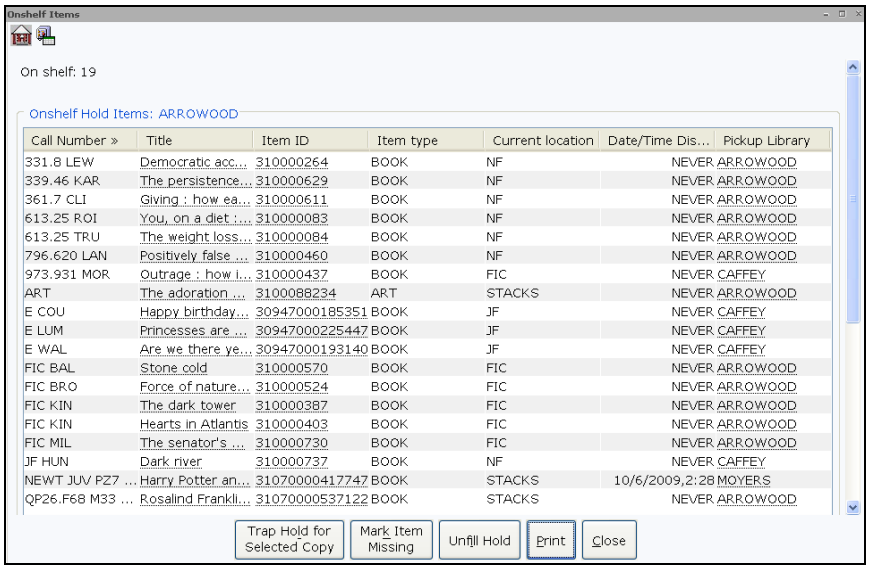
By default, the wizard will display a list of holds wanted from the station login library.

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.**



Call Number »	Title	Item ID	Item type	Current location	Date/Time Dis...	Pickup Library
331.8 LEW	Democratic acc...	310000264	BOOK	NF	NEVER	ARROWOOD
339.46 KAR	The persistence...	310000629	BOOK	NF	NEVER	ARROWOOD
361.7 CLI	Giving : how ea...	310000611	BOOK	NF	NEVER	ARROWOOD
613.25 ROI	You, on a diet :...	310000083	BOOK	NF	NEVER	ARROWOOD
613.25 TRU	The weight loss...	310000084	BOOK	NF	NEVER	ARROWOOD
796.620 LAN	Positively false ...	310000460	BOOK	NF	NEVER	ARROWOOD
973.931 MOR	Outrage : how i...	310000437	BOOK	FIC	NEVER	CAFFEY
ART	The adoration ...	3100088234	ART	STACKS	NEVER	ARROWOOD
E COU	Happy birthday...	30947000185351	BOOK	JF	NEVER	CAFFEY
E LUM	Princesses are ...	30947000225447	BOOK	JF	NEVER	CAFFEY
E WAL	Are we there ye...	30947000193140	BOOK	JF	NEVER	CAFFEY
FIC BAL	Stone cold	310000570	BOOK	FIC	NEVER	ARROWOOD
FIC BRO	Force of nature...	310000524	BOOK	FIC	NEVER	ARROWOOD
FIC KIN	The dark tower	310000387	BOOK	FIC	NEVER	ARROWOOD
FIC KIN	Hearts in Atlantis	310000403	BOOK	FIC	NEVER	ARROWOOD
FIC MIL	The senator's ...	310000730	BOOK	FIC	NEVER	ARROWOOD
JF HUN	Dark river	310000737	BOOK	NF	NEVER	CAFFEY
NEWT JUV PZ7 ...	Harry Potter an...	31070000417747	BOOK	STACKS	10/6/2009,2:28	MOYERS
QP26.F68 M33 ...	Rosalind Frankli...	31070000537122	BOOK	STACKS	NEVER	ARROWOOD

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

3. Once the materials have been collected from the shelf, to trap a hold, highlight the title and click **Trap Hold for Selected Copy**.

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

4. 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.

5. If you cannot locate an item on the list, you could mark it missing; highlight the title and click **Mark Item Missing**.

6. Click **OK**.

7. If you do not want an item to fill a hold, highlight the item and click **Unfill Hold** .

8. Click **OK**.

9. Once you have finished working with the list, click **Close**.

NOTE: 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."

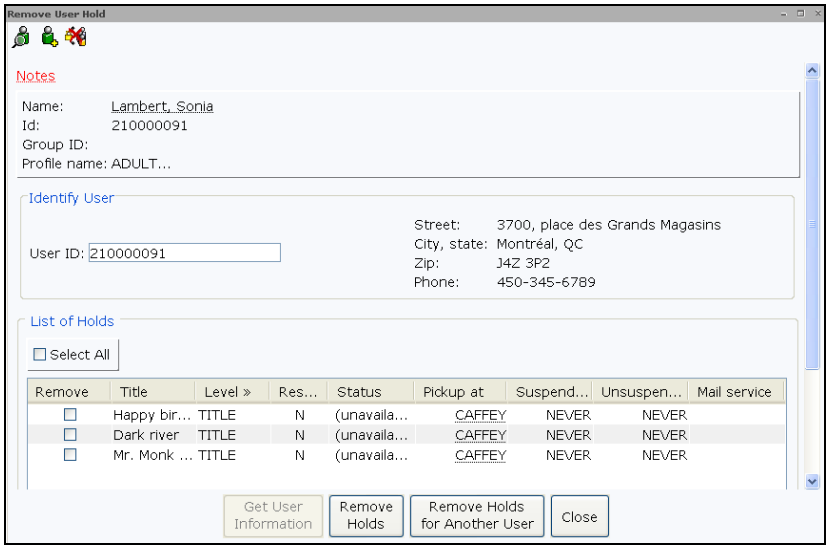
Removing a Hold

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:

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



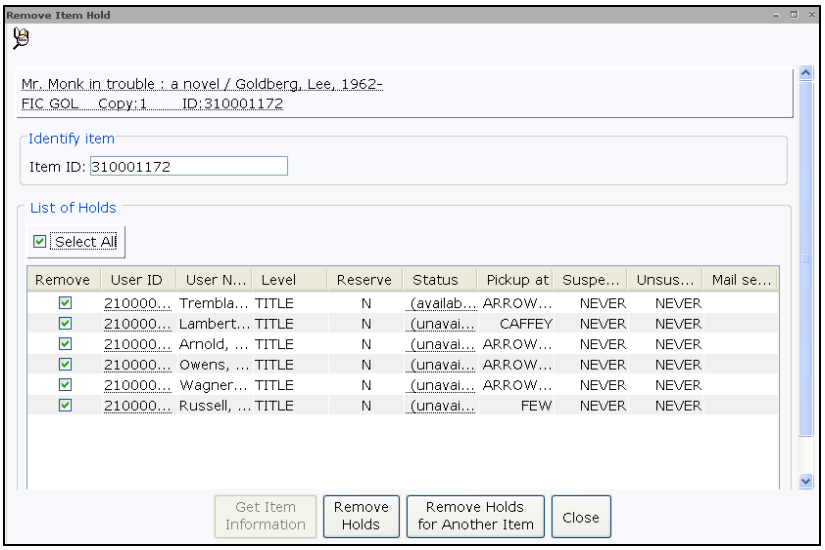
3. To remove all of the user's holds, click the Select All check box. To remove selected holds, select the Remove check box next to each hold you want to modify.

4. Click **Remove Holds**.

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

6. 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

In this chapter, we introduce you to tasks related to items. This includes adding brief titles and items, editing item records and marking items lost, missing or claimed returned.

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

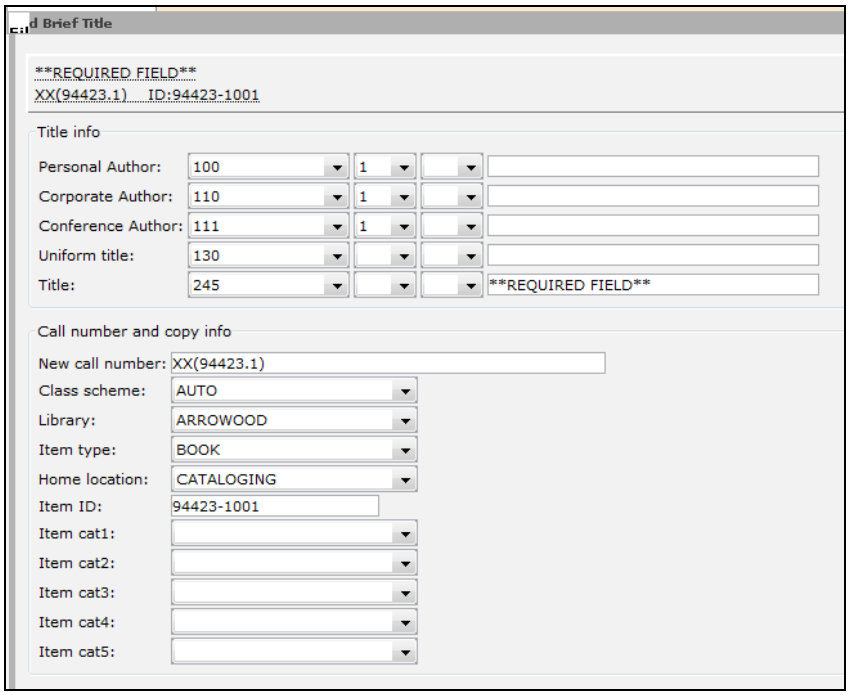
The *Add Brief Title* wizard creates a brief record when you need to circulate an item that has not been fully cataloged. When checked in, WorkFlows retains the record. It can be routed to be fully cataloged or it can be removed. You can also use this wizard to enter interlibrary loan items into the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



5. Click **Add Brief Title**.

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

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

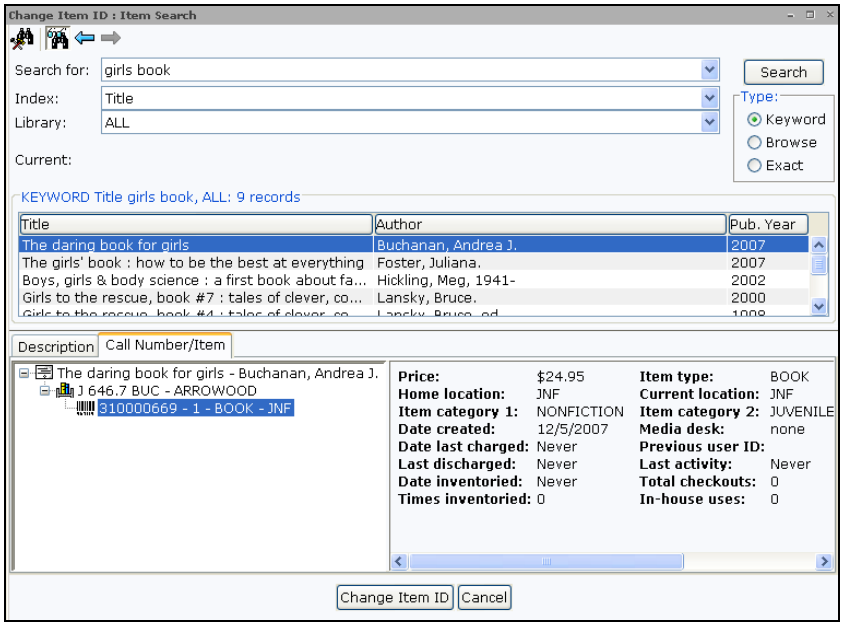
Changing an Item ID

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.

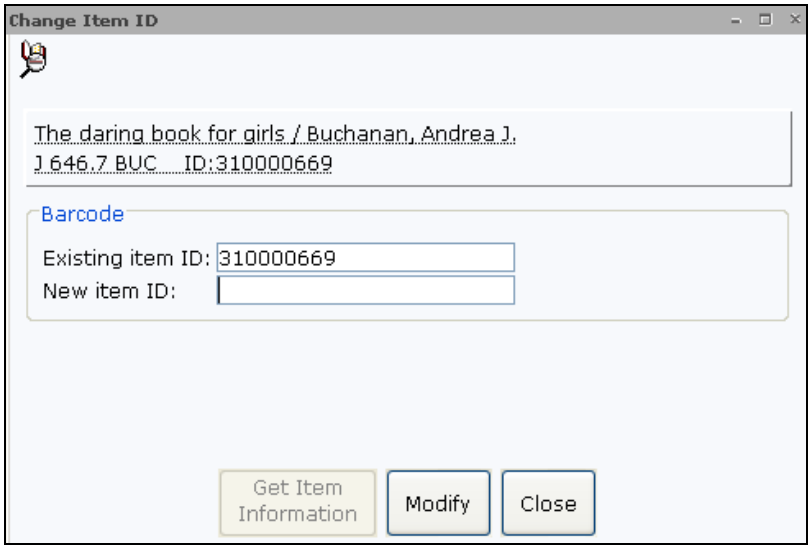
To change an item ID:

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

2. 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**.



3. In the New Item ID field, scan or type the new item's barcode and click **Modify**.



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

4. 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

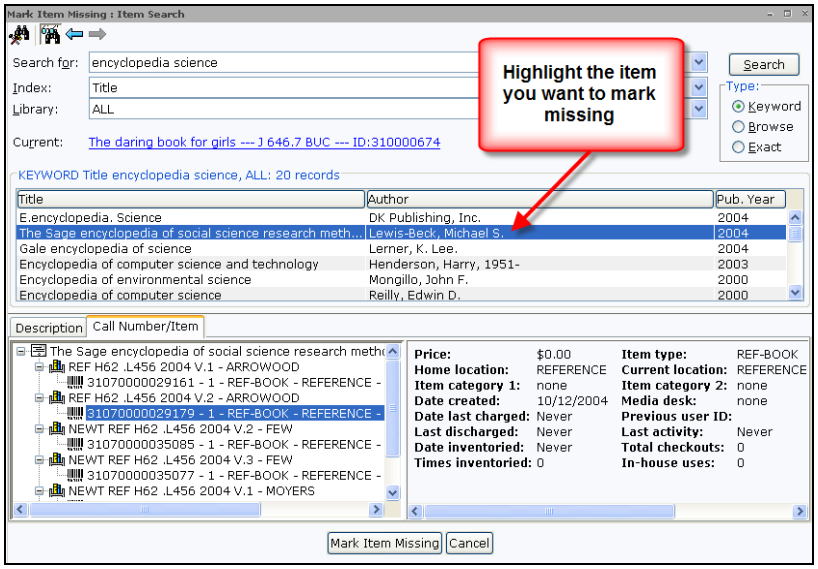
The *Mark Item Missing* wizard is used to check out an item in the catalog to the MISSING user when staff cannot locate it. By checking out the item to this user, it changes the Current Location to MISSING. This alerts staff and shadows (hides) the item from the public, so they do not spend time or effort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

To mark an item missing:

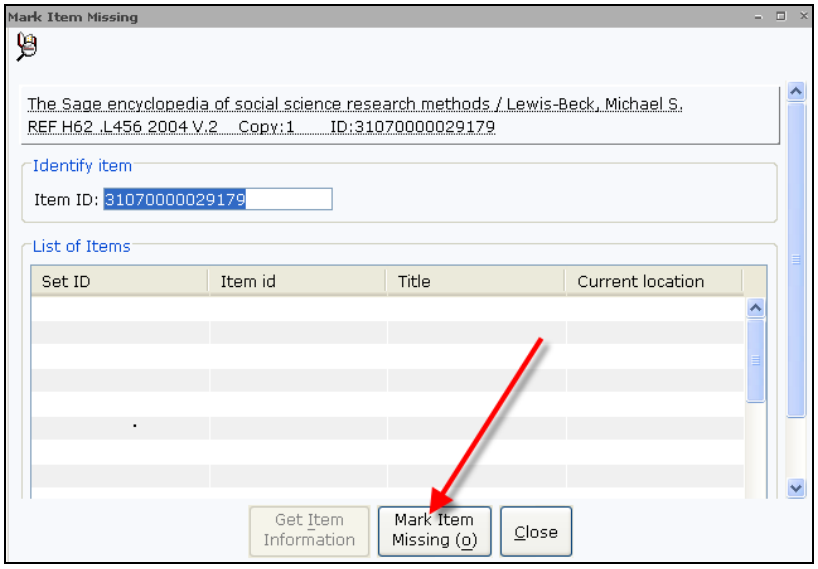
1. Within the Items group of wizards, click the ***Mark Item Missing* wizard.**

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

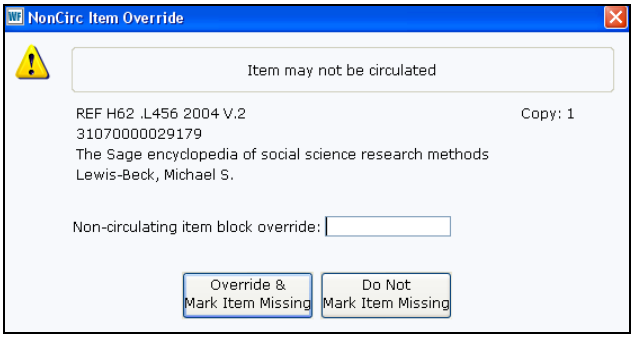
3. If there are multiple item records, select the item you want to change and click **Mark Item Missing**.



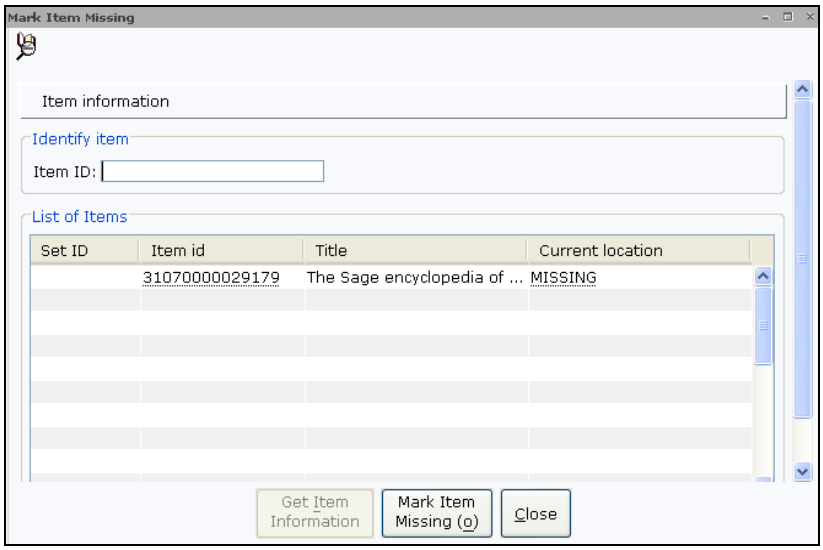
4. Click **Mark Item Missing**.



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.



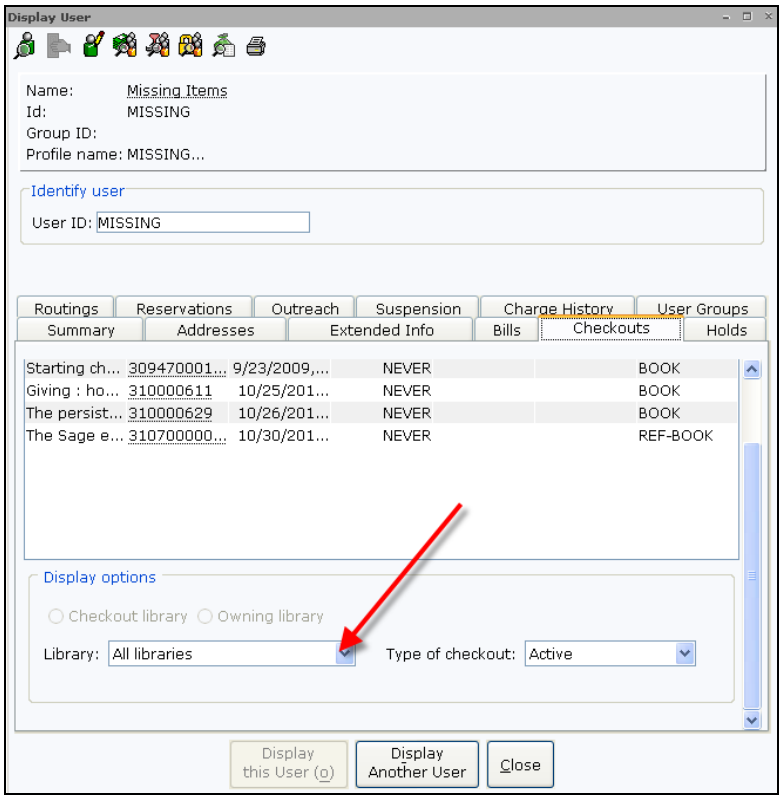
7. Click **Close**.

To see a list of missing items:

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

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

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



4. To see the items missing at your library, select the library from the dropdown list and verify that the button next to Owning Library is selected.

5. 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.

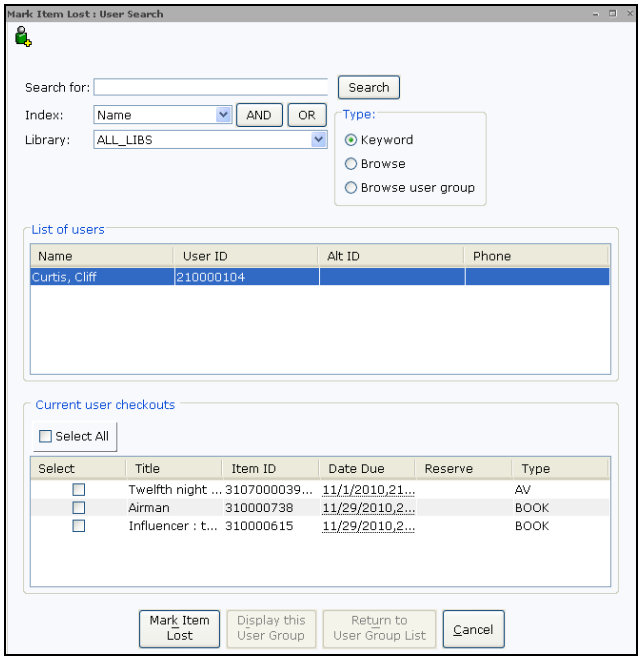
- Keeps the item on the user's record until the lost item bill is paid, forgiven or waived or if it is returned to the library.
- Maintains the Current Location of LOST-CLAIM until the item returns to circulation.

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.

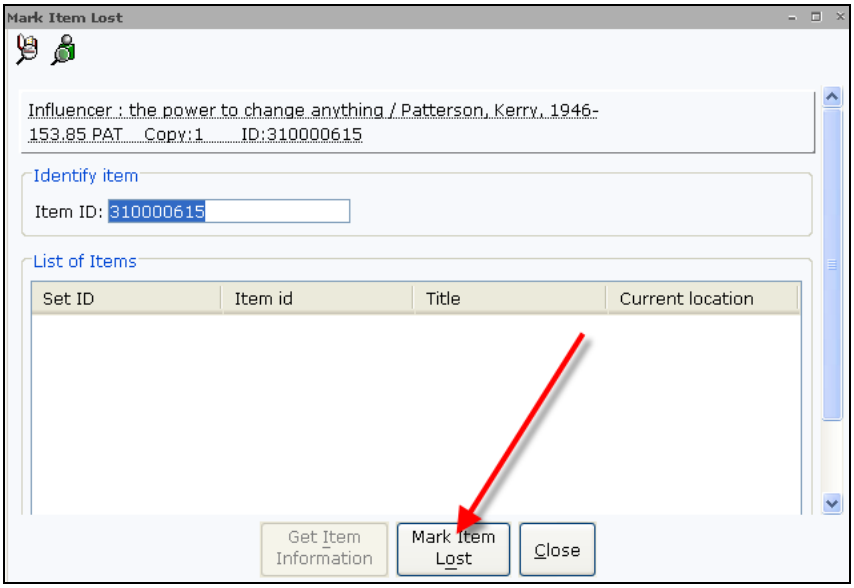
For more information, refer to the WorkFlows online Help topic "FAQs: Marking Items as Lost."

To mark an item lost:

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

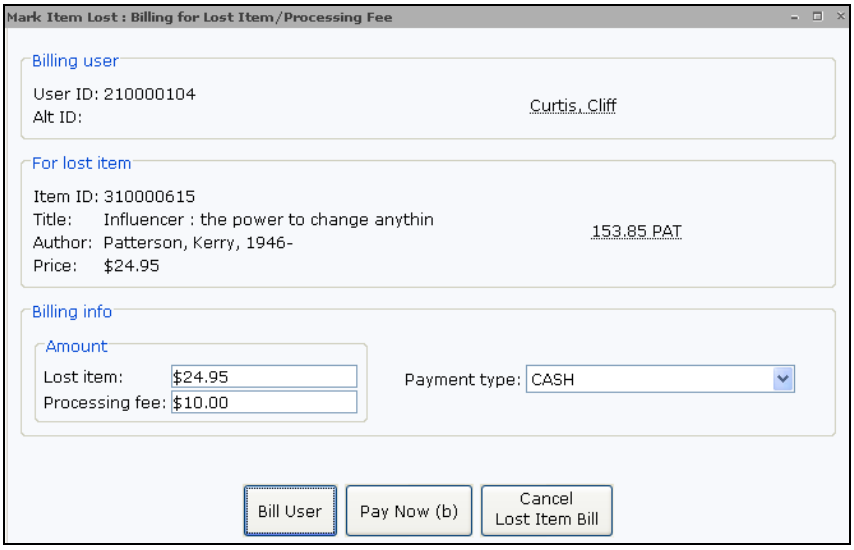


4. Click **Mark Item Lost**.
5. Click **Mark Item Lost** again.



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

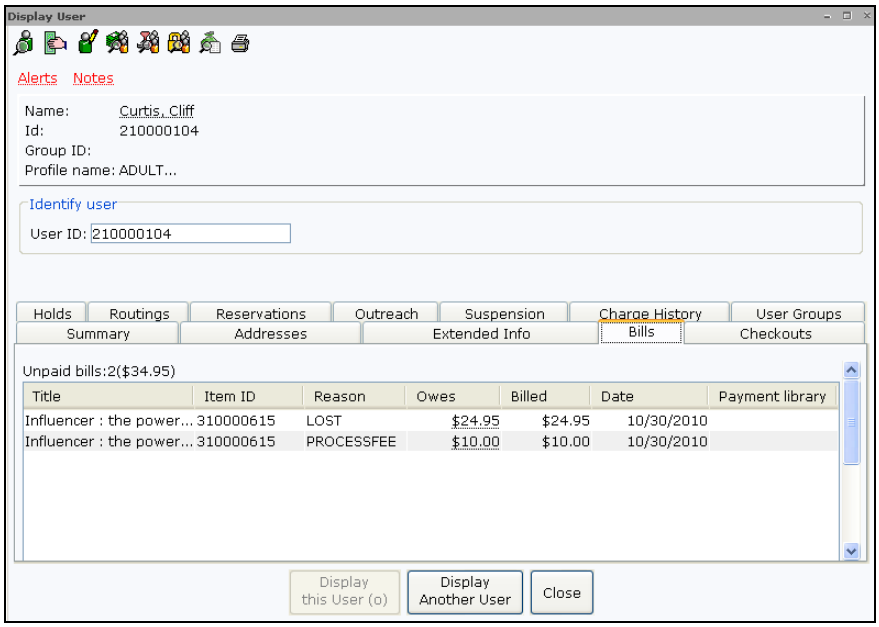
7. Enter or change the Processing Fee, if necessary.



8. 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**.

9. Click **OK** to the confirmation message.

10. 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.

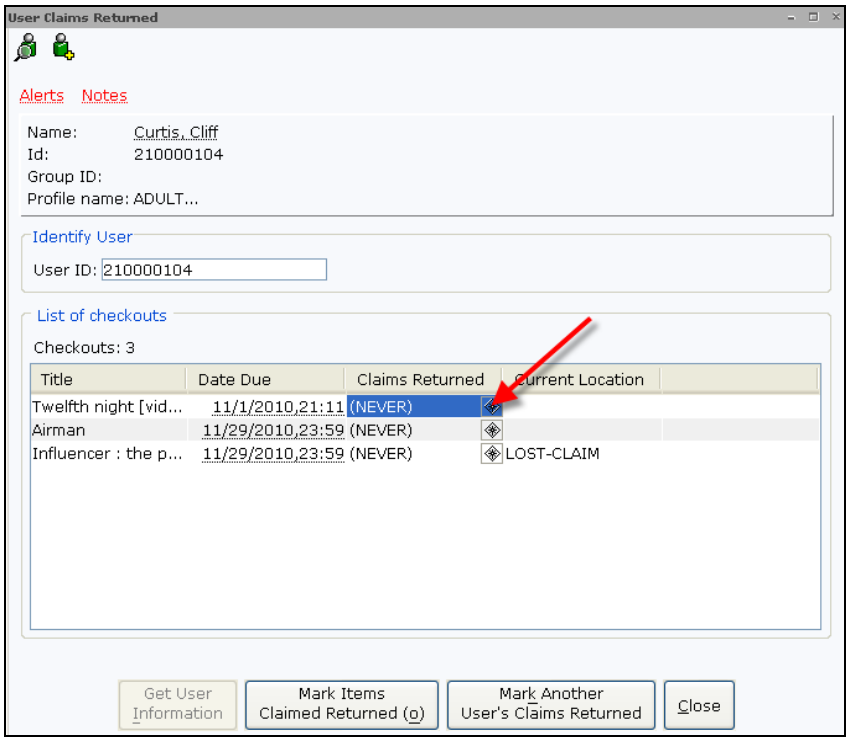
A Claims Returned status is usually considered a temporary status. The item remains charged to the patron for a time until the library determines if it is necessary to declare the item lost.

To mark an item claims returned:

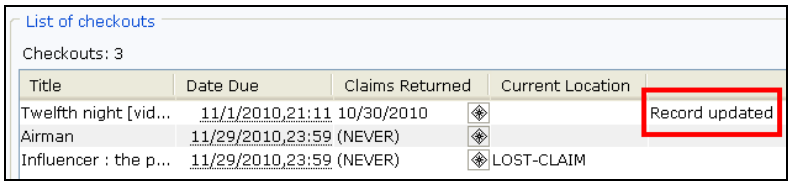
1. Open the Special group of wizards and click the ***User Claims Returned*** **wizard.**

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.

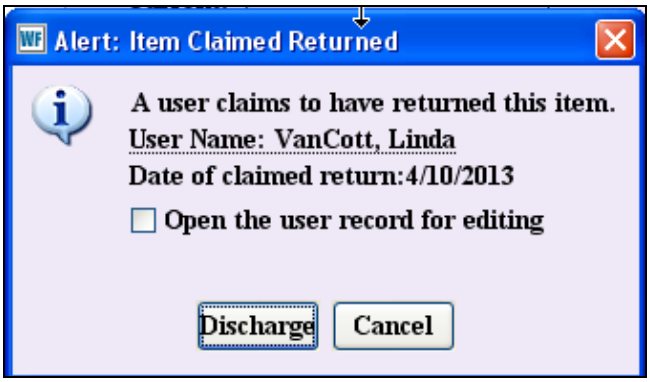
3. Click the ***Calendar*** **gadget** next to each item the user claims was returned and select a date. This updates the information in the Claims Returned column.



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



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:

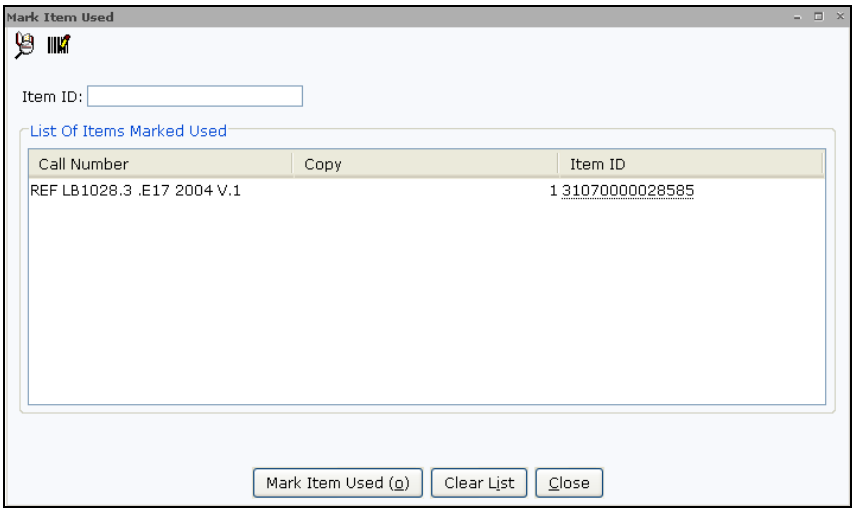
- Mark items used for statistical purposes.
- Check out impermanent materials such as forms, paperback novels, etc.
- View and receive items in transit.

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.

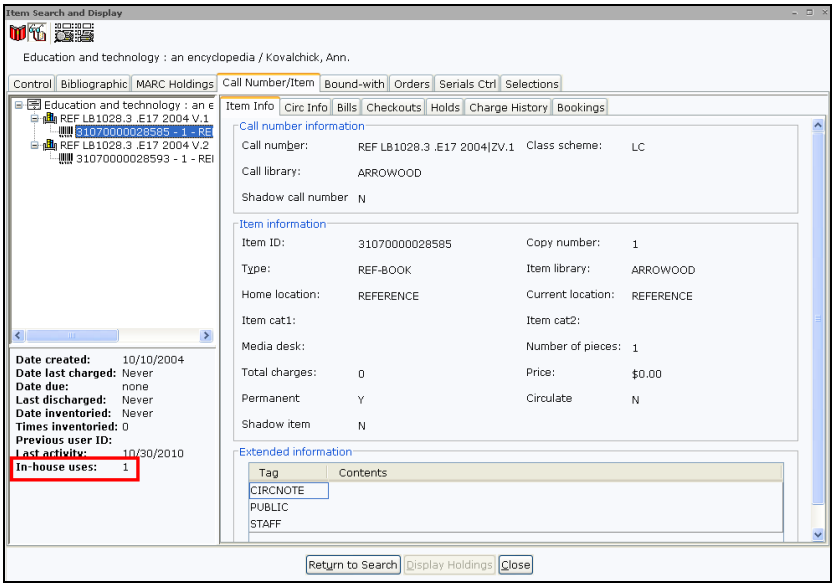
To mark an item used:

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. Continue to scan items until finished.
4. Click **Close**.

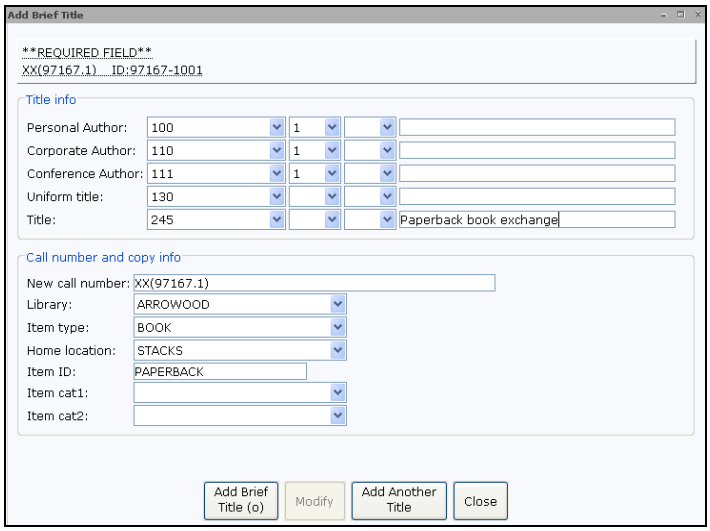
In the *Item Search and Display* wizard, you will now see Last activity and In-house uses values. These values can be used as selection criteria within reports.



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.

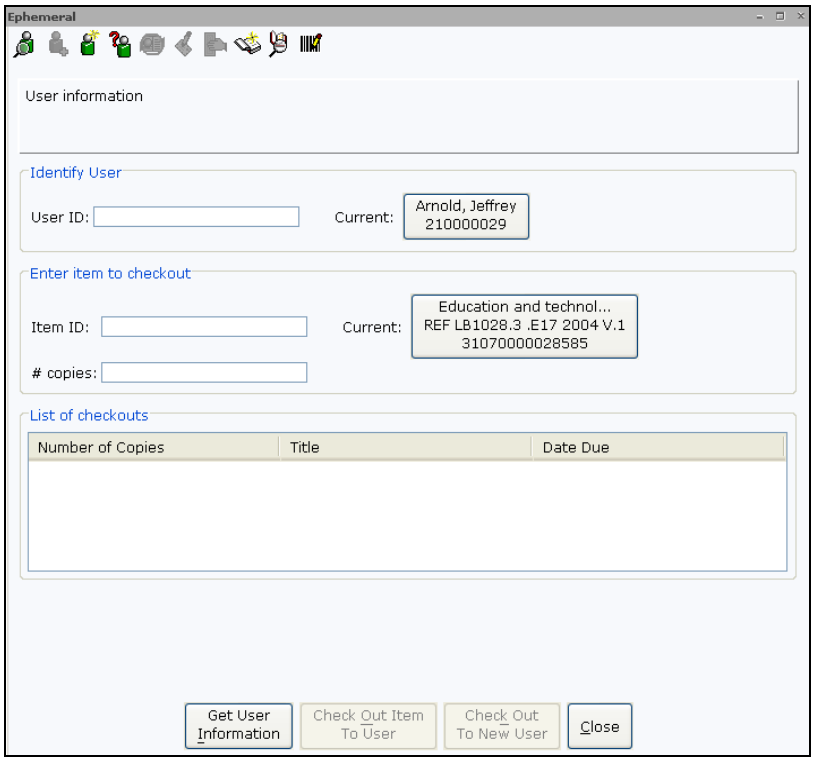


The wizard checks out an item out and then immediately discharges it. The *Ephemeral* wizard repeats the charge and discharge sequence for every item presented for check out.

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

To check out impermanent items:

1. Within the Special group of wizards, click the ***Ephemeral* 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. Type the number of copies.

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

5. Click **Close**.

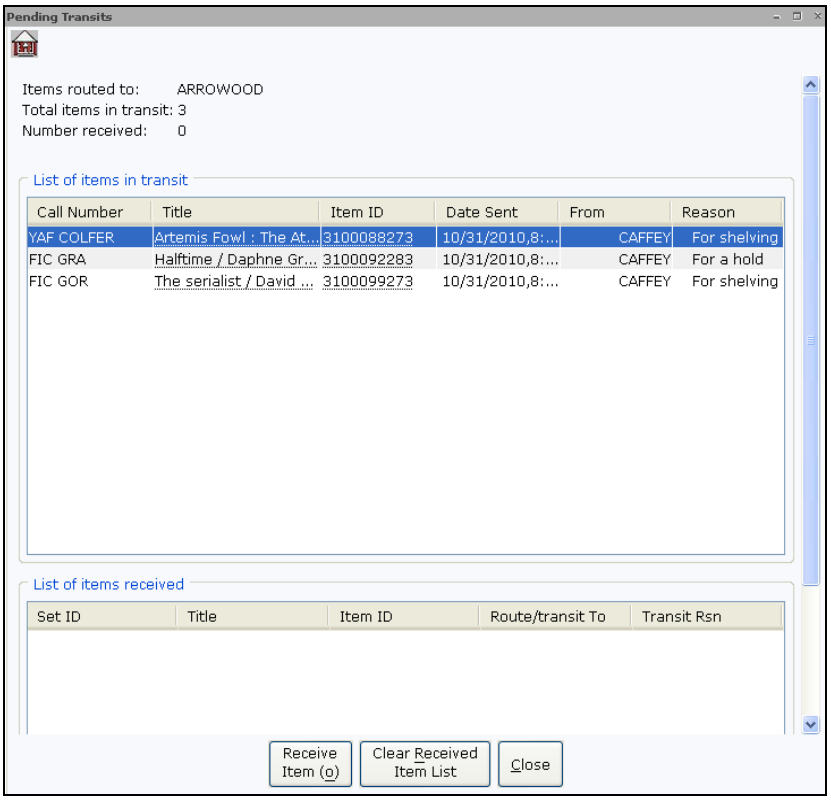
Viewing and Placing Items in Transit

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:

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



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

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

4. Click **Close**.

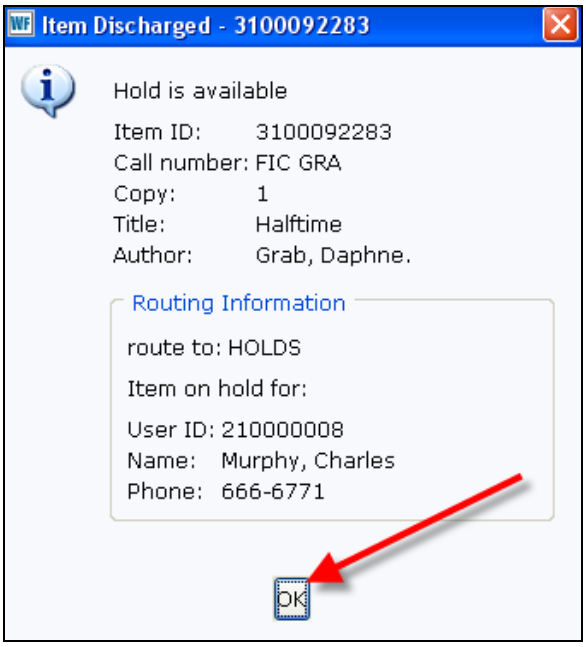
Library staff can receive in transit items using the *Receive Transit* wizard to take items out of transit. You can perform this same function using the *Check In* wizard.

To receive an in transit item:

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

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

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



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.