

# SIRSIDynix WorkFlows & e-Library Training Guide

Circulation

Magale Library Student Worker

July 2013

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#### 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:

| SirsiDynix Symphony WorkFlows                           |          |           |             |
|---|----------|-----------|-------------|
| <u>Eile Edit Wizards Modules Preference Tools H</u> elp | Menu Bar |           | Centenary-P |
| Student Circulation Module Toolbar                      |          |           |             |
| Common Tasks  |          |           |             |
| CheckOut  |          |           |             |
| P CheckIn   |          |           |             |
| B Item Search and                                       |          |           |             |
| Bisplay User Wizard Group                               |          |           |             |
| Renew by User   |          |           |             |
| W Renew Item  |          |           |             |
| Check Item Status                                       |          |           |             |
| Discharging Book  |          |           |             |
|   |          |           |             |
|   |          | Workspace |             |
|   |          | Workspace |             |
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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.

| W SirsiDynix Symphony WorkFlow                          | ws: CheckIn : Identify Item  | A STATE OF THE                 | And Andrew Street       | Like Company, Man Street |                           |
|---|--|--------------------------------|-------------------------|--------------------------|---------------------------|
| <u>F</u> ile <u>E</u> dit <u>W</u> izards He <u>l</u> p | pers <u>M</u> odules <u>P</u> reference <u>T</u> ools <u>H</u> elp |                                |                         |                          | Centenary-P               |
| Student Circulation                                     |  |                                |                         |                          |                           |
| Common Tasks 🛞  | CheckIn : Ide fy Item  |                                |                         |                          | - 🗆 ×                     |
| 🚨 CheckOut  | Перег  |                                |                         |                          |                           |
| CheckIn   | Identify item  |                                |                         |                          |                           |
| Item Search and   |  |                                |                         |                          |                           |
| Display User     Renew by Liser                         | Wizards  | Item ID                        | Route/Transit To        | Amount Billed            | Amount Paid Automatically |
| Renew Item  |  |                                |                         |                          |                           |
| Check Item Status                                       |  |                                |                         |                          |                           |
| Discharging Book  |  |                                |                         |                          |                           |
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|   |  | Discharge<br>Item ( <u>o</u> ) | Clear<br>Discharge List |                          |                           |

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.

| 🔄 SirsiDynix Symphony WorkFlows: Display User   |             |
|---|-------------|
| <u>F</u> ile <u>E</u> dit <u>W</u> izards Helpers <u>M</u> odules <u>P</u> reference <u>T</u> ools <u>H</u> elp | Centenary-P |
| Student Circulation   |             |
| Common Tasks 🛞 Display User   | - 🗆 ×       |
| CheckOut  |             |
| CheckIn User information  |             |
| B Item Search and   |             |
| bisplay User ID: Current: Kohl, Kristi (Mrs.)   |             |
| B Renew by User   |             |
| 🔞 Renew Item  |             |
| Check Item Status Summary Addresses Extended Info Bills Checkouts Holds Routings Bookings Suspension            |             |
| Discharging Book  |             |
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|   |             |
| Display Display<br>this User (o) Another User Close   |             |

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.

| SirsiDynix Symphony WorkFl   | lows: Display User                                      | Carlos Contrato   | South States of States of States |             |
|--|---|---|----------------------------------|-------------|
| <u>F</u> ile <u>E</u> dit <u>W</u> izards He   | pers Modules Preference Tools He                        | Ip  |                                  | Centenary-P |
| Student Circulation  |   |   |                                  |             |
| Common Tasks<br>CheckOut<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckItem Status<br>Check Item Status<br>CheckItem Status<br>CheckItem Status<br>CheckItem Status | Addresses     Extended Info     Fimary: 1     Addresses | Profile name: ADMIN<br>Is  Checkouts  Holds  Routings  Bookings  Susj | rension                          | - 0 ×       |
|  | POBOX<br>Magale Library                                 | Line1<br>Room 104   | Email<br>kkohl@centenary.edu     |             |
|  |   |   |                                  |             |

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:

| W SirsiDynix Symphony WorkFlow                         | ws: Display User : User Search                         | - 0 <b>X</b> |
|--|--|--------------|
| <u>F</u> ile <u>E</u> dit <u>W</u> izards <u>M</u> odu | ules <u>P</u> reference <u>T</u> ools <u>H</u> elp     | Centenary-P  |
| Student Circulation                                    |  |              |
| Common Tasks 🛞   | Dieplay User   | - 🗆 ×        |
| L CheckOut   |  |              |
| CheckIn  | User information                                       |              |
| Item Search and  |  |              |
| Repew by User  | User IC Search for: Search                             |              |
| Renew Item   | Index: Name AND OR Type:                               |              |
| Check Item Status                                      | Library: ALL_LIBS  Summar Kohl, Kristi (Mrs.) C Browse |              |
| Discharging Book                                       | Current: 000310896                                     |              |
|  | List of users  |              |
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|  |  |              |
|  | Display<br>this User (o) Another User Slose            |              |

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.

| W SirsiDynix Symphony WorkFlows: Display User : User Search                                     |  |
|---|--|
| <u>File E</u> dit <u>W</u> izards <u>M</u> odules <u>P</u> reference <u>T</u> ools <u>H</u> elp | Centenary-P  |
| Student Circulation   |  |
| Common Tasks  | - 🗆 ×  |
| CheckOut  |  |
| User information  |  |
| B Item Search and Identify Display User : User Search   | - D ×  |
| Search for:   |  |
| Renew by User Name: CHRIS   |  |
| Renew Item Search for:  | Search   |
| Check Item Status Summar Index: Name AND  | OR Type:   |
| Discharging Book Library: ALL_LIBS  | C Browse   |
| Current: 000310896  |  |
| List of users   |  |
| Name User   | ID Alt ID Phone  |
| Parker, Chris (Mr) CHRISPARKER  | CHRISPARKER  |
| Martin, Chris (Dr.) 408191604   |  |
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|   | Display  |
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|   |  |
|   | Display<br>this User (o)         Display<br>Another User         Close |
|   | NT 10:09 AM  |

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*.

| W SirsiDynix Symphony WorkFlows: ( | CheckOut : User Search                             |                        |
|------------------------------------|--|------------------------|
| File Edit Wizards Helpers          | s Modules Preference Tools Help                    | Centenary-P            |
| Student Circulation                |  |                        |
|                                    | heckOut  | - 🗆 ×                  |
| Common Tasks                       | CheckOut : User Search – 🗆 ×                       |                        |
| CheckOut                           |  |                        |
| Checkin<br>04) them Search and     |  |                        |
| Display User                       | Search for: Search                                 |                        |
| Repew by User                      | Index: Name AND OR Type:                           |                        |
| Benew Item                         | Library: ALL_LIBS     V     Kelyword     C Reyword |                        |
| Check Item Status                  | Current: 000310896                                 |                        |
| Discharging Book                   | List of users                                      |                        |
|                                    | Name User ID Alt ID Phone                          | aid Automatically Type |
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|                                    | Get liser Check Out Item Check Out                 |                        |
|                                    | Information To User To New User 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.

| WF SirsiDynix Symphony WorkFlow   | ws: Billing a User : Glossary   | - C X       |
|---|---|-------------|
| File Edit Wizards Modu  | ules Preference Tools Help  | Centenary-P |
| Acquisitions   Booking   Catalo   | ging Circulation Configuration   ILL   Offline   Reports   Requests   Reserves   Selection   Serial Control   Student Circulation   Utility |             |
| Common Tasks 🛞  | Jing a liter<br>Aleris Notes  | - • ×       |
| User Registration   | User ID: UUUSIUS96 Koni, Kristi (Mrs.) Profile name: ADMIN  |             |
| Renew by User   | User 1D: 000310896  |             |
| Renew Item  | Enter Item & Bill Information   |             |
| 👔 Billing a User  | Reason for bill:  |             |
| Paying Bills  | Amount:   |             |
| Item Search and   | Payment type: CASH  |             |
| Help  | List of Bills   |             |
| 🖨 Print   | Title Billed Bill Status  |             |
| Users (8)<br>Items (8)<br>Holds (8)<br>Special (8)<br>In-Transit Hems (8) | User is DELINQUENT<br>Estimated amount owed in biller/fines: \$50.00 Billed   |             |
|   |   |             |
|   | Get User<br>Information Bill User Pay Now (d) Another User (g) Close  |             |

**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:

| Wel SireiDurg                | lows: Item Search and Display            | to the Art of the State and the State and the State of th | _ 0 <mark>_ X</mark>        |
|------------------------------|--|--|-----------------------------|
| File Edit W                  | elpers Modules Preference Tools Help     |  | Centenary-P                 |
| Student Circulation          |  |  | o ontoiner y r              |
| Comment Tarles               | m Search and Display                     |  | - 🗆 ×                       |
| Common Tasks                 |  |  |                             |
| CheckIn                      | Configure options for the Item Search.   | <u>z</u><br>   | Search                      |
| 🖉 Item Search and            | Library: ALL                             | <u> </u>   | <ul> <li>Keyword</li> </ul> |
| 🔒 Display User               | Current: The awakening PS1294.C7 A9 197  | 2 ID:30069000311950  | C Browse<br>C Exact         |
| Renew by User                |  |  |                             |
| Renew Item                   |  |  |                             |
| Check Item Status            |  |  |                             |
| Discharging Book             |  |  |                             |
|                              |  |  |                             |
|                              |  |  |                             |
| W SirsiDynix Symphony WorkFl | ws: Item Search and Display              |  |                             |
| File Edit Wizards Hel        | pers Modules Preference Tools Help       |  | Centenary-P                 |
| Student Circulation          |  |  |                             |
| Common Tasks                 | m Search and Display                     |  | - = ×                       |
| CheckOut                     | # # M™™ + →                              | Search Options   |                             |
| CheckIn                      | Search for:                              | Search Display Call Number Browse Print  | Search                      |
| 😫 Item Search and            | Library: ALL                             | Format: All  | Keyword                     |
| 🔒 Display User               | Current: The awakening PS1294.C7 A9 1972 | Item type:   | C Browse<br>C Exact         |
| Benew by User                |  | Location:  |                             |
| 🔟 Renew Item                 |  | Item category 1: All   |                             |
| Check Item Status            |  | Item category 2: All   |                             |
| Discharging Book             |  | Item category 3: All   |                             |
|                              |  | Item category 5: All   |                             |
|                              |  | Language:  |                             |
|                              |  | Shadow: BOTH   |                             |
|                              |  | Sort by: None  |                             |
|                              |  |  |                             |
|                              |  | OK Cancel  |                             |
|                              |  |  |                             |
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- 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.

| WF SirsiDynix Symphony WorkFlor | xws: Item Search and Display   |  |
|---------------------------------|--|--|
| File Edit Wizards Help          | pers Modules Preference Tools Help   | Centenary-P  |
| Student Circulation             |  |  |
| Student Circulation             | Search Oppios         Search for:         Index:       Oneral         Dray:       ALL         Current:       The awakening   | Search         Type:         © Keyword         © Browse         © Exact         2012         2013         2014 |
|                                 | 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 cnuunuuu       Fixed field data     1212282012 ne ob 001 0 eng d | ×  |
|                                 | Detailed Display Close   | <u> </u>   |

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.

| WF SirsiDyni | ix Symphony Work | lows: Item Search and Display   |             |
|--------------|------------------|---|-------------|
| $\square$    | it Wizards Ho    | Ipers Modules Preference Tools Help   | Centenary-P |
| Stude.       |                  | $\wedge$  |             |
|              |                  | un Search and Display   | - E ×       |
| Common       | n Tasks 🛛 👿      |   |             |
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|              | SCKOUL           | General: art AND Title: jeducation  | Search      |
| P Che        | eckIn            |   |             |
| UA Iter      | n Search and     | Library: Pres   | Reset       |
| E Iten       | in Search and    | Current: Barabasch, Antje Work and education in America [electronic res AVAILABLE ONLINE ID:149423-1001 Ctrl#:0757828653 Copy:1   |             |
| 👸 Disp       | play User        | KERNER Grand at All 12 month  |             |
|              | ow by Hear       | KEYWORD General art, ALL: 13 records  |             |
| Keil         | lew by user      | Author Author   | Pub. Year   |
| 🚺 Ren        | new Item         | Supervising practices for postgraduate research in art, architecture and design [ele Allpress, Brent.   | 2012        |
|              |                  | The knowledge economy and lifelong learning [electronic resource] : a critical reader Livingstone, D. W.  | 2012        |
| Che Che      | eck Item Status  | Pensare l'impossibile [electronic resource] : Dialogo infinito tra arte e scienza Boi, L. (Luciano), 1957-  | 2012        |
|              | charging Book    | Art, literature, and passions of the skies [electronic resource] Iymieniecka, Anna-Teresa.  | 2012        |
|              | charging book    | Panabook or survey methodology for the social sciences [electronic resource] Glaeon, Lior.  | 2012        |
|              |                  | Addition was estimated in a spintality (rectronic resource) : the primosophy of Robert C Riggins, Kathleen Marie.   | 2012        |
|              |                  | Arts way out electronic resource) : exit pedagogy and the cutation conductor biological | 2012        |
|              |                  | Critical communities and aesthetic practices [electronic resource] : dialogues with Halsall. Francis.   | 2012        |
|              |                  | Work and education in America [electronic resource] : the art of integration Barabasch, Antie.  | 2012        |
|              |                  | Philosophical dimensions of human rights [electronic resource] : some contempora Corradetti, Claudio.   | 2012        |
|              |                  | The social ecology of resilience [electronic resource] : a handbook of theory and pr Ungar, Michael, 1963-  | 2012        |
|              |                  | Drunk on capitalism [electronic resource] : an interdisciplinary reflection on market Vanderbeeken, Robrecht.   | 2012        |
|              |                  |   |             |
|              |                  |   |             |

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 2<sup>nd</sup> 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.

| WF SirsiDynix Symphony WorkFlo | ows: Check Item Status             |   |                  |             |
|--------------------------------|------------------------------------|---|------------------|-------------|
| File Edit Wizards Hel          | pers Modules Preference Tools Help | •   |                  | Centenary-P |
| Student Circulation            |                                    |   |                  |             |
| Common Tasks 🛞                 | Check Item Status                  |   |                  | - 🗆 ×       |
| 🚨 CheckOut                     |                                    |   |                  |             |
| 🕒 CheckIn                      | Identify item                      |   |                  |             |
| 🖉 Item Search and              | Item ID:                           | The awakening<br>Current: PS1294.C7 A9 1972 |                  |             |
| 🔓 Display User                 |                                    | 30069000311950                              |                  |             |
| 🛞 Renew by User                | List of items checked              |   |                  |             |
| Renew Item                     | Title                              | Item ID                                     | Route/transit To | Transit Rsn |
| Check Item Status              |                                    |   |                  |             |
| Discharging B Find out o       | or change the status of an item.   |   |                  |             |
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|                                |                                    |   |                  |             |
|                                |                                    | Check<br>Status (o)                         | Close            |             |

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

| File Edit Wizards Modules Preference Tools Help       Centenzy-P         Student Circulation       Image: Status of Item 30009000311950       Image: Status of Item 30009000311950         Common Tasks       Image: Status of Item 30009000311950       Image: Status of Item 30009000311950         Check Item Status       Image: Status of Item 30009000311950       Image: Status of Item 30009000311950         Image: Status       Image: Status of Item 30009000311950       Image: Status of Item 30009000311950         Image: Status       Image: Status of Item 30009000311950       Image: Status of Item 30009000311950         Image: Status of Item 300090000311950       Image: Status of Item 300090000311950       Image: Status of Item 300090000311950         Image: Status of Item 300090000311950       Image: Status of Item 300090000311950       Image: Status of Item 300090000311950         Image: Status of Item 300090000000       Image: Status of Item 300090000311950       Image: Status of Item 30009000000000000000000000000000000000   | WF SirsiDynix Symphony WorkFlo   | Hows: Check Item Status : Current Status Of Item 30069000311950  |             |
|---|--|--|-------------|
| Student Circulation         Common Tasks         Common Tasks       Image: Circulation         Check Ion       Image: Circulation         Check In       Image: Circulation         Check In       Image: Circulation         Check In       Image: Circulation         Image: Circulation       Image: Circulation         Image: Check In       Image: Circulation         Image: Circulation       Image: Circulation         Image: Check In       Image: Circulation         Image: Circulation       Route to STACKS         Image: Check Item Status       Image: Circulation         Image: Check Item Status       Image: Circ | File Edit Wizards Mod  | odules Preference Tools Help   | Centenary-P |
| Close Close   | File     Edit     Wizards     Mod       Student Circulation     Incomparing     Incomparing       Image: CheckOut     Image: CheckIn     Image: CheckIn       Image: CheckIn     Image: CheckIn     Ima | check Item Status         Check Item Status : Current Status Of Item 30050000311950         The awakening / Chopin, Kate, 1851-1904.         PS1294.C7 A9 1972         Copy:1         ID:30069000311950         Proposed action         Route to STACKS         Status         On sheff: STACKS         Check         Check         Another Item | Centenary-P |

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.

| W SirsiDynix Symphony WorkFlow   | vs: CheckOut  | Circuit Circui | a hand in              | the long to the party | and the Real Property lies, which the |             |
|--|---|--|------------------------|-----------------------|---------------------------------------|-------------|
| File Edit Wizards Help   | ers Modules Preference  | Tools Help   |                        |                       |                                       | Centenary-P |
| Student Circulation  |   |  |                        |                       |                                       |             |
| Common Tasks (a)<br>CheckOut<br>CheckIn<br>Display User<br>Chiplay User<br>Particular<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckIn<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckIn<br>CheckOut<br>CheckOut<br>CheckIn<br>CheckOut<br>CheckIn<br>CheckOut<br>CheckOut<br>CheckIn<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckIn<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>CheckOut<br>Ch | CheckOut<br>Notes<br>User ID: 000310896 Kohl,<br>Identify user<br>User ID: [000310896 | <u>Kristi (Mrs.)</u> Profile na  | ime: ADMIN             |                       |                                       | - 0 ×       |
| 🔞 Renew Item   | Identify item   |  |                        |                       |                                       |             |
| Discharging Book   | litem ID: ]   |  |                        |                       |                                       |             |
|  | Title   | Item ID  | Date Due               | Billed                | Amount Paid Automatically             | Туре        |
|  |   |  | Get User Check Out Its | am Check Out or       |                                       |             |

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.

| W SirsiDynix Symphony WorkFlows                      | 0.0                           | 🗸 y kana ing                  | the Surgers (                | rund to a little            |           |             |
|--|-------------------------------|-------------------------------|------------------------------|-----------------------------|-----------|-------------|
| File Edit Wizards Helpers Modules Preference Tools I | telp                          |                               |                              |                             |           | Centenary-P |
| Student Circulation                                  |                               |                               |                              |                             |           |             |
| i new by User  |                               |                               |                              |                             |           | - 🗆 ×       |
|  |                               |                               |                              |                             |           |             |
| Alerts Notes   |                               |                               |                              |                             |           |             |
| User ID: 000310896 Kohl, Kristi (Mr.                 | s.) Profile name: /           | ADMIN                         |                              |                             |           |             |
| B Display User                                       |                               |                               |                              |                             |           |             |
| Renew by User User ID: 000310896                     |                               |                               |                              |                             |           |             |
| Renew Item   |                               |                               |                              |                             |           |             |
| Check Item Status Items eligible for renewal: 1      |                               |                               |                              |                             |           |             |
| Discharging Book                                     |                               |                               |                              |                             |           |             |
| Benew Seen   | Title                         | Item ID                       | Date Due                     | Reserve                     | Status    | Type        |
|  | The awakening                 | 30069000311950                | 7/15/2013,23:59              |                             | (overdue) | воок        |
|  |                               |                               |                              |                             |           |             |
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|  | Get User<br>Information Selec | Renew<br>ted Items (o) for th | Renew<br>his User (b) for An | Renew<br>other User (d) Clo | ose       |             |

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 Rener<br>Information Selected Ite | W Renew<br>for this User ( <u>b</u> ) fo | Renew<br>or Another User (g) |

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.

| WF SirsiDynix Symphony WorkFlows:  | Renew Item                  |  |                  |               |                           |
|--|-----------------------------|--|------------------|---------------|---------------------------|
| File Edit Wizards Helper   | rs Modules Preference Tools | Help   |                  |               | Centenary-P               |
| Student Circulation  |                             |  |                  |               |                           |
| Common Tasks (8)<br>CheckOut<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>CheckIn<br>Ch | Renew Item                  | Current: The awakenir<br>Current: 200690003119 | 1g<br>1972<br>50 |               | - 0 x                     |
| Renew Item   | Ttem(s) Renewed             |  |                  |               |                           |
| Check Item Status  | Title                       | Name   | Date Due         | Amount Billed | Amount Paid Automatically |
| Discharging Book   |                             |  | ,                | ,             | <u></u>                   |

**NOTE:** The most recent item viewed is displayed.

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

| WF SirsiDynix Symphony WorkFlows: | : Renew Item                |                     |                 |               |                           |
|-----------------------------------|-----------------------------|---------------------|-----------------|---------------|---------------------------|
| File Edit Wizards Helper          | rs Modules Preference Tools | ; Help              |                 |               | Centenary-P               |
| Student Circulation               |                             |                     |                 |               |                           |
|                                   | (new Item                   |                     |                 |               | - 🗆 ×                     |
| CheckOut                          | 🦉 🛄 🛄 😫                     |                     |                 |               |                           |
| CheckIn                           | Identify item               |                     |                 |               |                           |
| Hitem Search and                  | Item ID:                    |                     |                 |               |                           |
| 💑 Display User                    | ☑ Mark Item as Seen         |                     |                 |               |                           |
| 🛞 Renew by User                   | Item(s) Renewed             |                     |                 |               |                           |
| 🚺 Renew Item                      | Title                       | Name                | Date Due        | Amount Billed | Amount Paid Automatically |
| Check Item Status                 | The awakening               | Kohl, Kristi (Mrs.) | 8/13/2013,23:59 |               |                           |
| Discharging Book                  |                             |                     |                 |               |                           |
|                                   |                             |                     |                 |               |                           |
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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.

| FirsiDynix Symphony WorkFlo     | ws: CheckIn : Identify Item               | Alase Collary Cally          | sparster, many Manual And            | _                           |                           |
|---------------------------------|---|------------------------------|--------------------------------------|-----------------------------|---------------------------|
| File Edit Wizards Help          | oers Modules Preference To                | ols Help                     |                                      |                             | Centenary-P               |
| Acquisitions   Booking   Catale | oging   Circulation   Configuration   IL  | L Offline Reports Requests R | eserves   Selection   Serial Control | Student Circulation Utility |                           |
| Common Tasks 🛞                  | CheckIn : Identify Item                   |                              |                                      |                             | - 🗆 ×                     |
| CheckOut                        | P   |                              |                                      |                             |                           |
| 🖺 CheckIn                       | Identify item                             |                              |                                      |                             |                           |
| Item Search and                 | Item ID:                                  |                              |                                      |                             |                           |
| 💑 Display User                  | List of discharges                        | 1                            | 1                                    |                             |                           |
| Renew by User                   | Title<br>The Awakening : an authoritativ. | Item ID<br>. 30089100202420  | Route/Transit To                     | Amount Billed               | Amount Paid Automatically |
| W Renew Item                    |   |                              |                                      |                             |                           |
| Discharging Book                |   |                              |                                      |                             |                           |
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| Display User Holds              |   |                              |                                      |                             |                           |
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|                                 |   | C                            | Discharge Clear                      |                             |                           |
|                                 |   |                              | Item (o) Discharge List Clear        | ose                         |                           |

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.

| W SirsiDynix Symphony WorkFlo  | ows: Gadget : Day and Time  | - • ×       |
|--|-----------------------------|-------------|
| File Edit Wizards Mod  | dules Preference Tools Help | Centenary-P |
| File Edit Wizards Mod<br>Student Circulation<br>Common Tasks<br>CheckOut<br>CheckIn<br>Display User<br>Renew by User<br>Renew Item<br>Check Item Status<br>Check Item Status | dules Preference Tools Help | Centenary P |
|  | OK Cancel                   |             |

| WF SirsiDynix Symphony WorkFlor | ws: Discharging Bookdrop : Discharg | e Items For 07/15/2013,23:59 |                  | a water         |                           |             |
|---------------------------------|-------------------------------------|------------------------------|------------------|-----------------|---------------------------|-------------|
| File Edit Wizards Help          | ers Modules Preference              | Tools Help                   |                  |                 |                           | Centenary-P |
| Student Circulation             |                                     |                              |                  |                 |                           |             |
| Common Tasks                    | Discharging Bookdrop : Dischar      | ge Items For 07/15/2013,23:5 | 59               |                 |                           | - 🗆 ×       |
| L CheckOut                      | ्र                                  |                              |                  |                 |                           |             |
| CheckIn                         | Enter Date of Discharge             |                              |                  |                 |                           |             |
| 😫 Item Search and               | Date: 07/15/2013,23:59              | *                            |                  |                 |                           |             |
| 🚔 Display User                  | Identify item                       |                              |                  |                 |                           |             |
| Renew by User                   | Item ID:                            |                              |                  |                 |                           |             |
| W Renew Item                    | List of discharges                  | 1                            | 1                |                 | 1                         |             |
| Check Item Status               | Title                               | Item ID                      | Route/Transit To | Amount Billed   | Amount Paid Automatically | Message     |
| Discharging Book                | The awakening                       | 30003000311930               | STACKS           |                 |                           |             |
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|                                 |                                     |                              | Discharge        | Clear           |                           |             |
|                                 |                                     |                              | Item (o) Disc    | arge List Close |                           |             |

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.** 

| 💵 Item D | ischarged - 3  | 100092283   | × |
|----------|--|---|---|
| (j)      | Hold is availa   | able  |   |
| 7        | Item ID:<br>Call number:<br>Copy:<br>Title:<br>Author: | 3100092283<br>FIC GRA<br>1<br>Halftime<br>Grab, Daphne. |   |
|          | Routing Inf  | formation   |   |
|          | route to: H  | OLDS  |   |
|          | Item on ho   | ld for:   |   |
|          | User ID: 21<br>Name: Mu                                | 0000008<br>Irphy, Charles                               |   |

#### 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.

| Search I Need Materials Course Re<br>Go Back Help Permalink Logout | Catalog<br>eserves Quick Links Magale Libraries Other Library Catalogs My Account Contact Us |  |
|--|--|--|
| Basic Search   | words or phrase 💌 Search   | Library Info<br>Hours<br>Staff<br>Services<br>Policies<br>More information |
| Go Back Help Permalink Logout                                      | Search the library catalog on Facebook or on your mobile phone!                              | Top<br>Copyright © 2000 - 2013, SirsiDynio                                 |

## **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.

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

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

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| 2.<br>Design History<br>ART 250<br>3.<br>Interdisciplinary 5<br>ART 290<br>4.<br>Representation of<br>ART 291   | tudies: Art and English<br>the Holocaust   |  |  |

• **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.

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

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

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

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