



SIRSIDynix WorkFlows & e-Library Training Guide

Circulation

Magale Library Student Worker

July 2013

Table of Contents

Introduction

Wizards and Helpers

Searching Basics

Displaying and Searching for User Records

User Statuses

Displaying and Searching for Item Records

Check Item Status

Circulation Tasks

Checking Out Materials

Renewing Materials

 Renew User Wizard

 Renew Item Wizard

Checking In Materials

 Check In Wizard

 Discharging Bookdrop Wizard

Viewing and Placing Items in Transit

e-Library

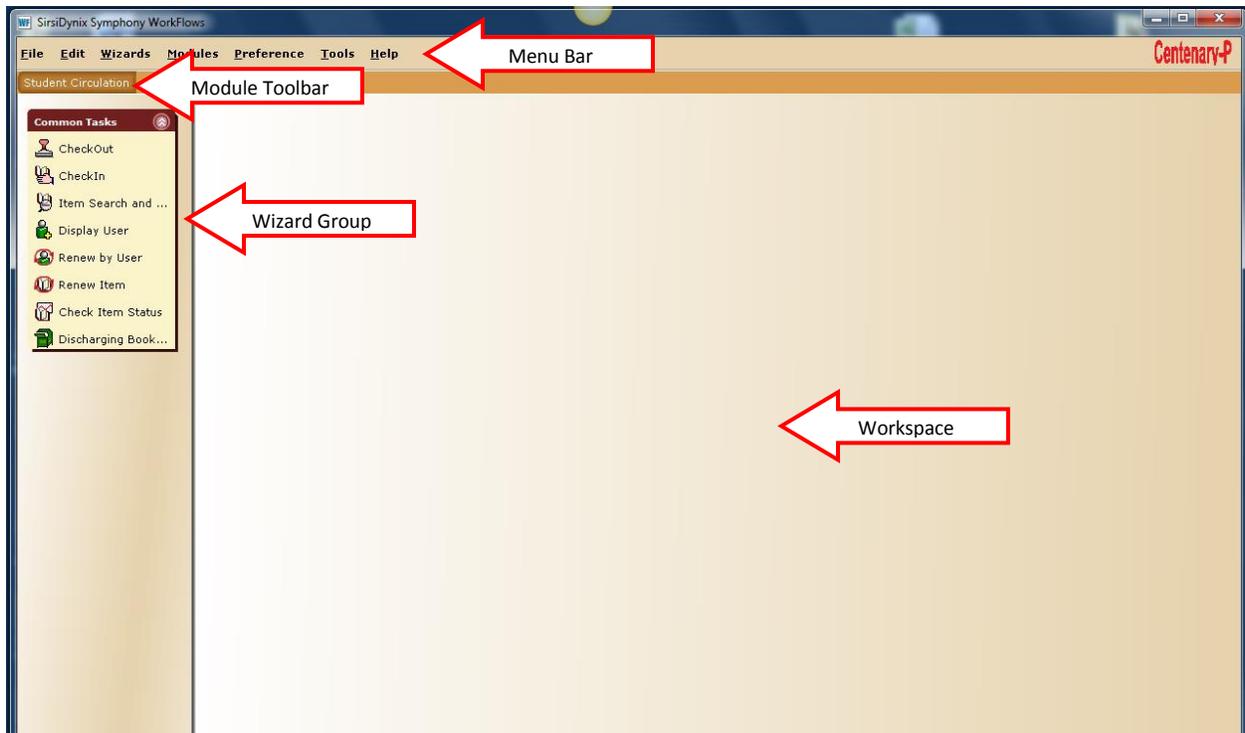
Introduction

The Student Worker Circulation Training Guide will provide an understanding of the SirsiDynix Symphony Circulation module capabilities and e-Library, its accompanying user interface. This training guide can accompany instructor-led training or it can also be used as a review, reference, or independent study document. The goal of this guide is to train Magale Library student workers so that they will be familiar with their primary functions in circulating collection materials and assisting library patrons in using e-Library.

The circulation manual consists of four sections. Below is a short summary of each section:

- **Introduction** – Navigating the circulation module
- **Searching Basics** – Displaying user and item records
- **Circulation Tasks** – Details the steps for checking out, renewing and checking in materials
- **e-Library** – Navigating the user interface

The purpose of this training guide is to provide quick and accurate information about using the SirsiDynix Symphony system. This introduction begins with an orientation to the screen layout and how to navigate within the system. When opening SirsiDynix Symphony, a screen like this displays:



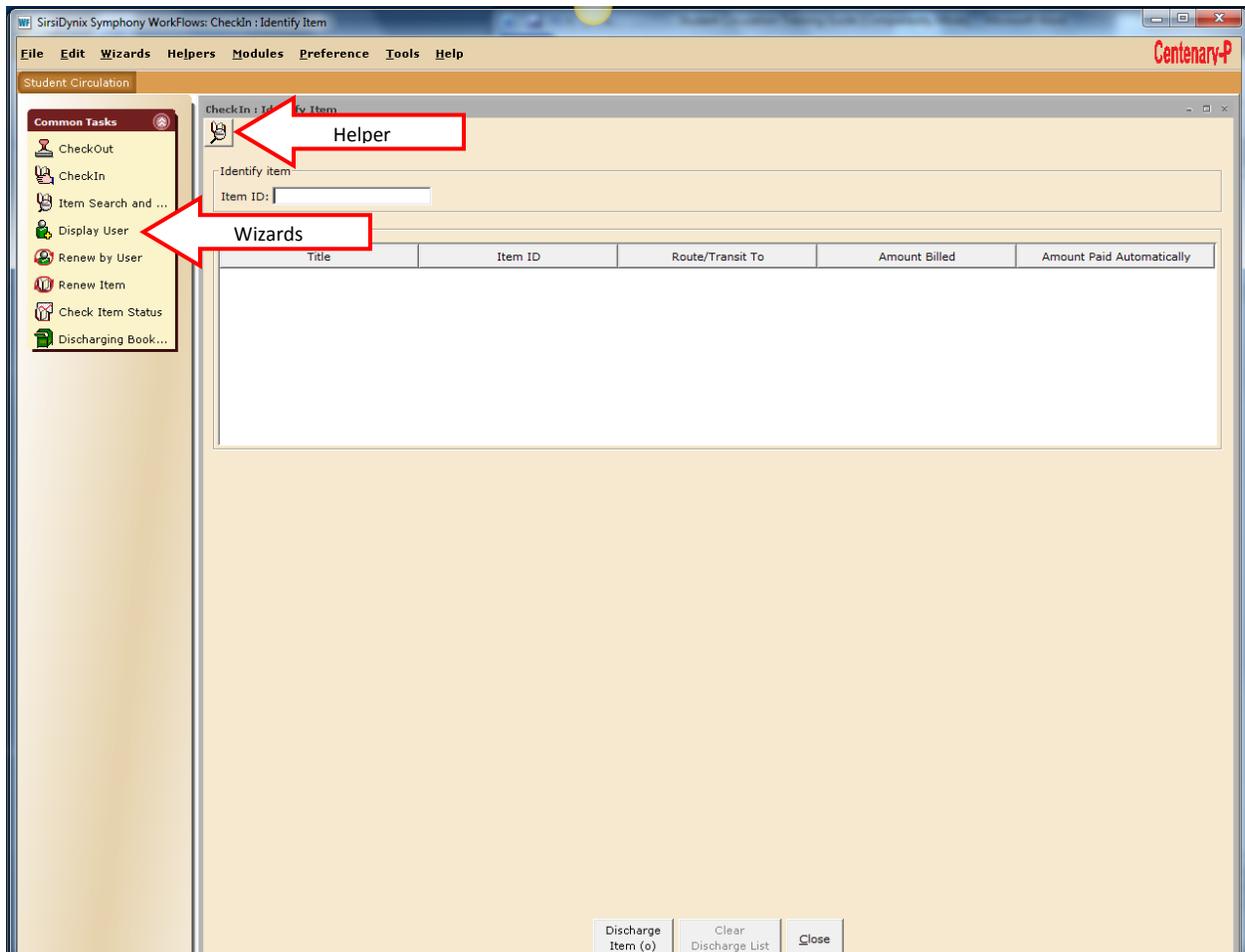
These are the parts of the Symphony screen, as pointed out in the preceding screen shot:

- **Module Toolbar** - Grants access to available modules. Only modules relevant to your job will display. Move between modules by clicking on the module toolbar.
- **Menu Bar** - Provides tools 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. 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. If you try to open multiple wizards at once, you may be prompted to close one before you are able to open another.

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 description when you hover over the icon.

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



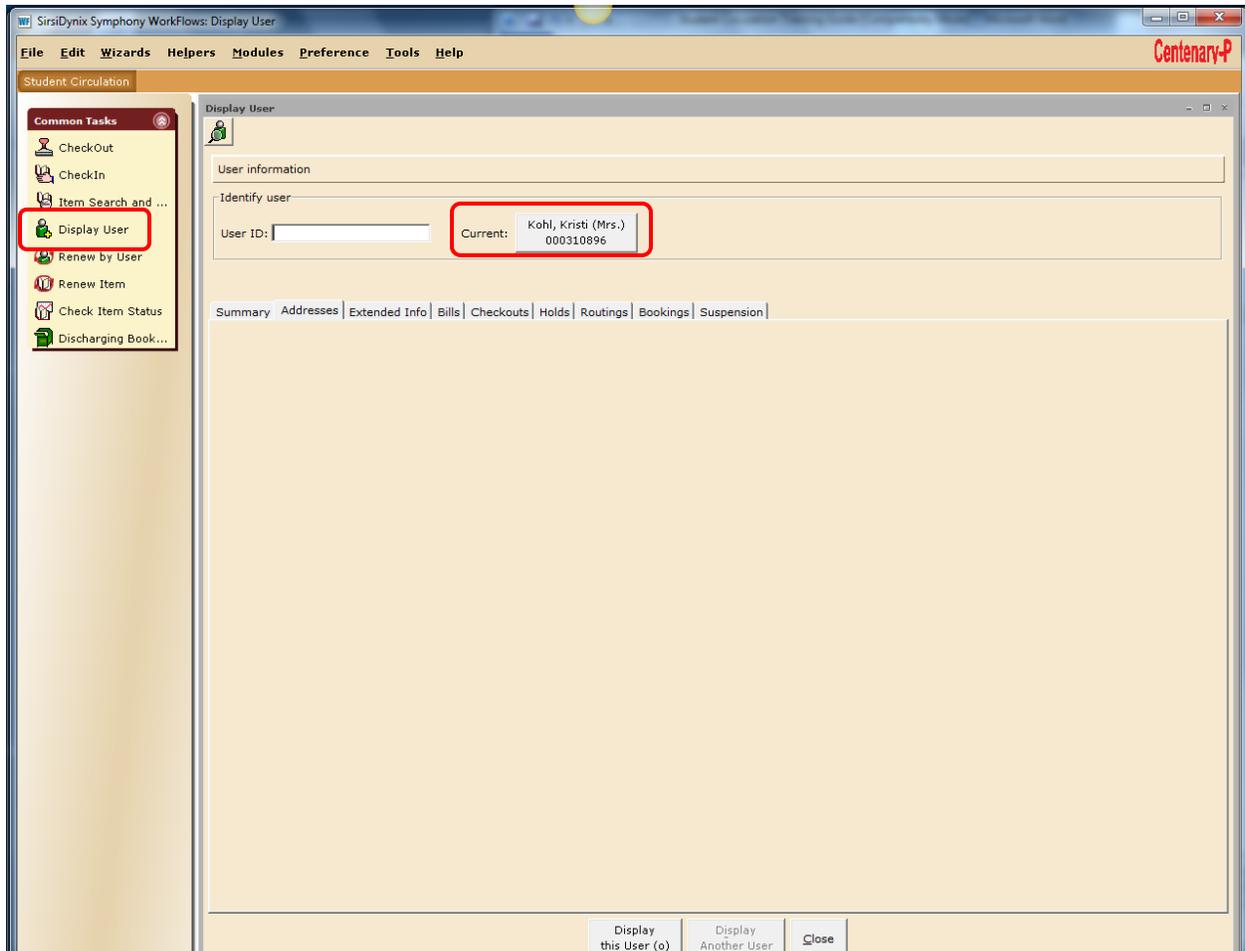
The *Check In* wizard is the tool you would use when performing CheckIn-related workflows.

Searching Basics

Searching for records within the SirsiDynix Symphony client is straightforward. In each case you are searching the database for records—once you find the desired record you put it to use in the current workflow. This section reviews the basics of searching for and selecting records in SirsiDynix Symphony.

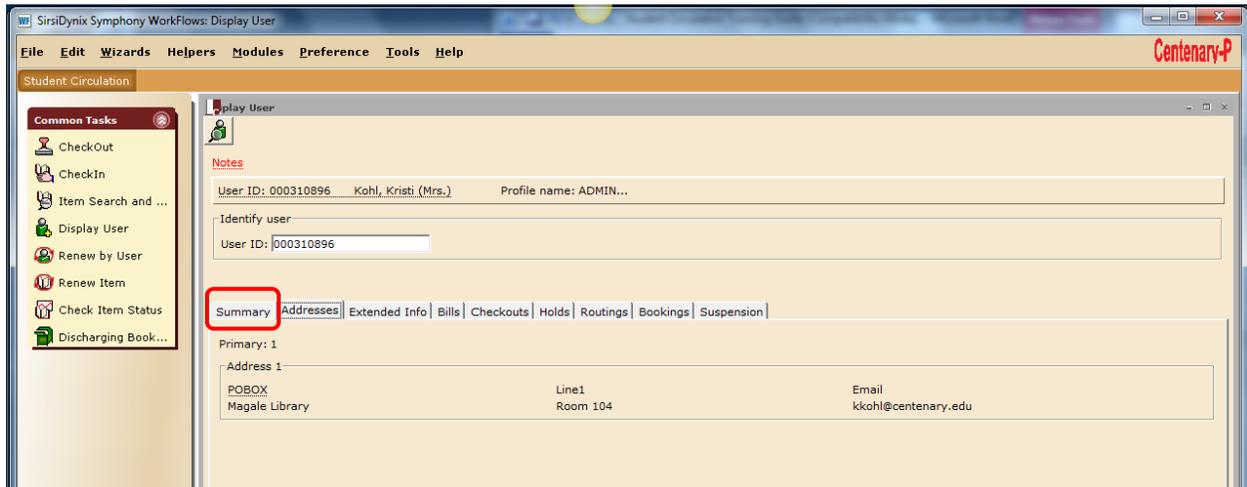
Displaying and Searching for a User Record:

1. To view user information such as status, checkouts, bills, holds, and extended information, click on the *Display User* wizard. Notice that the most recent (current) borrower displays by default.



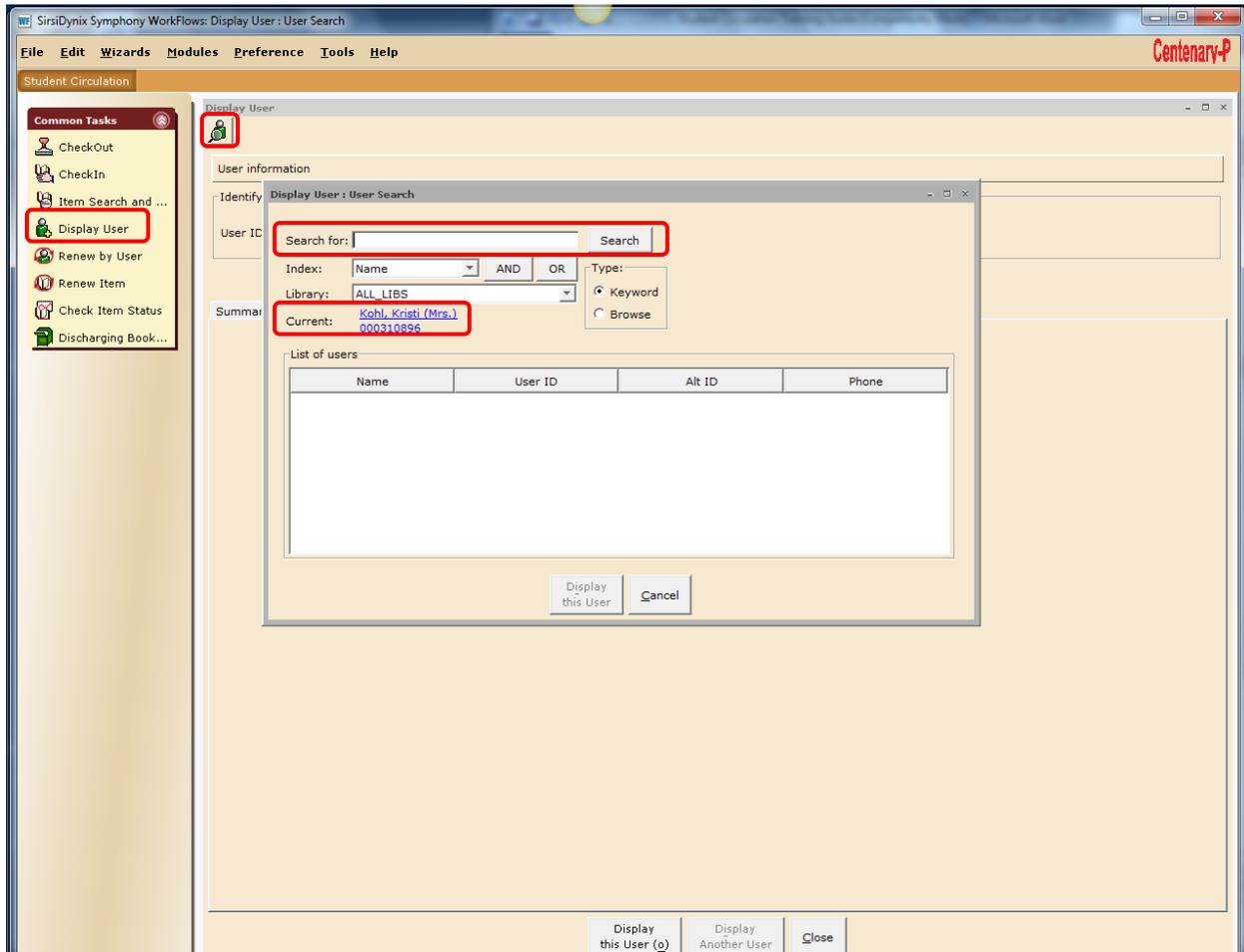
2. Scan the barcode from the user's card, or type the User ID and click *Display This User*.

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



If the patron does not have his/her student ID, you can search for a user record *if another form of identification is provided*:

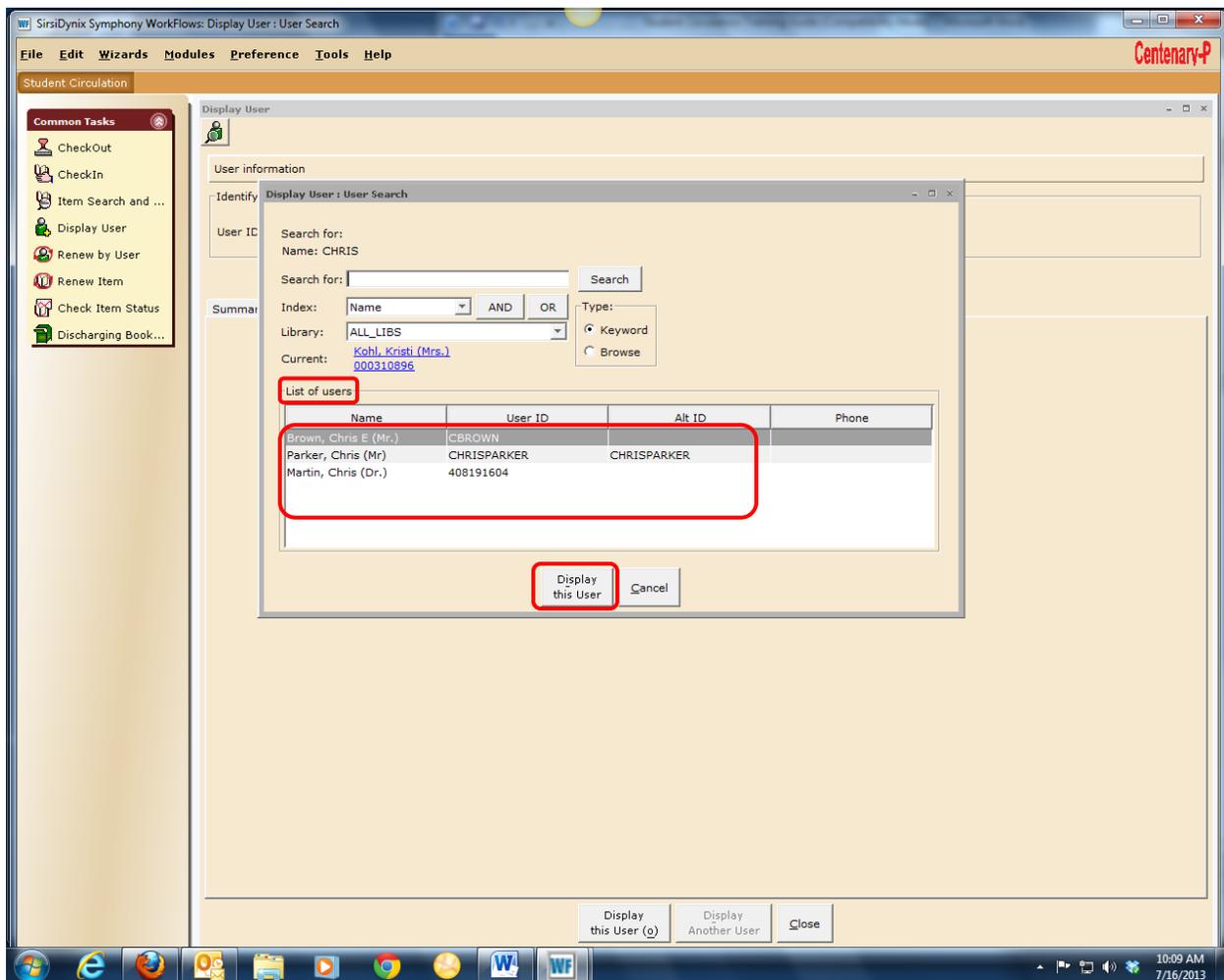
1. Open the *Display User* wizard.
2. Click on the *User Search* helper at the top of the Checkout window. A user search pop-up like this one displays:



The *User Search* helper is highlighted at the top of the window. Within the *Search* window there are options to specialize a search by index, Boolean operators, library, or type.

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

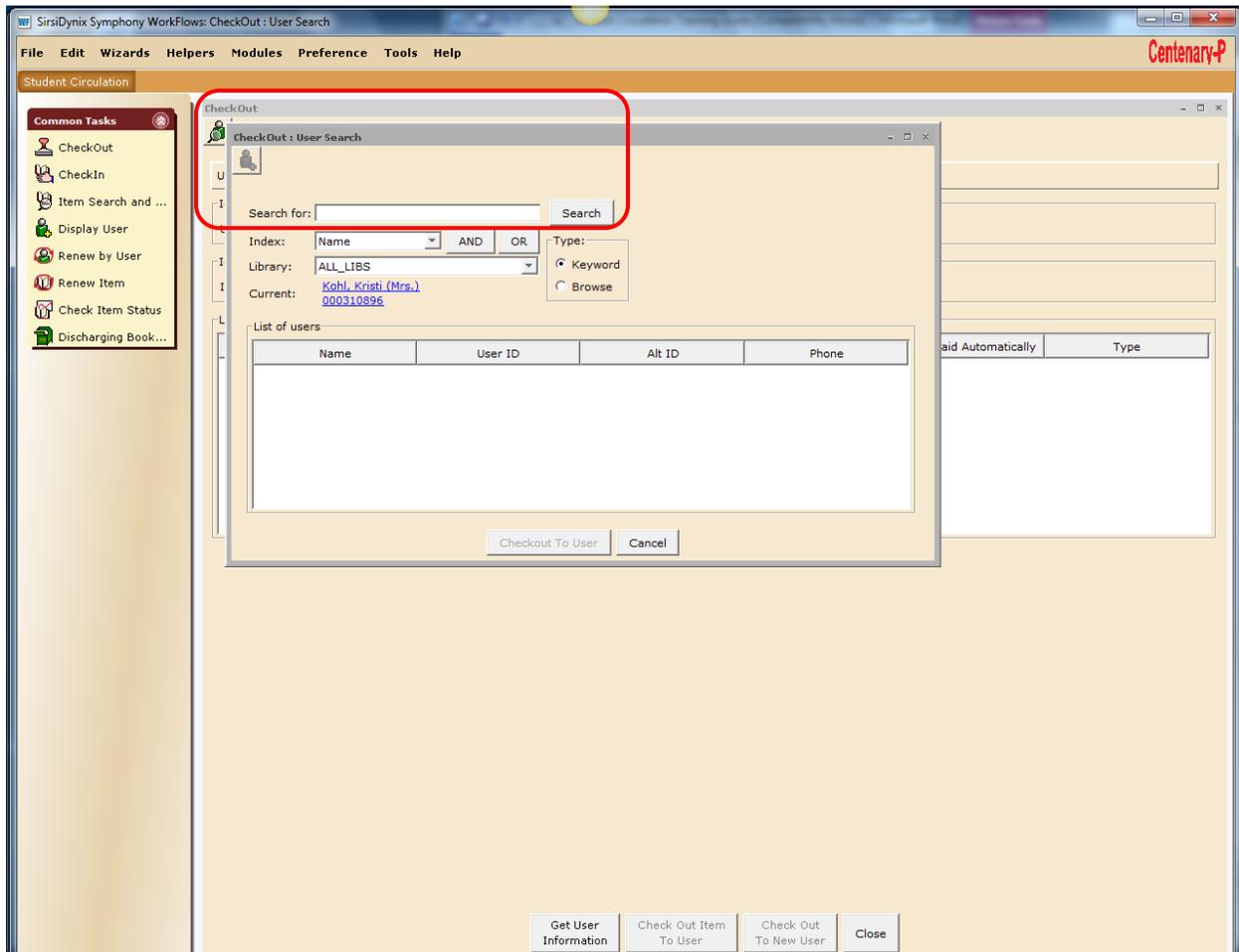
The system displays the results of your search. Notice that the most recent (current) borrower displays by default.



7. If your results display multiple users, highlight the correct user and click *Display this User* to view the individual record.

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

NOTE: You can also conduct a *User Search* within the *CheckOut* wizard as shown in the image below:

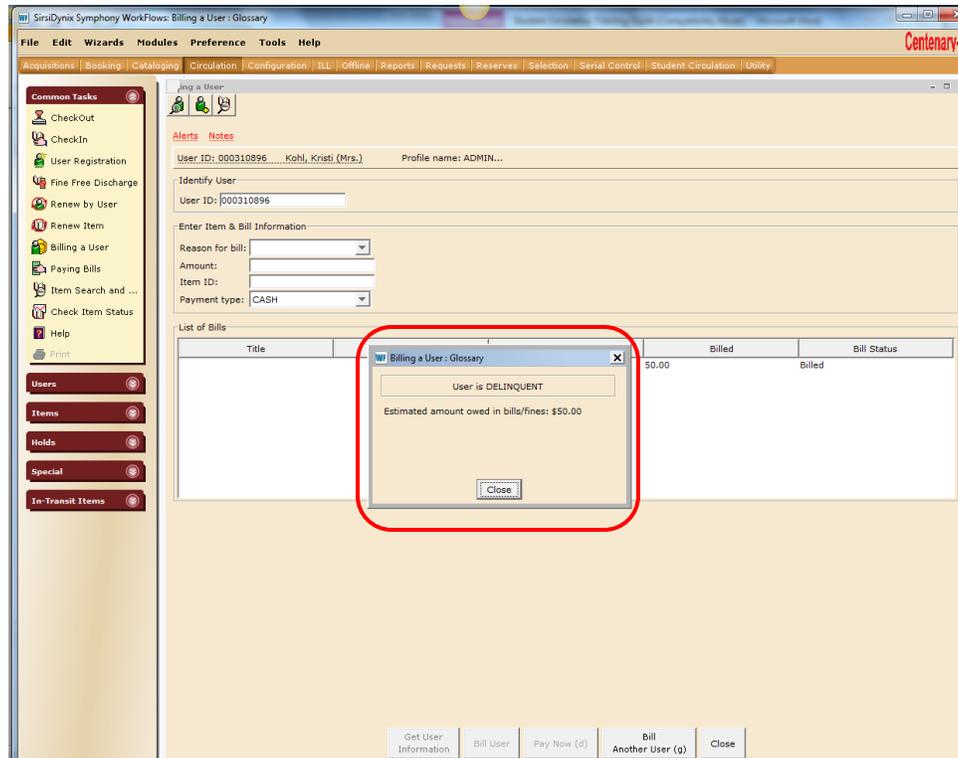


User Statuses

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 set up 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.



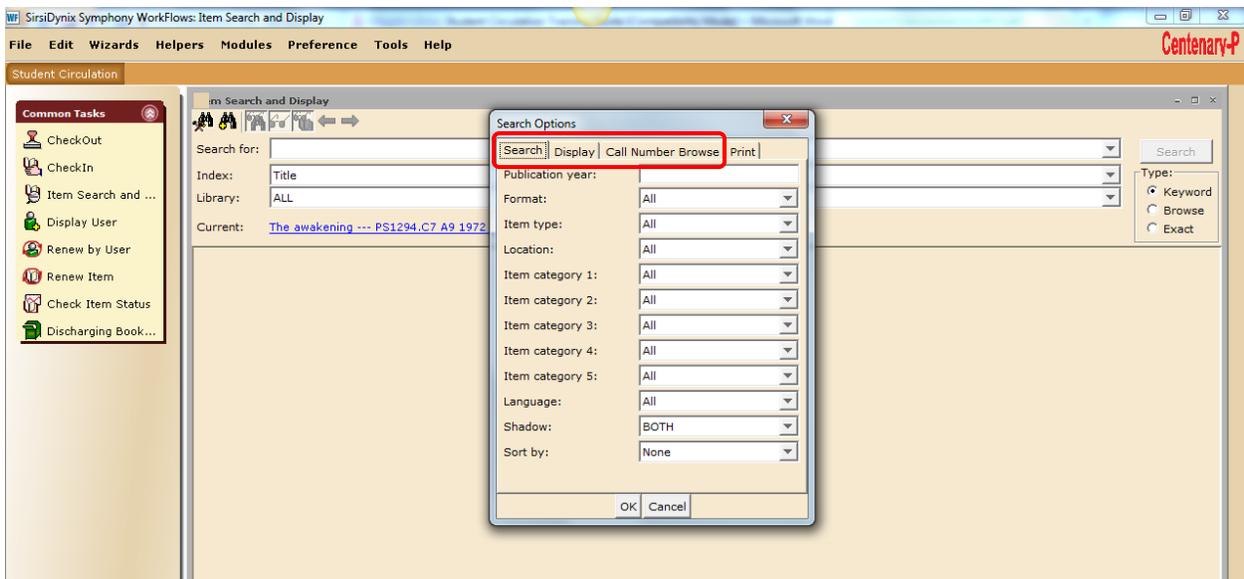
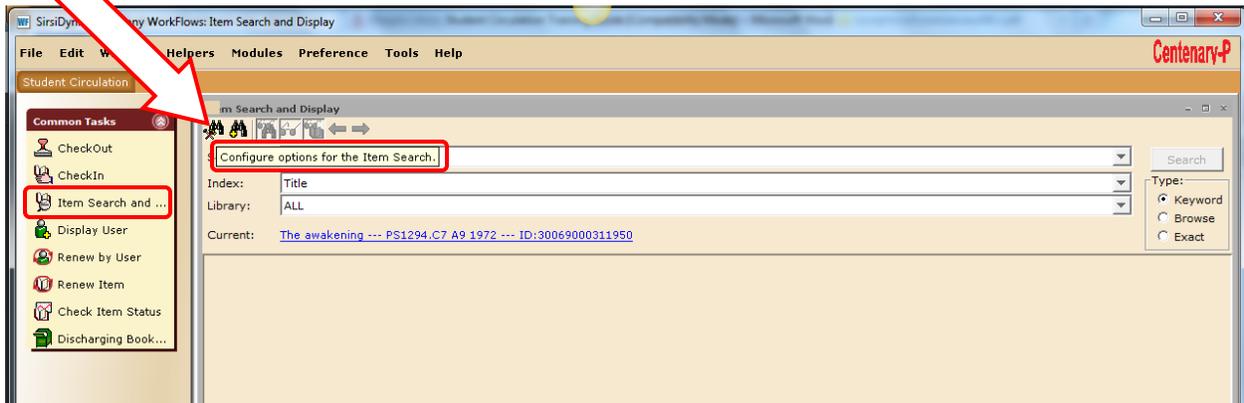
BLOCKED – User has unpaid bills or number of overdue items over the thresholds set up in circulation policies. The user can check out items only if an override code is supplied. Contact the Circulation supervisor or another library staff member.

BARRED – The user cannot check out items. The BARRED status must be added and removed manually with an override code before the user can check out items. Contact the Circulation supervisor or another library staff member.

Displaying and Searching for Item Records:

Two helpers display on the *Item Search and Display* window, the *Configure Options for Item Search* and the *Advanced Search*. These helpers provide focus and limits on the searches conducted.

The *Configure Options for Item Search* helper qualifies the search method selected to conduct the search allowing users to limit their search. Click this helper to display the following windows:



- *Search* - Limits and sorts a Search lookup method based on volume/copy characteristics.
- *Display (Exact)* – Limits and displays search results based on individual item characteristics. Settings in this field govern the display of individual items retrieved from an Exact search.
- *Call Number Browse* - Limits the headings that are retrieved in a call number browse search.

NOTE: WorkFlows retains search, display and call number browse settings until you change them or close the wizard. Leaving the settings in place may disqualify future searches, and you may receive the following message:



EXAMPLE: A search on General keyword “art” and Item type of e-book retrieves 13 records.

Search for: art
 Index: General
 Library: ALL
 Current: [The awakening --- PS1294.C7 A9 1972 --- ID:30069000311950](#)

KEYWORD General art, ALL: 13 records

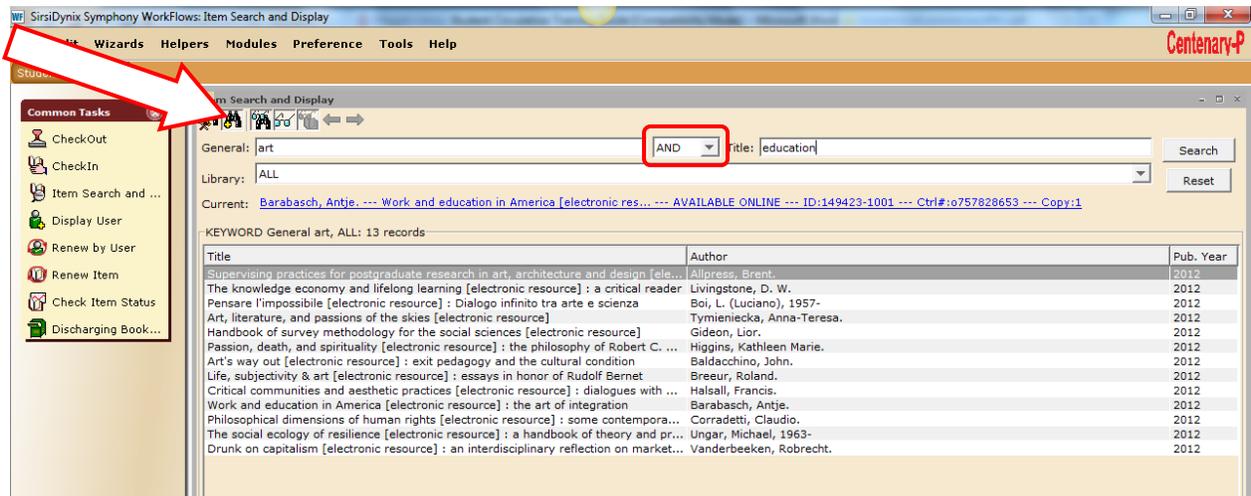
Title	Author
Supervising practices for postgraduate research in art, architecture and design [electronic resource] : a critical reader	Alipress, Brent.
The knowledge economy and lifelong learning [electronic resource] : a critical reader	Livingstone, D. W.
Pensare l'impossibile [electronic resource] : Dialogo infinito tra arte e scienza	Boi, L. (Luciano), 1957-
Art, literature, and passions of the skies [electronic resource]	Tymieniecka, Anna-Teresa.
Handbook of survey methodology for the social sciences [electronic resource]	Gideon, Lior.
Passion, death, and spirituality [electronic resource] : the philosophy of Robert C. ...	Higgins, Kathleen Marie.
Art's way out [electronic resource] : exit pedagogy and the cultural condition	Baldacchino, John.
Life, subjectivity & art [electronic resource] : essays in honor of Rudolf Bernet	Breeur, Roland.
Critical communities and aesthetic practices [electronic resource] : dialogues with ...	Halsall, Francis.
Work and education in America [electronic resource] : the art of integration	Barabasch, Antje.
Philosophical dimensions of human rights [electronic resource] : some contempora...	Corradetti, Claudio.
The social ecology of resilience [electronic resource] : a handbook of theory and pr...	Ungar, Michael, 1963-
Drunk on capitalism [electronic resource] : an interdisciplinary reflection on market...	Vanderbeeken, Robre...

Search Options dialog box settings:
 Search: [Search] Display Call Number Browse Print
 Publication year: []
 Format: All
 Item type: E-BOOK
 Location: All
 Item category 1: All
 Item category 2: All
 Item category 3: All
 Item category 4: All
 Item category 5: All
 Language: All
 Shadow: BOTH
 Sort by: None

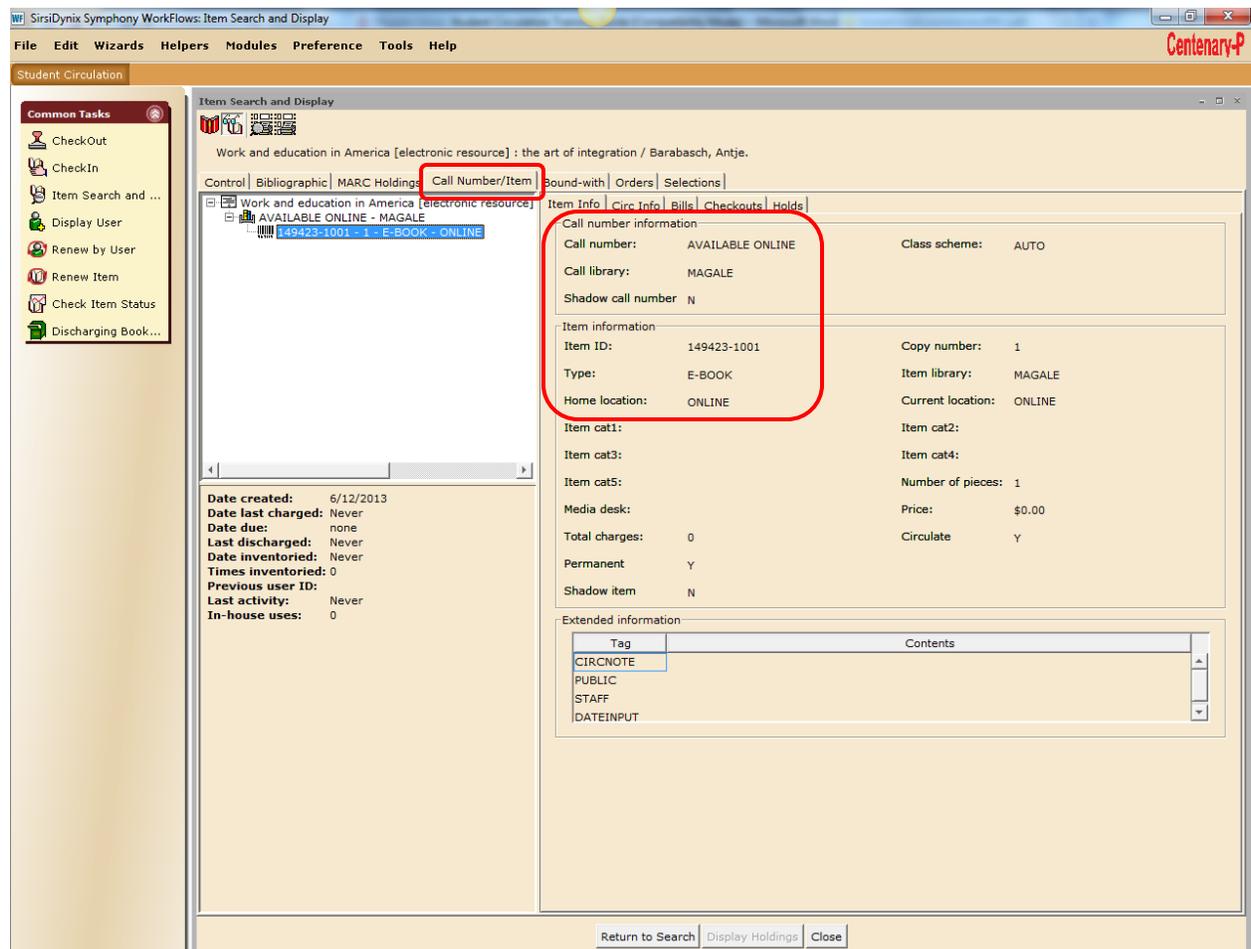
Table with 2 columns: Description, Call Number/Item

Leader	amKa0n
key	ocn822997141
Data source	OCoLC
Date/time stamp	20130108223703.0
Added material codes	m o d
Fixed field data	cr cnu---unuuu
Fixed field data	12122862012 ne ob 001 0 eng d

The *Advanced Search* helper changes the search options at the top of the *Item Search and Display* window. These options allow you to use Boolean operators to refine searching. By refining the previous search [“art” AND “education”], the results are limited to one record.



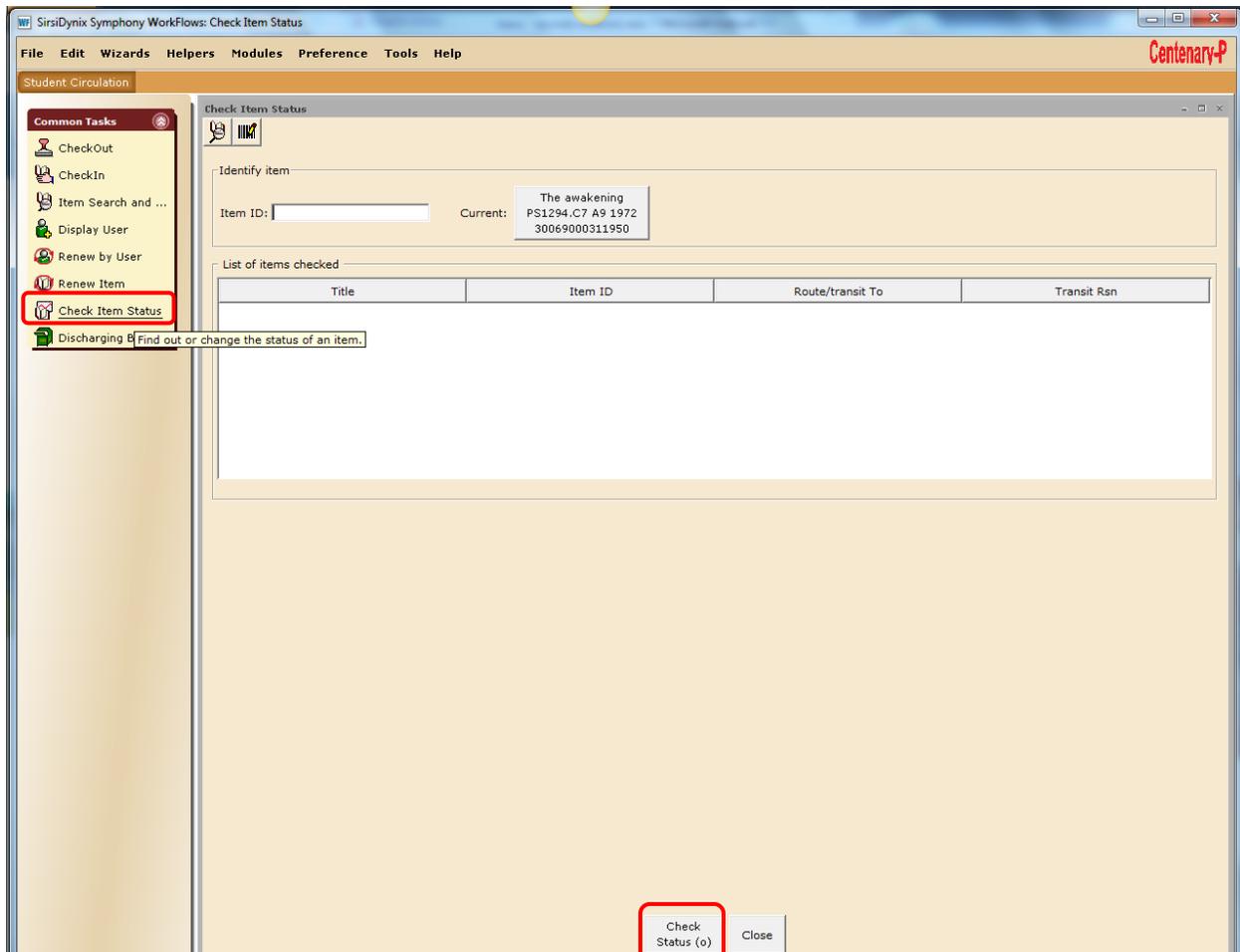
By clicking the *Call Number/Item* tab, you can see item information and verify its location.



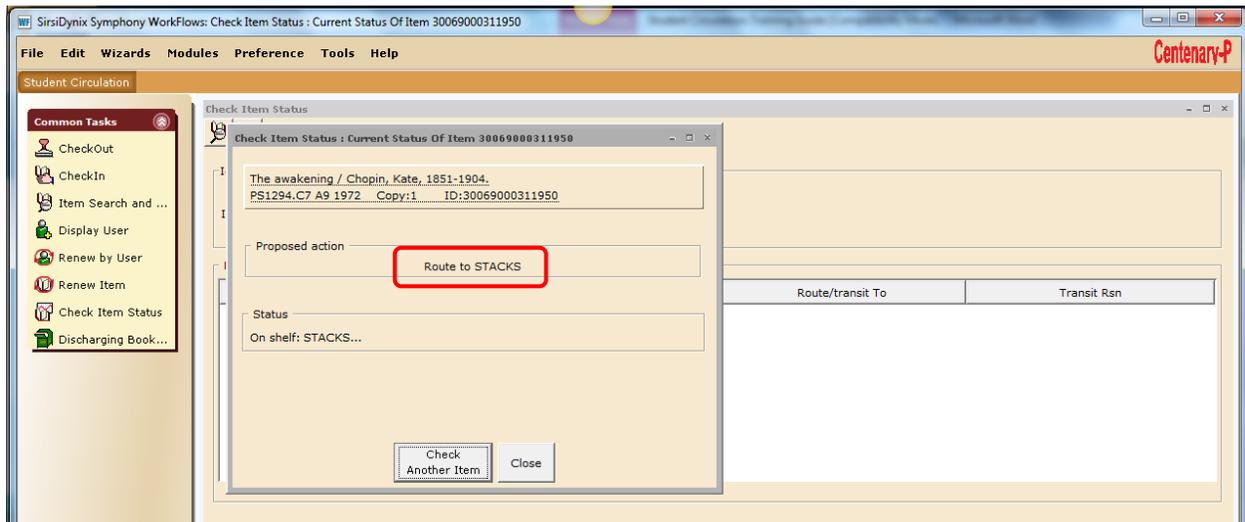
Check Item Status

If you find resources left on tables or in places other than the bookdrops or “to be shelved” bins on the 2nd floor, you should always *Check Item Status*. In order to eliminate the possibility that someone accidentally left an item they checked out on their account:

1. Click the *Check Item Status* wizard and scan the item barcode.
2. Click the *Check Status* button.



3. The message displayed will indicate where to route the item.



4. Click *Close*.

Circulation Tasks

Checking Out Materials

To check out materials:

1. Within the wizard group, 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 by following the steps on pages 5-8 in this training guide.)
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.

SirsiDynix Symphony WorkFlows: CheckOut

File Edit Wizards Helpers Modules Preference Tools Help

Student Circulation

Common Tasks

- Check-Out
- Check-In
- Item Search and ...
- Display User
- Renew by User
- Renew Item
- Check Item Status
- Discharging Book...

checkOut

Notes

User ID: 000310896 Kohl, Kristi (Mrs.) Profile name: ADMIN...

Identify user

User ID: 000310896

Identify item

Item ID:

List of checkouts

Title	Item ID	Date Due	Billed	Amount Paid Automatically	Type
-------	---------	----------	--------	---------------------------	------

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

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

Renewing Materials

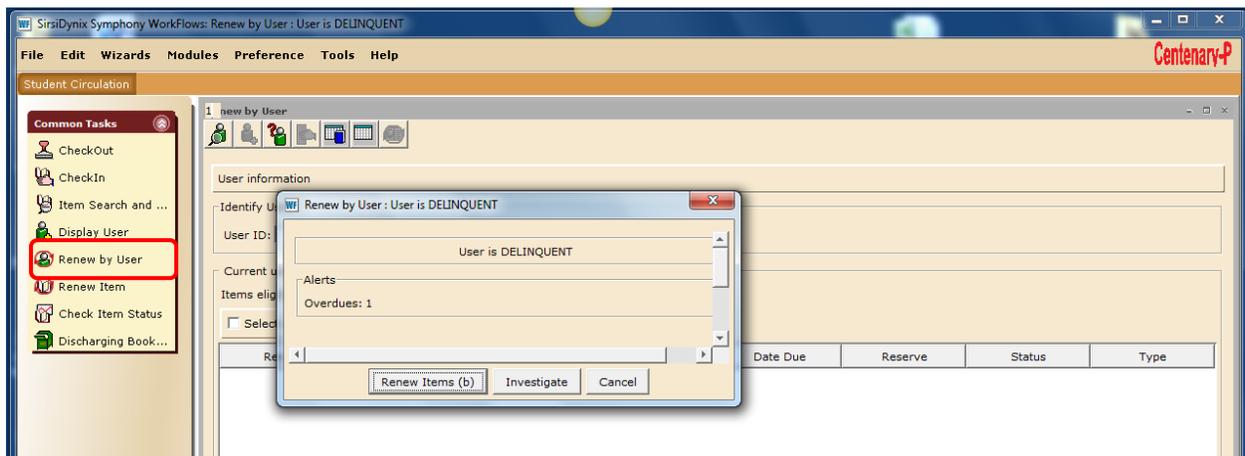
WorkFlows offers two ways to renew items: *Renew User* and *Renew Item*. The system assigns the new due date based on the date of actual renewal, not the original due date. Users can also renew their own materials by logging into e-Library (see the section on **e-Library** for further information).

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 do not have the items physically present.

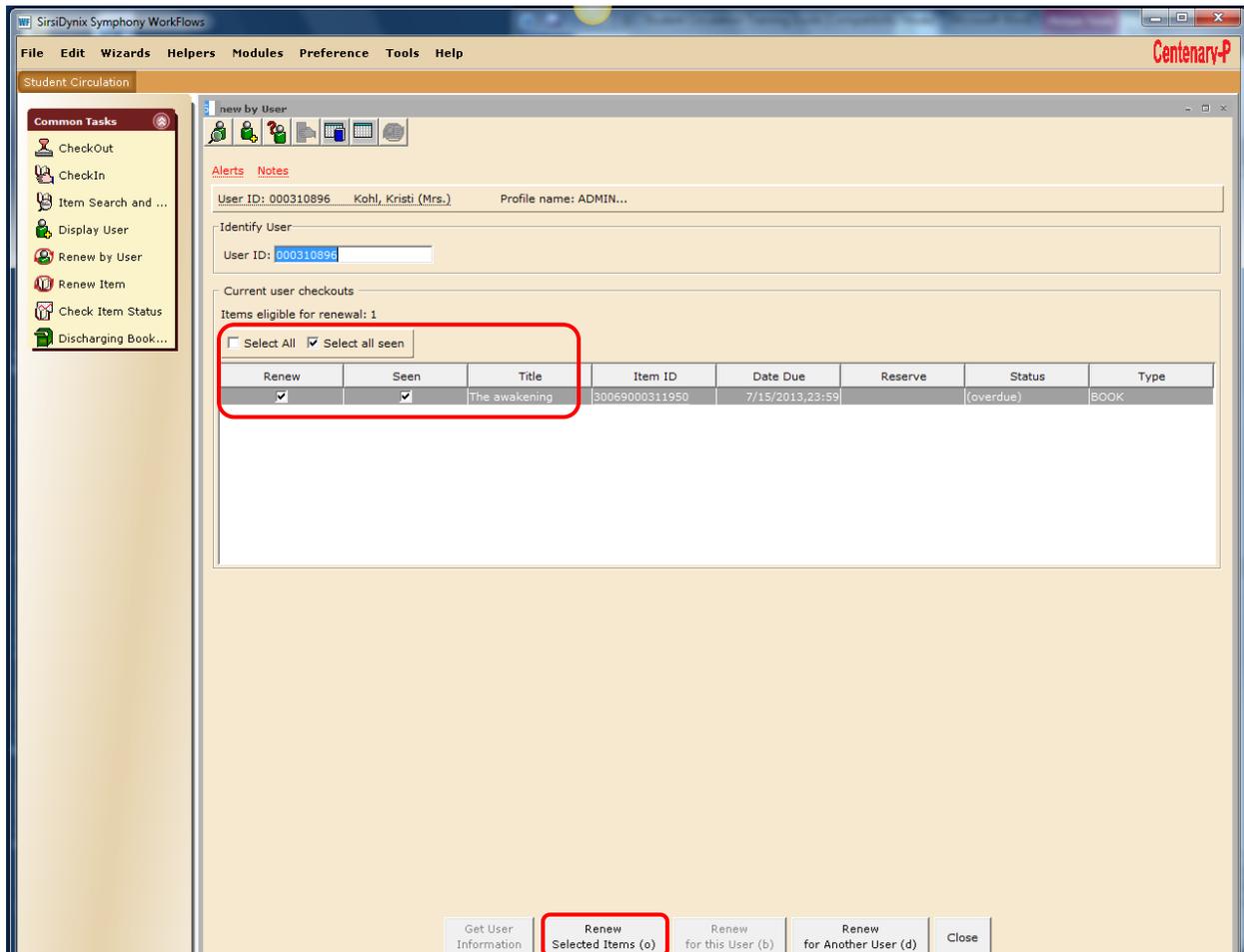
To renew some or all of a user's items:

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



NOTE: An overdue notice will only display for items overdue. Items can still be renewed if the current date is before the due date.

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



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.

4. Click *Renew Selected Items*.

If item(s) cannot be renewed, ask a supervisor or other library staff member to assist; an override may be required 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.

Item(s) Renewed

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

Not renewed

Title	Reserve	Date Due
For one more day		<u>10/21/2010,23:59</u>

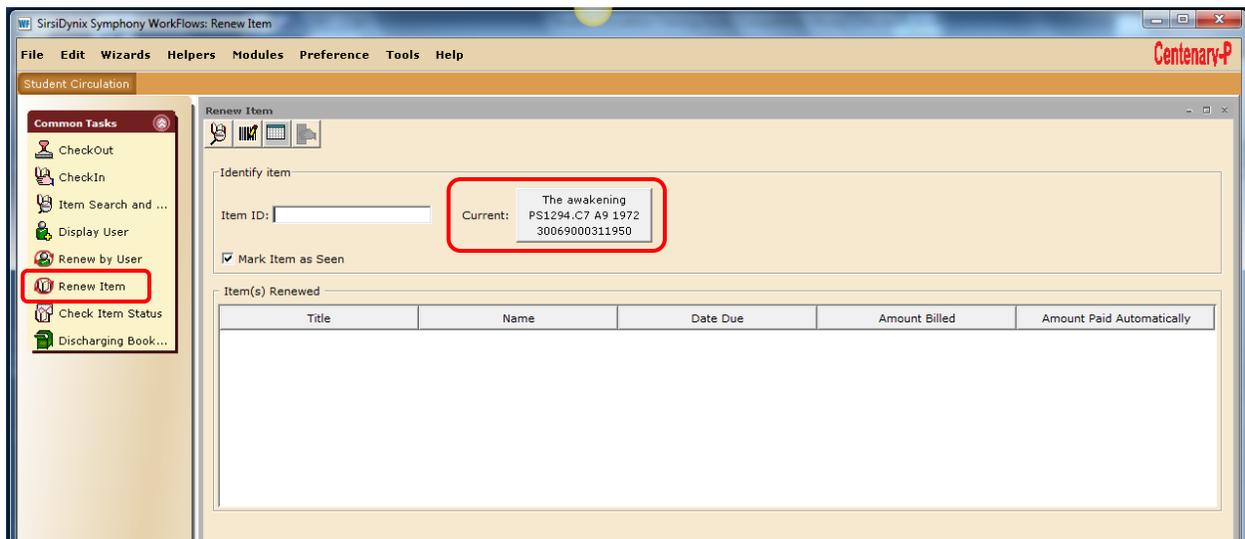
Get User Information Renew Selected Items (o) Renew for this User (b) Renew for Another User (g) Close

5. Click *Close*.

Renew Item Wizard

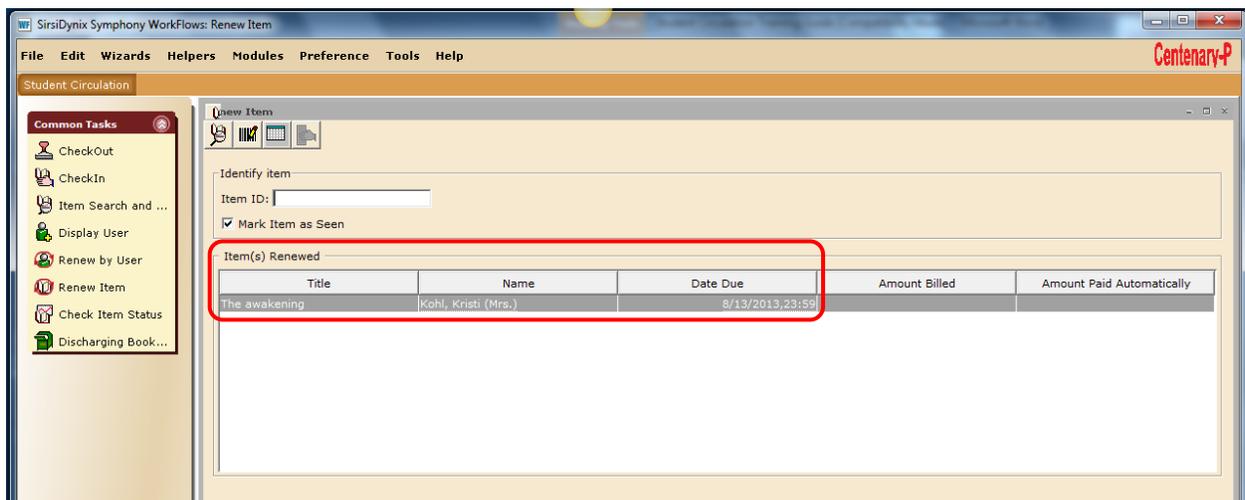
To renew a single checked out item:

1. Within the Common Tasks group of wizards, click the *Renew Item* wizard.
2. If you want the renewal to be recorded as a “seen” renewal (item is physically present for renewal), select the *Mark Item as Seen* check box, if not already selected.



NOTE: The most recent item viewed is displayed.

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



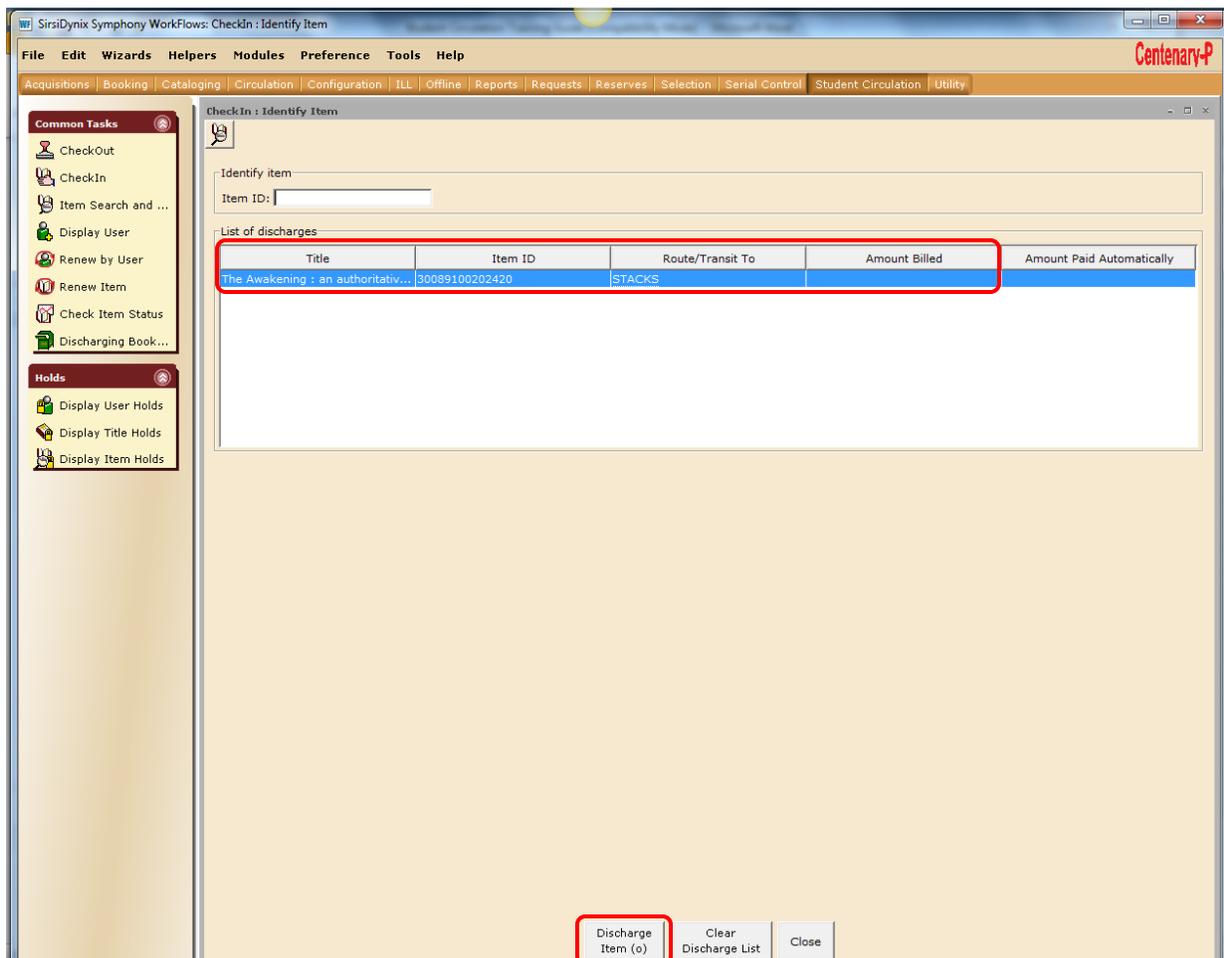
4. Click *Close*.

Checking In Materials

There are two ways to check in items: *Check In* and *Discharging Bookdrop*.

Check In Wizard

1. Click the *Check In* 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.



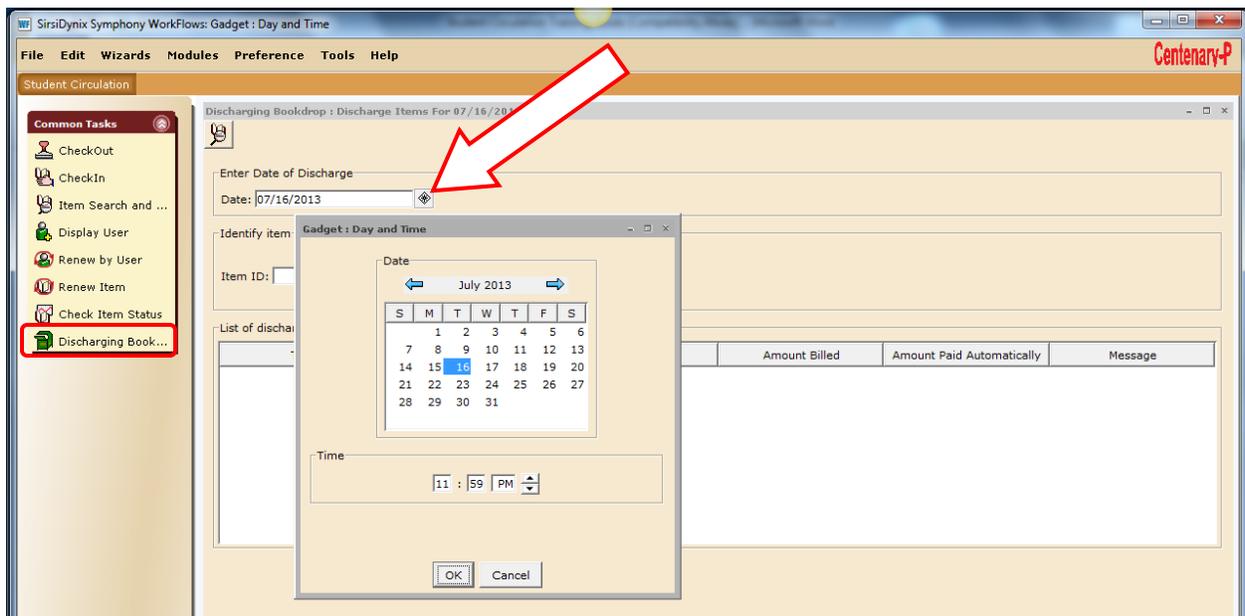
4. Click *Close*.

Discharging BookDrop Wizard

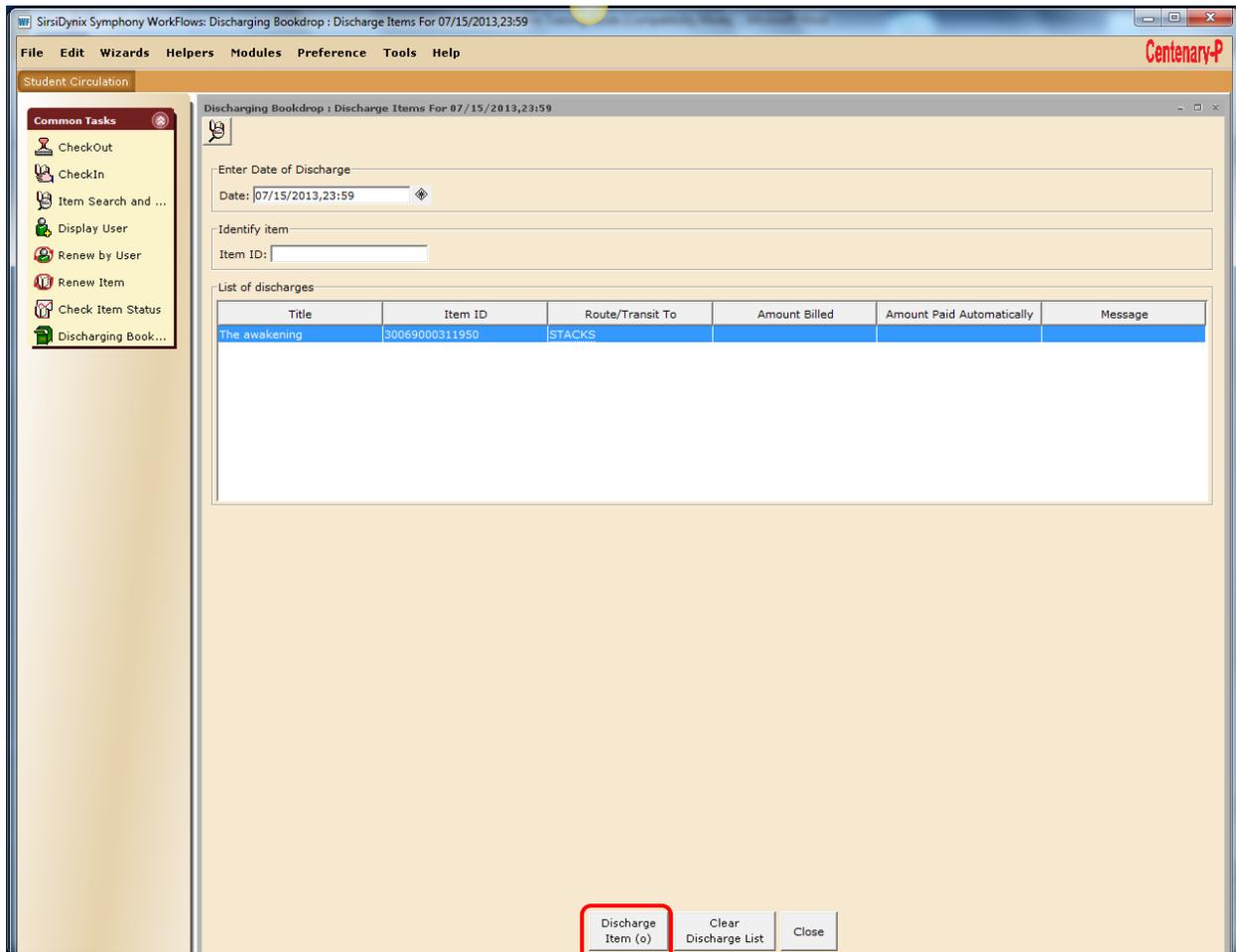
Use the *Discharging Bookdrop* wizard to check in items left in the book drop and backdate the discharge (check in) date. This is helpful when users return items after hours. It also can be used when the library closes for unexpected reasons and due dates were assigned on the days it was closed.

To backdate items when checking in:

1. Click the *Discharging Bookdrop* wizard.
2. Click the date gadget to select an appropriate date and time. Click *OK*.

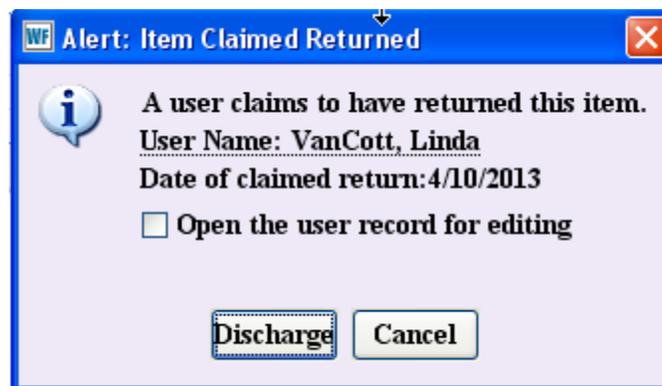


3. Scan the item barcode or type the item ID and click *Discharge Item*.



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

NOTE: If a *claimed returned* message displays, inform your supervisor or other library staff member.



5. Click *Close*.

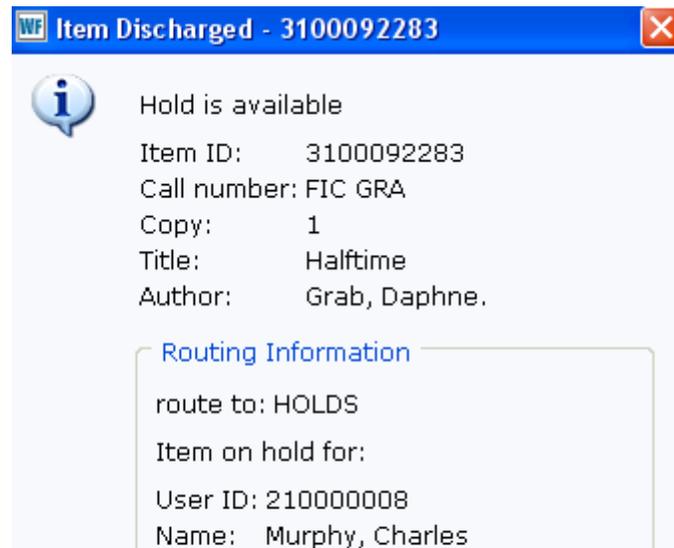
Viewing and Placing Items in Transit

On occasion, you may receive an item that is in transit to a location other than its regular home location (e.g. Stacks, Hurley). At the time of check in, in-transit items will prompt you to:

- 1) Send the item back to the owning library to be re-shelved,
- 2) Print a hold slip in order to fulfill a hold request, or
- 3) Place the item on the Reserve shelf at Circulation.

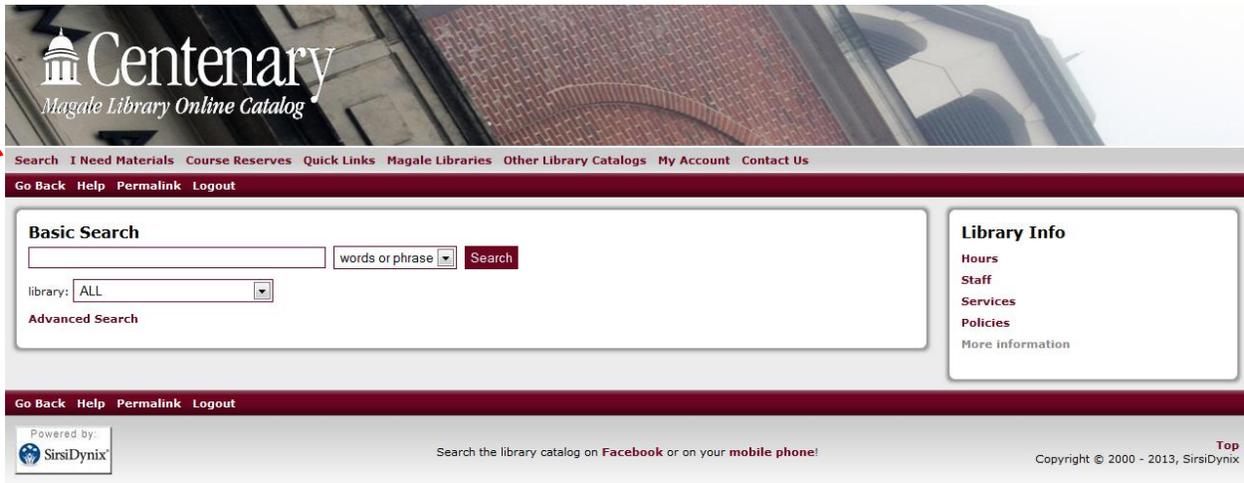
To receive an in transit item, you check it in just as you would any other item:

1. Click the *Check In* wizard.
2. Scan the item or type in the item ID and click *Discharge Item*.
3. For any item prompting you to send it to another library, fulfill a hold request, or place it on the Reserve shelf, inform your supervisor or another library staff member. The screen prompt at check in will state something like this: **Click Put Item in Transit to send to a different location. Click OK to make the hold available.**



e-Library

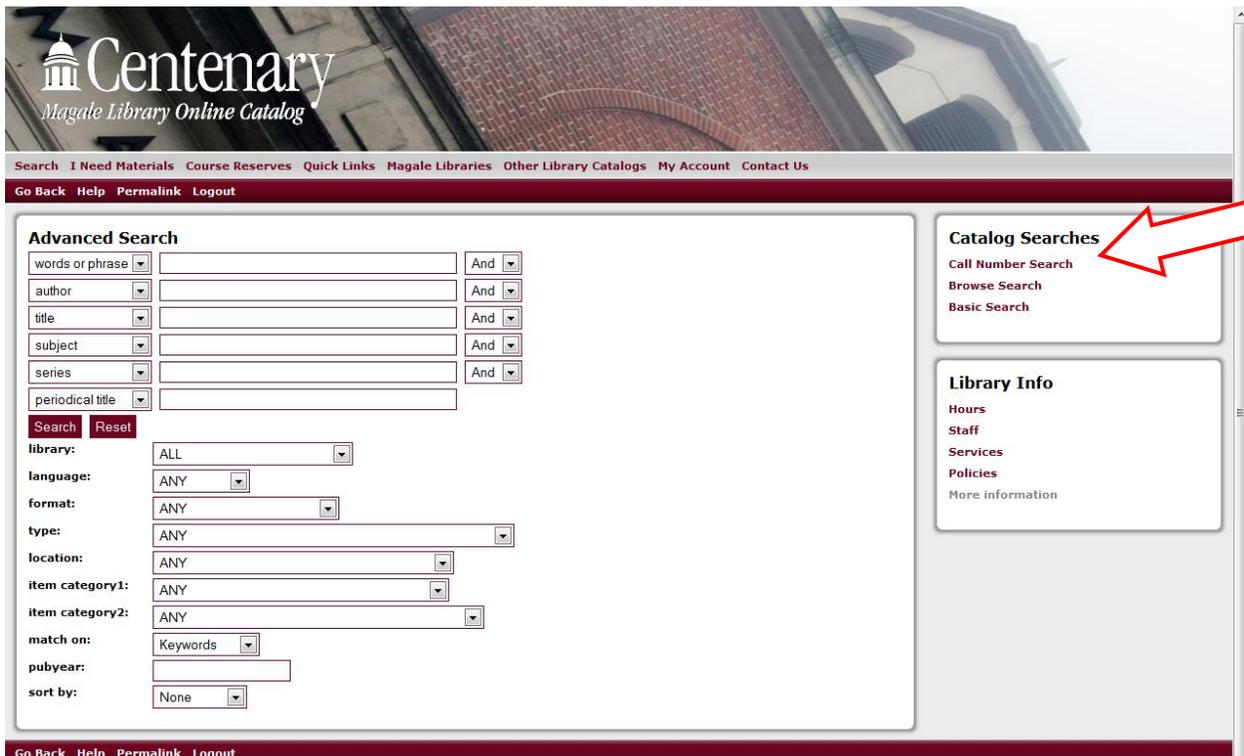
e-Library is the patron interface, or discovery portal, for SirsiDynix. *e-Library* makes it easy for users to connect with Magale Library's print and electronic resources and maintain their personal accounts online.



The screenshot shows the homepage of the Centenary Magale Library Online Catalog. The header features the library's name and logo. Below the header is a navigation bar with links: Search, I Need Materials, Course Reserves, Quick Links, Magale Libraries, Other Library Catalogs, My Account, and Contact Us. A secondary navigation bar includes Go Back, Help, Permalink, and Logout. The main content area is divided into two sections: Basic Search and Library Info. The Basic Search section contains a search input field with a dropdown menu set to 'words or phrase', a Search button, and a library selection dropdown set to 'ALL'. Below this is a link to Advanced Search. The Library Info section lists links for Hours, Staff, Services, Policies, and More information. At the bottom, there is a footer with the SirsiDynix logo, a link to search on Facebook, a mobile phone link, and a copyright notice for 2000-2013.

Features include:

- **Easy-to-use search options** – *Basic* or *Advanced Search* allows users to search for items by keyword, title, location, item type, publication date, etc. For those familiar with Library of Congress classification, a *Call Number Search* is also an option.



The screenshot shows the Advanced Search page of the Centenary Magale Library Online Catalog. The header and navigation bars are identical to the homepage. The main content area is dominated by the Advanced Search form, which includes multiple search criteria: words or phrase, author, title, subject, series, and periodical title, each with a corresponding input field and an 'And' dropdown. Below these are fields for library, language, format, type, location, item category 1, and item category 2, all with dropdown menus. There are also fields for match on (Keywords), pubyear, and sort by (None). A Search button and a Reset button are located below the search criteria. To the right of the search form is a sidebar with two sections: Catalog Searches and Library Info. The Catalog Searches section lists links for Call Number Search, Browse Search, and Basic Search. A red arrow points to the Call Number Search link. The Library Info section lists links for Hours, Staff, Services, Policies, and More information. At the bottom, there is a footer with the same navigation links as the homepage.

- **I Need Materials** - Allows users to access subscription databases, submit an interlibrary loan request or contact a librarian directly.

Centenary
Magale Library Online Catalog

Search | **I Need Materials** | Course Reserves | Quick Links | Magale Libraries | Other Library Catalogs | My Account | Contact Us

Go Back | Help | Permalink | Logout

I Need Materials

[Ask a Librarian](#) [Catalog Search](#) [Interlibrary Loan](#)
[Online Research](#) [Course Reserves](#)

Library Info

[Hours](#)
[Staff](#)
[Services](#)
[Policies](#)
[More information](#)

- **Course Reserves** – Allows users to look up course reserves by instructor name, course number or course name.

Centenary
Magale Library Online Catalog

Search | **Course Reserves** | I Need Materials | Quick Links | Magale Libraries | Other Library Catalogs | My Account | Contact Us

Go Back | Help | Logout

Lookup Items on Reserve

Search for:

[Lookup Items on Reserve by Instructor](#)
[Lookup Items on Reserve by Course Number](#)
[Lookup Items on Reserve by Course Name](#)

desk:

Library Info

[Hours](#)
[Staff](#)
[Services](#)
[Policies](#)
[More information](#)

Reserve Search Results

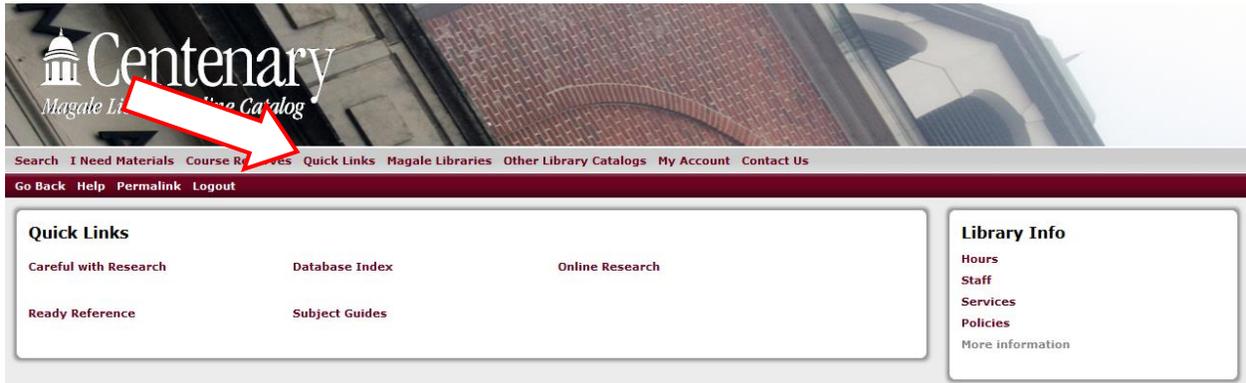
7 Courses for Nicoletti, Lisa (Dr.)

1. **Renaissance to Contemporary Art**
ART 102
2. **Design History**
ART 250
3. **Interdisciplinary Studies: Art and English**
ART 290
4. **Representation of the Holocaust**
ART 291
5. **Foundations of Modern Art**
ART 306
6. **History of Photography**
ART 310
7. **Seminar in Rhetoric and Culture**
ENGL 101

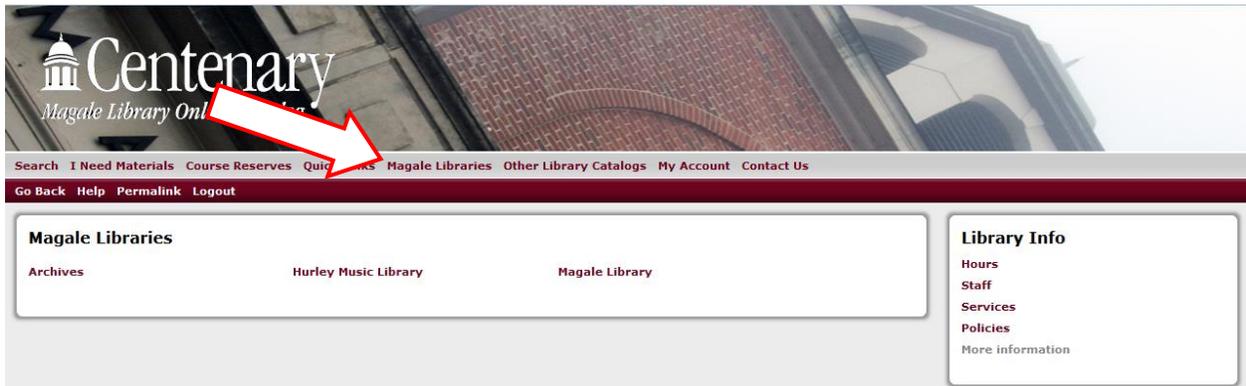
Library Info

[Hours](#)
[Staff](#)
[Services](#)
[Policies](#)
[More information](#)

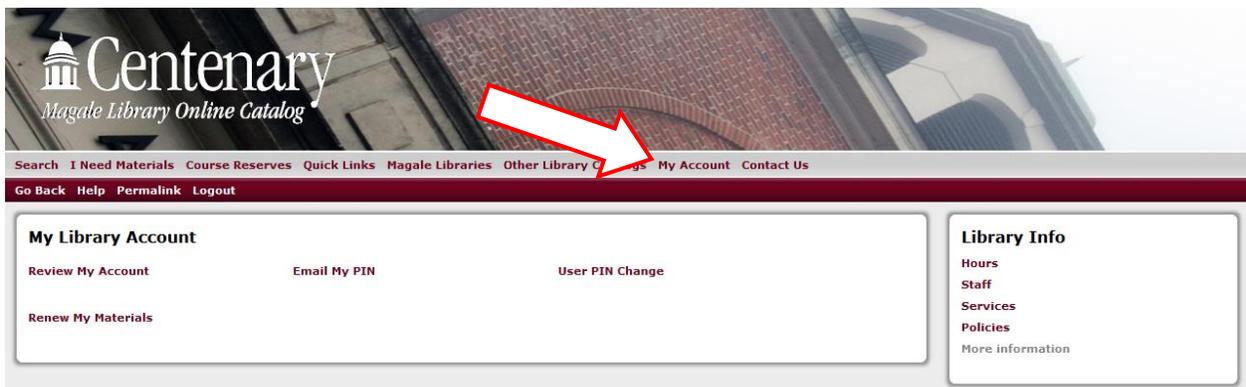
- **Quick Links** – Convenient access to the list of subscription databases, e-journals, subject guides, and helpful resources about writing a research paper and maintaining academic integrity.



- **Magale Libraries** – Links users to the main webpages for the Archives, Hurley and Magale.



- **My Account** provides users online access to view their accounts, renew items and change PINs.



- **Contact Us** and **Library Info** – Offers users direct links to Magale’s staff listing, hours, policies, art exhibitions and the library’s newsletter.

