Symphony Circulation
Training Guide
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Introduction

Training Overview

Intended Audience

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

Prerequisite

It is recommended that you are familiar with the essential skills of Symphony. There is a free self-paced course, as well as a training guide reviewing these skills.

Goals

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

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

Getting Connected

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

This guide reviews the wizards available within Symphony Circulation. It is broken down by type of wizard. There are also task based exercises at the end of this guide to assist you in mastering common tasks within Circulation.

Terminology/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 Check-in 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:

![Image of the system displaying search results]

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:
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.

<table>
<thead>
<tr>
<th>Basic Info</th>
<th>Privilege</th>
<th>Demographics</th>
<th>Addresses</th>
<th>Extended Info</th>
<th>Outreach</th>
<th>User groups</th>
</tr>
</thead>
<tbody>
<tr>
<td>User cat1:</td>
<td>FEMALE</td>
<td>User cat2:</td>
<td>ENGLISH</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>User cat3:</td>
<td>MIDDLE</td>
<td>User cat3:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department:</td>
<td></td>
<td>Birth date:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Language:</td>
<td>ENGLISH</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

8. Click the Addresses tab.

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

<table>
<thead>
<tr>
<th>Basic Info</th>
<th>Privilege</th>
<th>Demographics</th>
<th>Addresses</th>
<th>Extended Info</th>
<th>Outreach</th>
<th>User groups</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address 1</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>PHONE</td>
<td>314-887-2937</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DAYPHONE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HOMEPHONE</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LINE</td>
<td>C/O Dan Stevens</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>STREET</td>
<td>12344 Olive Boulevard</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CITY/STATE</td>
<td>Creve Coeur, MO</td>
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</tr>
<tr>
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<td>63141</td>
<td></td>
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</tr>
<tr>
<td>EMAIL</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>LOCATION</td>
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</tbody>
</table>

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:

![Checkout wizard error message](image)

**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.

![Renew Privilege wizard](image)

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:

![Image of a message indicating privilege expiration]

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

![Image of a user record with address information highlighted]

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:

![Remove User Error]

User has charges—cannot remove

![Remove User Error]

Cannot Remove. User has holds

Remove User Hold

Cancel

![Remove User Error]

Cannot Remove. User has bills

Pay bills

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

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

### Modifying Existing Due Dates

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

**To modify due dates:**

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.
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.**
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.

![Bill Example]

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**.
Click Pay Bills.

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.

---

**Results of Hold Request(s)**

<table>
<thead>
<tr>
<th>Hold(s) Placed</th>
<th>Item Search</th>
<th>Pickup loc: Patrick Caffey Public Library</th>
<th>Expiration date: Apr 23, 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dark river</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hunter, Emn.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>JF HUN</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

**Symphony Circulation Training Guide, Page 56**
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 12:36:30 2010
Library: ARROWOOD

973.981 MOR
Morris, Dick
Outrage : how illegal immigration, the United Nations, Congressional 
 copy:1  item ID:31000000497  type:BOOK  location:PIC
user ID:2100000089  user name:Rusell, Amy
Pickup library:CAFFEY  Date of discharge:NEVER

FIC BAL
Baldacci, David
Stone cold / David Baldacci 
 copy:1  item ID:31000000497  type:BOOK  location:PIC
user ID:2100000089  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:31000000584  type:BOOK  location:PIC
user ID:2100000090  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:3100000083  type:BOOK  location:PIC
user ID:2100000073  user name:Kaiser, 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.
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.”
Managing the Holds Shelf

Trap Holds Wizard

While holds can be trapped from the Onshelf Holds wizard, they can also be scanned directly into the Trap Holds wizard. This is the suggested way to trap holds, as staff have to physically scan an item’s barcode to trap the hold.

Manage Hold Shelf Wizard

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

To modify holds that are on the hold shelf:

1. Within the Holds group of wizards, open the Manage Hold Shelf wizard.

2. The list of current holds will display. Select the hold you wish to modify; and click Modify.

3. From this window, you will have the option to mark the item missing, modify the settings of the hold, or remove the hold.

   a. Marking an item as missing here opens the same options discussed in the Mark Items Missing section of this guide.

   b. The Remove Hold option will open the same options discussed in the Removing a Hold section of this guide.
4. Click **Modify Hold**.

![Modify Hold Window](image.png)

5. From this window, you can change the Pickup library, expiration date, add comments, as well as change the Pickup by date. The Pickup by date is an especially nice option, as this enables staff to allow an item to sit on the hold shelf longer than usual, when necessary for a patron.

6. After making the desired changes, click **OK**.

7. A window will appear letting you know if there is an action that must be taken.
   
   a. If something like the Pickup by date is changed, no action is needed.
   
   ![Next Action Window](image.png)
   
   b. If the Pickup library is changed, then a transit message will appear. The associate slip will also print, assuming it has been configured for this wizard.
When an action is required, the title will move from the top list, to the lower list, as well.
To clear items off of the hold shelf that have become inactive, canceled or expired

The Process Selected Inactive Holds button is the equivalent of the Clean Holds Shelf report, when the Trap and Transit boxes are unchecked. Here you are seeing the list and handling the manual step of trap/transit.

1. Open the Manage Hold Shelf wizard.
2. Select the Inactive holds from the list.
3. Click Process Selected Inactive Holds.
   a. If the hold was Expired, the system will tell staff what to do with the item, such as send it back to the owning library.

To print selected holds that are on the hold shelf

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

To Reprint hold slips

1. Open the Modify Hold Shelf wizard.
2. Select the desired Title(s).
3. Click the **Reprint Hold Slip(s) button**.

The options we just reviewed, as well as a few more are available via the right-click menu:
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.
The Cash Management group of wizards enables the library to perform simple point of sale-style transactions such as sales, refunds, voids, and no sales as well as producing till summaries. This is intended for a library storefront, in which the library sells books and other items.

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

**Cash Management Wizard**

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

*To make a sale:*

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

2. Scan or type the **User ID**.

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

4. Click the “**Complete Transaction**” button.

5. Enter the applicable amount in the **Payment Amount field**.

6. Select a payment type from the **Payment Type drop-down** list.

7. Click “**Add Payment**”.

8. Click “**Submit Payments**”.

---

**Symphony Circulation Training Guide, Page 94**
9. If the amount paid is greater than the amount owed, a dialog box noting the amount of change owed to the user displays.

**Paying Bills**

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

**To add a user’s bills to the sale**

1. Click the “Add a user’s bills to the sale” helper.

2. Select which bills you would like to add to this transaction.

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

Ad hoc Sales

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

*To add an ad hoc sale item*

1. Click the “Add an ad hoc sale item” helper.

2. Type a *description* of the item being sold, the *unit price*, and the *quantity* of items being sold.

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

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

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

To make a refund or void transaction

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

2. Click the “New void” or “New refund” button as appropriate.

3. Complete steps 2-8 of “To make a sale” above, to complete a void or refund.
Opening the Cash Drawer for a “No Sale”

If staff need to open the cash drawer, without making a sale, the “N

To make a no sale

1. After opening the Cash Management wizard and before scanning a user ID or Item ID, click the “Start New Transaction” button.

2. Click the “New no sale” button.

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

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

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

To view a the daily sales summary

1. Open the Till Summary wizard from the Cash Management group.
2. Click “Summary of sales for day” or “Summary of shift sales” as appropriate.
3. Open the “File” menu; and click the “Print Screen” option to open the summary in the application specified in Print Setup for printing and modification.
Note: If you have a receipt printer configured the “Print summary to receipt” button will also be displayed which will allow you to print the summary directly from WorkFlows.

4. Print the summary.

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

1. Open the *Till Summary wizard* from the Cash Management group.

2. Click “Summarize and close shift”.

3. You will see a dialog box asking you to confirm that you want to close out the shift. Click “Yes”.

4. Open the “File” menu and click the “Print Screen” option to open the summary in the application specified in Print Setup for printing and modification.
Note: If you have a receipt printer configured the “Print summary to receipt” button will also be displayed which will allow you to print the summary directly from WorkFlows.

5. Print the summary.

```
Till Summary 02/12/2013

Library Name: Armagh Library
Station Name: PC Graphical User Interface (Display Mode)
Starting Time: 2/12/2013, 0:00

<table>
<thead>
<tr>
<th>Payment Type</th>
<th>Transaction Type</th>
<th>Amount</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paid with currency</td>
<td>Sale</td>
<td>£65.10</td>
<td>1</td>
</tr>
<tr>
<td>Paid with currency</td>
<td>Total</td>
<td>£55.10</td>
<td></td>
</tr>
<tr>
<td>Agreed error</td>
<td>Refund</td>
<td>-£3.00</td>
<td>1</td>
</tr>
<tr>
<td>Agreed error</td>
<td>Total</td>
<td>-£3.00</td>
<td></td>
</tr>
<tr>
<td>Grand Total</td>
<td></td>
<td>£62.10</td>
<td></td>
</tr>
</tbody>
</table>

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

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

With this appendix, you will learn to:

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

The Circulation Sets feature includes the following wizards:

- Add Circulation Sets
- Display Circulation Sets
- Modify Circulation Sets
- Remove Circulation Sets
Adding a Circulation Set

To create a circulation set:

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

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

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

4. In the Call Number/Item tab, highlight the copy you want to include in the set.
5. Click OK.

6. Repeat steps 2-6 until you have all of the items needed for the circulation set.

7. Type in a Set ID, or allow the system to auto-generate a set ID.

   If you would prefer to use one of the item barcodes to check out the entire set, do the following:

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

9. Highlight one of the items in the List of Items in Set and click Make Parent.
Choose a category from the list, if necessary.

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

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

13. Select Add Set.

14. Click OK.

15. Select Close.

Checking Out a Circulation Set

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

To check out a circulation set:

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 parental item’s barcode in the Item ID field, or type the Set ID and click Check Out Item to User.
4. Click Close.

Displaying Circulation Sets

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

**To display a circulation set:**

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

2. Type in the **Set ID**, or use the *Search by Search Set ID* helper to find the set.

<table>
<thead>
<tr>
<th>Title</th>
<th>Item ID</th>
<th>Date Due</th>
<th>Billed</th>
<th>Amount Paid</th>
<th>Type</th>
<th>Set ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>To kill a monk</td>
<td>33970000182...</td>
<td>11/8/2010</td>
<td></td>
<td></td>
<td>DVD</td>
<td>BOOK-CLUB</td>
</tr>
<tr>
<td>To kill a monk</td>
<td>33970000182...</td>
<td>11/20/2010</td>
<td></td>
<td></td>
<td>BOOK</td>
<td>BOOK-CLUB</td>
</tr>
<tr>
<td>To kill a monk</td>
<td>33970000182...</td>
<td>11/20/2010</td>
<td></td>
<td></td>
<td>BOOK</td>
<td>BOOK-CLUB</td>
</tr>
<tr>
<td>To kill a monk</td>
<td>33970000182...</td>
<td>11/20/2010</td>
<td></td>
<td></td>
<td>BOOK</td>
<td>BOOK-CLUB</td>
</tr>
<tr>
<td>Understanding</td>
<td>33970000149...</td>
<td>11/20/2010</td>
<td></td>
<td></td>
<td>BOOK</td>
<td>BOOK-CLUB</td>
</tr>
</tbody>
</table>
3. After viewing the set, click **Close** to exit the wizard.

You can also use the *Item Search and Display* wizard to view circulation sets. Set ID is available in the Index dropdown or search by title to view a set.
Modifying a Circulation Set

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

**To remove an item from a circulation set:**

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

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

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

4. Click **Save Set**.

5. Click **OK**.

To add an item to a circulation set:

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

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

3. Scan in the barcode of the item you want to add or type in the item ID and click **Add Item to Set**. You can also use the **Item Search** helper to locate the item to add to the list.
4. Once you have added all of the required items, click **Save Set**.

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

### Removing a Circulation Set

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

**To remove a circulation set:**

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

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

3. Click **Remove This Set**.
4. Click Yes.
5. Click OK.
6. Click Close.
Credit User Accounts

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

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

**Refunding Paid Bills**

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

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

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

When displaying a user’s record in the Display User wizard, the Credit Balance will appear in the Summary tab.
Specific information about the credit balance can be found by clicking the Display the Full Credit Account Transaction History helper.

To manually refund a paid bill:

1. Open the Special group of wizards, and click the Credit User Account 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 Manual Refund helper.
4. Select the bill or bills you want to refund.

5. Click OK.

6. Click Cancel.

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

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

To withdraw funds for a paid lost item:

1. Within the Special group of wizards, click the Credit User Account 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 Manual Withdrawal helper.
4. Specify the amount of money to be withdrawn from the credit account, the payment type, and the credit reason (the reason for withdrawal).

5. Click **Withdraw Funds**.

6. Do one of the following:
   - If the remaining credit account balance is greater than $0.00, a dialog box displays the current remaining account balance. Click **OK** to close the dialog box and return to the wizard.
   - If the remaining credit account balance is $0.00, a dialog box displays and asks if you want to close the user’s credit account. Click **Yes** to close the account, or **No** to keep the credit account open. After clicking **Yes** or **No**, you are returned to the wizard.
Closing a User’s Credit Account

To close a credit account:

1. Within the Special group of wizards, click the Credit User Account 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 Manual Withdrawal helper.

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

5. Do one of the following:

   • If the user’s balance is currently $0.00, click Close Account.

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

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

6. Click OK to confirm the account has been closed.
Offline Circulation

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

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

Using Offline

The following conditions apply to offline:

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

To log into Offline mode:

1. Start the SirsiDynix Symphony Workflows client.
2. In the Configuration window, select the Operate in Offline Mode check box.
3. Click OK.
4. Select the Offline toolbar.

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

To establish Offline session settings:

1. Click the Offline Session wizard.

   ![Offline Session Wizard]

2. In the User Access list, select the user to associate with the offline transactions, typically CIRC. This is a required field.
3. In the Library list, select the home library. This is the library associated with the transactions that are ultimately loaded. This is a required field.
4. Accept the default values Current Date and Current Time. Transactions recorded at the workstation will be stamped with the PC time.
5. If necessary, enter a Default Due Date using the gadget. When you leave this field blank, WorkFlows will calculate the due date when the administrator loads offline transactions to the server.

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

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

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

8. Click **OK**.

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

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

To check out materials in offline:

1. In the Offline toolbar, click the Checklist wizard.

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

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

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

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

6. Continue entering barcodes until all items are checked out.
7. When you are finished checking out to the user, click **Check Out To New User** to check items out to a different user or click **Close** to exit the wizard.

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

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

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

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

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

To discharge materials in offline:

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

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

3. Scan the item’s barcode or type in the Item ID and click OK.

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

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

Renewing Items Offline

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

To renew items in offline:

1. In the Offline toolbar, click the Renew Item wizard.
2. If necessary, click the *Alt Due Date* gadget to set a different due date than the one you may have set in the session settings.

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

4. Continue entering barcodes until all items are renewed.

5. Click **Cancel**.

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

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

To renew reserve items in offline:

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

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

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

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

5. Continue entering barcodes until all items are renewed.

6. Click Cancel.

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

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

To register a user in offline:

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

2. Enter the user information in the User Information tab. The following fields are required:
   - User ID
   - Last Name
   - Library
   - User Profile
   - Language

3. Add address information about the user on the User Address tab.

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

5. Click OK.

6. Click OK.

7. Click Cancel.
Going Back Online

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

To send offline transactions to the server:


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

3. Click **OK**.

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

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

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

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

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

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

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

To create a new user and assign them to a group:

1. Navigate to the Circulation toolbar and open the Users group of wizards.

2. Click the User Registration wizard.

3. Select a Profile Name using the dropdown, if necessary.

4. Enter the user information in the available tabs and fields.

5. Click the User Groups tab.

6. Perform one of the following actions:

   • To create a new group name, enter the Group Name into the field.

   • To add this user to an existing group, click the Group Name gadget, search for and select the name, then click OK.

7. With the dropdown, change the Responsibility Policy, if necessary.

8. Make any necessary changes to the Responsibility Type options.
9. Click Save.

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

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

**To display user group information:**

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

2. Search for a user within the same group.

3. To view the user group bills, click the *Display User Group Bills helper.*
4. When finished viewing the information, click **Cancel**.

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

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

7. To view the items on hold for the user group, click the **Display User Group Holds** helper.
8. When finished viewing the information, click **Cancel**.

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

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

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

**To place a hold that will be mailed to a user:**

1. Open the Holds group of wizards and click the Place Holds wizard.
2. Search for the user who is placing the hold.
3. Search for the item they want to place on hold.
4. Select the “Mail Item to User” check box.

5. Using the dropdown, select the Delivery Method.
6. Make any other necessary selections.

7. Click **Place Hold**.

8. Click **Close**.

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

**To check out a book to be sent by mail:**

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

2. Scan the barcode of the item.

3. Do one of the following:

   - If the user already has an existing package scheduled for mailing, the *Shipping Package Already Exists* dialog box displays the user ID, the user’s name, the tracking number of the existing package, and the existing package information. The current item can be added to an existing shipping record by clicking **Yes**, or you can create a new shipping record by clicking **No**. If **Yes**, the existing Tracking Number will appear.
• If there is no existing package, type a new Tracking Number. The maximum length of this field is 80 characters. When the tracking number is entered, the Confirm Shipment button is activated and is the default action when you press Enter.

4. Type in a comment, if desired.

5. Click Check Out Item To User.

6. If you are ready to ship the package, click Confirm Shipment.
7. Click OK.

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

9. Click Close.
Exercises

Exercise 1. User Creation

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

*Note down the User ID and name of each user.*

Exercise 2. User Editing

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

*Note down the User ID and name of each user.*

Exercise 3. Check Out with No Card

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

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

*Note down the Titles.*

Exercise 4. Check Out with Modified Due Date

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

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

*Note down the titles.*

Exercise 5. Renewal

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

- There are two renew wizards. Which is best for this situation?
Exercise 6. Holds

User two would like to checkout a book. However, he can't find it on the shelf.
- Is it available? Be sure to verify first.
- Since the item is checked out, he/she would like to get in line for it.
- Create the hold.
- Repeat for an item that is on the shelf.

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

Exercise 7. Brief Title Add

A user asked you to borrow a book from another, outside institution. It has arrived. Create a Brief record for the title.
- Remember to always check the property settings (should it be shadowed?).
- Title: Giving Back
- Author: Sharon Abunch
- Owning Institution: SD Library

Exercise 8. Checkout the ILL

Checkout “Giving Back” to User 1.

Exercise 9. Blanket Hold

User one just came running in. She is getting a late start on the literature assignment. She needs two books with “holiday” in the subject. However, they are all checked out by the more prompt students. She will happily take the first two that come in.
- What is the best hold wizard for this process?
- Look at the Display User wizard, after creating the blanket hold, to see how that worked. Maybe check some in to follow it through.

Exercise 10. Onshelf Holds

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

Exercise 11. Cancel a Hold

Cancel the first hold you placed in exercise 5.

Exercise 12. Clean the Holds Shelf

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

Hint: This is handled with Reports.
Exercise 13. Lost

User 2 has lost one of the items checked out earlier.
- Mark it lost.
- Create the bill.
- Take a partial payment.

Exercise 14. Display User

User 2 has returned arguing that the bill was paid in full. How can you look that up?
- While you are at it, she would like a print out of the details of her account. Do you see a helper that can do this?

Exercise 15. Paying Bills with the Right-click Menu

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

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

Exercise 16. Transits

What is in Transit to your library?

Exercise 17. Lost Card Checkout

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

Exercise 18. Ephemeral

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

Option 1: You wish to keep track of a box of a “take one/leave one” box.
- Do you care to know who took one? Or only that one was taken?

Option 2: You wish to keep track of who is taking the tax forms, but don’t want to check them out.
- In this case, you want to know who is taking them, as other counties may have to pay when their patrons come to your library for services.

Option 3: You wish to track computers or photocopies.
- Do you care to know who took one? Or only that one was taken?
Exercise 19. Mark Item used

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

Exercise 20. Modifying Due Dates and Holds

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

Exercise 21. Duplicate a User

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

Exercise 22. Change Hold Pickup Library

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

Exercise 23. Checking User’s place in Hold Queue

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

Exercise 24. Printing a List of Checkouts for a User

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

Hint: There is a Helper for this.

Exercise 25. New User Checkout and Hold

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

Exercise 1. User Creation

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

Exercise 2. User Editing

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

Exercise 3. Check Out with No Card

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

*You will be working with these items later, so be sure to note the title or item ID.*
Exercise 4. Check Out with Modified Due Date

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

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

Exercise 5. Renewal

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

Exercise 6. Holds

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

Exercise 7. Brief Title Add

1. Right-click on the **Add Brief Title wizard**.
2. Ensure “**Shadowed**” is checked.
3. Click **OK**.
4. Open the **Add Brief Title wizard**.
5. Enter the desired info.
   - **Title**: Giving Back
   - **Author**: Sharon Abunch (you may also wish to note the Owning Institution: SD Library for ILLs)
• You can choose the appropriate item details. Be sure to note your Item ID for the next exercise.

6. Save.

Exercise 8. Checkout the ILL
1. Open the Checkout wizard.
2. Scan the User’s ID.
3. Enter the Item ID from Exercise 6.

Exercise 9. Blanket Hold
1. Open the Blanket Hold wizard.
2. Enter User 1’s ID.
3. Enter 2 for the number of items needed.
4. Click OK.
5. Look up at least three items to add to your list.
6. Click Add to List.
7. Click Place Hold.
8. Check your work in the Display User wizard.

Exercise 10. Onshelf Holds
1. Open the Onshelf Holds wizard.
2. Pretend you have gone out to grab the titles there. Click Trap on a few titles.

Exercise 11. Cancel a Hold
1. Open the Remove User Holds wizard.
2. Enter the User ID from one of the User’s you placed a hold for above.
3. Select an Item; and click Remove Holds.

Exercise 12. Clean the Holds Shelf
1. In real life, the Clean Holds Shelf Report will already be run for you to grab from the Finished Reports wizard. This report looks for items that are on the holds shelf that have been there too long, passing the expiration date. The report that finds those is “Expire Available Holds” report.
   i. This may or may not be the case on the system you are working on. If it is not in the Finished Reports wizard:
      1. Open the Schedule New Report wizard.
      2. Open the Circulation group of reports.
3. Run the **Expire Available Holds report** (open the report and click “Run Now”).

4. Run the **Clean Holds Shelf Report** (open the report and click “Run Now”).

2. Open the **Finished Reports wizard**.

3. View the **Clean Holds Shelf Report**.
   i. Copy a barcode from this report.

4. Enter the barcode from the report in the **Trap Holds wizard**.

**Exercise 13. Lost**

**Option 1**

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

**Option 2**

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

**Exercise 14. Display User**

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

**Exercise 15. Paying Bills with the Right-click Menu**

1. Continuing with steps 1-3 from the exercise above, **right-click** on the bill.
2. Select **Pay Bills** from the menu that displays.
3. Note the remaining bill amount.
4. Enter that amount in the **Payment field**.
5. Select a **Payment type**.
6. Click the **Pay Bills** button.

**Exercise 16. Transits**

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

**Exercise 17. Lost Card Checkout**

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

**Exercise 18. Ephemeral**

**Option 1:**

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

**Option 2:**

1. Create a Title called “Tax Forms” with the **Add Brief Title wizard**.
   i. Make the ID easy to remember, such as TAXES
2. Open the **Ephemeral wizard**.
3. Enter User 1’s ID.
4. Enter the Item ID from #1.
5. Enter the number of forms taken.
6. Click Checkout Item to User.
   Option 3: This depends on whether you care to track who the item was checked out to. The steps will either match option 1 or 2.

Exercise 19. Mark Item used

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

Exercise 20. Modify Due Dates and Holds

1. Open the Modify Due Dates wizard in the Special group and look up User 2.
2. Click on the Select All and Apply Same Due Date checkboxes.
3. Using the gadget next to the Due Date field, select the appropriate due date and click OK.
4. Click on Modify User Due Dates.
5. Next, click on the Modify Holds for User wizard in the Holds group and look up User 2.
6. Click on the Select All checkbox; and click Modify.
7. In the Date Suspended and Date Unsuspended fields, enter the range of time when the user will be away from home. Click OK.
   Note that these functions could also be done for one item at a time using the right-click menu in the Display User wizard.

Exercise 21. Duplicate a User

1. From the Circulation Toolbar > Users group, open the Duplicate User wizard.
2. Search for the parent’s name (any user in the system).
3. From the search results, highlight the parent’s record and select Clone/Copy User.
4. Enter a new User ID for this record.
5. Complete the information that is unique or different from Parent (PROFILE, PIN, Demographics, email).
6. Click Save.
Exercise 22. Change Hold Pickup Library
1. If you have an existing hold, skip to step 2. If not, place a hold.
2. From Circulation Toolbar > Users group, click on Display User.
3. Display the user from step 1.
4. Navigate to the Holds tab.
5. Right-click on the hold just placed.
6. Select Modify.
7. Using the Pickup at dropdown choose a different library for pickup
8. Click Okay.
   
   NOTE: There are other ways this could be done, including the use of the Modify Holds for User or Modify Holds for Item.

Exercise 23. Checking User’s place in Hold Queue
1. This can be seen from the Reorder the Hold Queue wizard (not all libraries choose to enable this wizard). Or, from the Display Title Holds wizard.
2. Search for the title placed on hold in Exercise Six.
3. Find User 2 on the list, count how many patrons are ahead of them in the queue.

Exercise 24. Printing a List of Checkouts for a User
1. Click of Display User.
2. Using either the User Search Helper in the upper left hand corner or typing in the User ID in the appropriate field, display User 1 or User 2.
3. Once the User’s account is displayed, select the Print helper [Printer Icon].
4. Check the boxes next to list of checkouts, list of bills, and list of holds.
5. Press Print.

Exercise 25. New User Checkout and Hold
Register a new user/Cko item:
1. Open Checkout wizard.
2. Open Register New User helper.
3. Register user, selecting the Public user profile, and adding all the information you would normally add for one of your patrons.
4. Click Save.
5. Use the Item Search Helper to select an item for checkout. You can use any item for this exercise.
Place hold for user:

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