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Overview

The Symphony Administration training course provides a basic understanding of the Symphony software, provides an overview of administrative and maintenance activities, and explains configuration options available through the program.

Who should attend?

Library staff responsible for Symphony Administration

Prerequisite

Symphony Essential Skills

NOTE
If you are a new administrator and were unable to attend the training class, please read the Essential Skills training guide.

Course Objectives

After completing this course, you will be able to:

• Install and configure WorkFlows
• Perform access control functions including creating new user records for logins and creating login components that include profile, environments, and user access
• Understand the library policy and create library groups
• Understand and make changes to circulation and cataloging policy files and user policies
• Define a format and manipulate formats for individual use
• Understand, create, and schedule administrative reports
• Create links to various Z39.50 servers
• Load bibliographic records
If you need to know more about a subject, instructors will gladly speak with individuals during breaks or after class. In addition, the Client Care section of SirsiDynix’s website and WorkFlows Online Help provide powerful information tools for further learning.

Course Schedule

Day 1

System Administration Basics

- Installing and configuring WorkFlows
- Navigating WorkFlows
- Customizing and saving toolbars
- Understanding properties including Behavior, Defaults, and Helpers
- Using WorkFlows Online Help

Access Control Configuration

- Creating Logins
- Customize Policy List wizard
- Operator Policy
- Environment Policy
- Station Policy
- Customize Policy List
Day 2

**User Configuration**
- User Profile Policy
- User Category Policies
- User Address Format Policies
- User Extended Information Format Policies

**General Configuration**
- Library Policy
- Library Calendar wizard
- Location Policy
- Search Library Policy
- Library Group Policy

**Circulation Configuration**
- Item Type Policy
- Bill Reason Policy
- Billing Structure Policy
- Loan Period Policy
- Circulation Rule Policy
- Circulation Map Policy
- Payment Type Policy
- Unsuspend Reason
- Default Price Policy
- Hold Map Policy
- Fee Map
- Maximum Group Fee
Day 3

**Cataloging Configuration**
- Catalog Format Policy
- Keyword Index Policy
- Classification Policy
- Holding Code Policy
- Item Category Policies
- Language Policy

**Reports**
- Report Session Settings
- Setting up and saving report templates
- Scheduling reports
- Administrative Reports
- General Reports
- Required Maintenance Reports
- Reports Maintenance
Day 4

**Reports**
- Discard Reports
- Patron Notices

**Z39.50**
- Creating new Z39.50 connections

**Record Loading**
- Loading bibliographic records
- Loading users

**Global Configuration**
- Overview
## Documentation Conventions

To help you move through the guide easily, the following documentation conventions are used.

<table>
<thead>
<tr>
<th>What you click or select</th>
<th>Appears in bold type (for example, on the <strong>File</strong> menu, select <strong>Save</strong>)</th>
</tr>
</thead>
<tbody>
<tr>
<td>When you see two keys separated by a plus sign</td>
<td>Hold the first key, press the second key, and then release both keys</td>
</tr>
<tr>
<td></td>
<td>ALT+C, for example, means hold down the ALT key, then type <strong>C</strong></td>
</tr>
<tr>
<td>When you see ![NOTE]</td>
<td>Offers useful reminders</td>
</tr>
<tr>
<td>When you see ![CAUTION]</td>
<td>Failure to take or avoid a specified action may result in loss of data</td>
</tr>
</tbody>
</table>
System Administration Basics

Overview

This section explains how to install and configure WorkFlows. Anytime a final step mentions to “halt and run the Symphony servers,” users with a Windows platform will stop and start the Symphony services.

WorkFlows Installation

The WorkFlows client is located on your server.

For Unix servers

/s/sirsi/Unicorn/Clients/fupd_jwf.exe
(for the full client)

/s/sirsi/Unicorn/Clients/upd_jwf.exe (for use after a server upgrade)

For Windows servers

d:\Sirsi\Unicorn\Clients\fupd_jwf.exe
(for the full client)

d:\Sirsi\Unicorn\Clients\upd_jwf.exe
(for use after a server upgrade)

1. Double-click the appropriate file to start the WorkFlows Install Shield.
2. A graphical interface guides the installation. For standard installation, give affirmative answers to all questions. For example:
   - Finish
   - Next
   - Yes

3. The install shield closes after installation is complete.

## Configuring WorkFlows


![Configuration Window](image)

To open the Configuration window once logged in, click **Configuration** on the **Preference** menu.

The Configuration window specifies the Internet address of the host machine and port number, the name of the workstation, and whether to display the Configuration step at each startup.
Delivered Logins

As part of the installation of your Symphony system, SirsiDynix creates User ID logins for you. Logins control the wizards a user can use.

**ADMIN**

System administrator login with access to all wizards.

PIN ________________________________

**TECH**

Technical services login with access to wizards needed for technical services work such as cataloging, serials control, acquisitions, etc.

PIN ________________________________

**CIRC**

Public services login with access to wizards needed for public services work such as circulation, reference, etc.

PIN ________________________________

For multilibrary customers, SirsiDynix creates a CIRC and TECH login for each library. For example, if a multilibrary system has libraries called MAIN, EAST, and WEST, they will have logins like this:

- **MAINCIRC**
- **MAINTECH**
- **EASTCIRC**
- **EASTTECH**
- **WESTCIRC**
- **WESTTECH**

You will learn how to create other logins later in this training on page 43.
Changing the Desktop

WorkFlows has two desktop views: Classic WorkFlows and Themes. This training class will use the Themes view. Themes provides an interface that helps you navigate quickly between Symphony modules. It also lets you choose several color palettes, which you can change as described below.

To change from Classic WorkFlows to Themes

1. On the menu bar, click Preference – Desktop – Desktop Setup

The following window appears:

Select this checkbox to allow more than one wizard to be opened at a time.
2. In the Themes box, select a color you want to use for your Desktop, and click OK. The following message appears.

![Message box](image)

*These changes will not go into effect until you restart the workstation.*

3. Click the X in the upper right corner of the window to halt the workstation. When you restart the workstation, the new desktop Theme will appear.

**NOTE**  
If you are already have a Themes desktop, and you want to change colors, a restart is not necessary.
WorkFlows Help File

Overview

The WorkFlows Help file is the primary source of documentation for each Symphony module. The Help file can give you immediate context-sensitive assistance while you are working in WorkFlows. In addition, it provides numerous FAQs and other information that give you background and in-depth information on specific topics.

The WorkFlows Help file is context-sensitive. This means that the Help information that displays is specific to the task you were performing when you accessed the Help file.

Help topics display in a separate window. You can leave the Help window open and toggle between the task window and the Help window when performing procedures. You can also print individual Help topics.

Accessing Help

You can access the Help file several ways:

- On the toolbar, click ![Help Icon]. This opens the context-sensitive Help.
- Press F1. This also opens the context-sensitive Help.
- Right-click any wizard or group wizard.
- On the menu bar, click Help.

![Help Window]

Contents...  
Context...  
Key Enhancements...  
Session Info...  
About...
When accessing the Help file from the menu bar, you have five choices:

- **Contents** – This option opens the Table of Contents for the Help file.
- **Context** – This option opens the context-sensitive Help.
- **Key Enhancements** – This option displays summaries of new features available in this release.
- **Session Info** – This option displays login and host information about the current WorkFlows session.
- **About** – This option displays the software version and the SirsiDynix copyright statement.

**NOTE**

In the process of troubleshooting, and in correspondence with SirsiDynix Client Care, it is often necessary to provide detailed information about the client session. This information may be accessed by clicking Session Information on the Help menu. Detailed login information such as the user’s login, user access, environment, profile, and station library are provided. Detailed server information including server IP address, server platform, and server version number are also available.
Inside the Help File

Tabs on the Navigation pane give you three ways to locate information:
• **Contents** – This tab displays topics alphabetically by module.

- Workflows Online Help
- Copyright Statement
- Contacting Sirsi Client Care
- Getting Started
- Getting Help
- Searching Workflows Online Help
- Where to Find Sirsi Documentation
- About Sirsi Clients
- Academic Reserves
- About Academic Reserves
- Academic Reserves Wizard Toolbar
- Academic Reserves Wizards Properties
- Working with Academic Reserves
- Academic Reserve Fields
- Reserve Items Information Tabs
- FAQs
- Acquisitions
- About Acquisitions
- Acquisitions Wizard Toolbar
- Acquisitions Wizards Properties
- Acquisitions Properties Fields
- Working with Acquisitions

• **Index** – This tab displays an alphabetical list of topics

- 948 entries in date stamping and shadowing
- 944 entries in copy processing
- Academic reserves
- About reserve statuses and stage relations
- Administration
- Interaction of records within
- Overview
- Report groups
- Reserve item information tabs
- Reserve wizards properties fields
- FAQs: Getting started with academic reserve
- Reserve scenarios
- Toolkit
- Accepting partial bill payments
- Access control configuration wizards
- Accountability group reports
- Accountability tab
- Acquisition configuration wizards
- Activity report
- Add a new profile helper
• **Search** – Type a term or terms in the box, and the search engine will locate these terms anywhere in the Help file.

The numbers before the topic indicate the number of times that the search query appears in the topic. The information displays in the Content pane on the right with the search term highlighted within the text.

---

**Help Menu**

The **Help** menu can be used to display the Documentation page of the Workflows **Help**, the **Help** topic associated with the current window, and information about the software. The following options are available:

- **Contents**
- **Context**
- **Key Enhancements**
- **Session Info**
- **About**

**Contents**

Click Contents to display the Documentation page of the Workflows **Help**.

**Context**

Click Context to enable context-sensitive **Help** and display the **Help** topic associated with the current window. Context sensitive **Help** can also be displayed by clicking the **Help** button (book with question mark) on a toolbar, by pressing the F1 shortcut key, or by right-clicking the mouse over a wizard icon and selecting **Help** from the shortcut menu.
Balloon Help/Tool Tips

Balloon Help displays in a box below the cursor when you hold the mouse over a wizard or group wizard. These are sometimes called Tool Tips.
Workflows Window

Menu Bar

The menu bar lets you access basic Windows and Workflows commands. For complete information about the options on the menu bar, see the Workflows Help file.

File

Use the File menu to preview and print the current client window, update the staff client, and exit Workflows.

Edit

Use the Edit menu to cut, copy, or paste selected text in the current window.

Modules

Use the Modules menu to select the wizards on the current toolbar using keyboard commands (as described earlier).
Preference
Use the Preference menu options to change the display and functionality of individual workstations.

- **Configuration** – Click this command to display the Configuration window:

![Configuration Window](image)

- **Peripherals** – Sets options for receipt printers, barcode readers, and barcode configuration.
• **Desktop** – Selects a toolbar and specifies window options.

<table>
<thead>
<tr>
<th>Preference</th>
<th>Tools</th>
<th>Help</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configuration...</td>
<td>Offline</td>
<td>Reports</td>
</tr>
<tr>
<td>Peripherals</td>
<td>Font Settings...</td>
<td>Resource</td>
</tr>
<tr>
<td>Desktop</td>
<td>Current toolbar</td>
<td>Localization</td>
</tr>
<tr>
<td>Maintenance</td>
<td>Function Key Mapping</td>
<td>Desktop Setup...</td>
</tr>
</tbody>
</table>

- **Font Settings** – Customizes the workstation font.
- **Current Toolbar** – Contains the following options:
  - **Select** – Provides a way to change the toolbar using keyboard commands. This does the same thing as right-clicking the toolbar.
  - **Save As** – Lets you save a customized toolbar to the workstation.
  - **Function Key Mapping** – This option lets you assign function keys to various wizards.
  - **Local Toolbar Management** – Lets you modify a delivered toolbar. You can also use it to assign function keys. For complete information about toolbar management, see the “Modifying a Toolbar” or “Changing the Current Toolbar” topics in the Help file.
  - **Localization** – If your site is multilingual, you may be able to change the language of the interface.
- **Desktop Setup** – This option lets you select the following features:

  Select this checkbox to allow more than one wizard to be opened at a time.

  ![Preference: Desktop Setup dialog box](image)

  For complete information about desktop setup, see the “Changing the Desktop Setup” topic in the Help file.

**Toolbars**

The Module Toolbar across the top of the WorkFlows window changes the toolbar that appears on the left side of the window.

A toolbar is a collection of individual wizards or wizard groups. By default, each module in WorkFlows has its own toolbar, but you can customize toolbars to meet your specific needs.

For complete information about changing the wizards that appear on various toolbars, see the “Modifying a Toolbar” or “Changing the Current Toolbar” topics in the Help file.
Terms to Know

Gadget

A gadget is a button next to a text box that provides options you can use in a particular box. When you click the gadget, a window appears giving you a list of predefined values, calendars, etc. Always click the gadget (if one is available) to make sure you enter the correct information in the correct format.

Glossary

This term refers to any text or character in WorkFlows that appears with a dashed underline. When you click this text or character, a popup window appears with additional information. For example, if you click Alerts, the following information appears:
**Helper**

A helper is a "wizard within a wizard." Helpers are positioned in a menu bar just below the active window’s title bar.

Helpers listed on the left side of the bar make it easier to access information needed by the current wizard. Helpers listed on the right side of the helper bar are used when adding or deleting field information. These helper buttons may include Before, After, Delete, Restore, and Erase helpers.

**Shadow Catalog**

The shadow catalog contains records searchable only by library staff. For example, you might want to hide or “shadow” records from patrons, such as lost or missing items or items still being cataloged. Users at public workstations can search and display items only from the standard catalog. Users at staff workstations using WorkFlows can search and display items in the standard catalog, the shadow catalog, or both.
Wizard

A wizard guides you through the steps to accomplish a task.

Wizard properties let you customize how wizards work. Each time you click a wizard, you can change the properties. Library staff can save changes to individual workstations; system administrators can save changes to the server.
Wizard Properties

Overview

Properties provide window defaults and various control settings for each wizard. There are three types of wizard properties: Behavior, Defaults, and Helpers.

To display the Set Properties window, right-click the wizard, then click Properties on the shortcut menu. The Behavior tab appears.
**Behavior Tab**

Only system administrator and supervisor-level logins can view wizard behavior properties. Administrators can make changes and save to the server; supervisors can only save changes to the PC.

Wizard behavior modifications can include:

- Preset certain field values
- Control how the wizard works

![Behavior Tab Example](image)
**Defaults Tab**

Using the Defaults tab, staff can preset field values and select what information should display.
Helpers Tab

Only system administrator and supervisor level logins can view helper properties. Administrators can make changes and save to the server; supervisors can only save changes to the PC.

Using check boxes, system administrator and supervisor level logins can adjust helper properties by enabling or disabling certain helpers.
Some helper properties display with Additional Information buttons in the Configure Properties column. This indicates that the helper has its own Behavior, Defaults, and/or Helpers properties.

To open the helper's properties window—on the Helpers tab, under Configure Properties, click the button containing the helper name you want to configure:

Make appropriate changes, and click **OK** to save. Some helpers are used for multiple wizards. If you change a helper property, the results display globally—within each wizard that contains that helper.
Load and Save Properties to the Server

Symphony system administrators can use the Save properties wizard to make changes to properties for different user access groups. For example, while logged in as a system administrator, you can load and modify properties for a Circ group.

To load and save properties to the server

1. On the Utility module toolbar, click the Save Properties wizard. The following window appears:

   [Image of the Save Properties window]

   Select the property file you want to work with:

   - [Property directories]

2. In the Select the property file you want to work with box, select the appropriate file from the list, and click Load.
3. Click the + in front of the toolbar you want to work with, click the wizard you want to work with, and click **Modify**. The Set Properties window displays.

4. Make necessary changes to the wizard’s properties, and click **OK**.

5. Choose additional wizards, and make changes, as necessary.

6. When you are finished with all changes, click **Save** to save the properties on the server.
Save Properties to Local PCs

Staff members may want to save property changes to their own PCs. Property changes saved to a PC take precedence over property files on the server.

To save properties to the PC

1. Right-click individual wizards, and then click Properties.
2. Make appropriate changes, and click OK.
3. Upon exiting WorkFlows, you will be prompted to save the property changes.

Saved properties

Properties are saved to the Documents and Settings folder on the PC. Each Windows login has its own set of properties for WorkFlows.

..\Documents and Settings\login\Sirsi\Workflows\Property

The following files can be found in the above directory:

- **property** Local properties saved to the PC
- **site** Properties saved to the server
- **system** Delivered defaults
- **preferences** Settings, such as window sizing and fonts
Customize Toolbars

Overview

A toolbar is a collection of individual wizards or wizard groups. By default, each module in WorkFlows has its own toolbar, but you can customize toolbars to meet your specific needs.

For example, you can create custom toolbars to limit the wizards available to a certain group of staff members. You could also create a custom toolbar for staff members who use multiple toolbars. Combining wizards on one toolbar would save time from switching back and forth between toolbars.
Customize and Save Toolbars to the Server

Symphony system administrators can use the Toolbar Management wizard to make changes to toolbars or create new ones.

To customize a delivered toolbar

1. On the Utility toolbar, click the Toolbar management wizard. The following window appears:

2. In the Delivery Toolbar Files list, right-click the toolbar you want to customize. The following pop-up window appears:
3. Click **Copy To Customize**. The toolbar appears in the Customized Toolbar Files list. Click the + to open the toolbar:
4. To delete a wizard from the toolbar, right-click the wizard, and click **Remove**:

![Toolbar with Remove option highlighted]

5. To add a wizard to the toolbar, right-click the toolbar, and click **Add Wizard**:

![Customized Toolbar Files with Add Wizard option highlighted]

**NOTE** Although any wizard can be added to the toolbar, you cannot use a wizard unless your Access list permits its use, or you know the override code defined by the system administrator.

6. When finished adding or deleting wizards, click **Save On Server** to save the customized toolbar.
Customize and Save Toolbars to Local PCs

All staff can use the Toolbar Management option to make changes to toolbars or create new ones.

To customize a delivered toolbar

1. On the menu bar, click Preference > Desktop > Current toolbar > Local Toolbar Management. The following window appears:
2. In the Delivery Toolbar Files list, right-click the toolbar you want to customize, and then click **Copy to Local**:

![Image of Local Toolbar Management](image)

The toolbar appears in the Local Toolbar Files list.

3. Click the + to open the toolbar:

![Image of Local Toolbar Management](image)

4. To delete a wizard from the toolbar, right-click the wizard, and click **Remove**.
5. To add a wizard to the toolbar, right-click the toolbar, and click **Add Wizard**.

The following window appears:

![Wizard Creation Window](image_url)
6. In the **Wizard** box, click the wizard from the list that you want to add to the toolbar.

7. Select a toolbar image for the wizard from the toolbar image drop-down menu.

8. To assign a keyboard shortcut, choose a function key from the **Key Sequence** drop down list. The Alt and Shift boxes may be checked to utilize additional keyboard shortcuts by combining a function key and/or Alt or Shift.

9. Click **OK** to add the wizard to the toolbar. Click **Close** to exit the Local Toolbar Management window.

---

**NOTE**

You can add any wizard to the toolbar. However, you cannot use this wizard unless your Access list permits its use, or you know the override code defined by the system administrator.

Function Keys assignments can also be made or modified from the Function Key Map.

1. On the menu bar, click Preference > Desktop > Current toolbar > Function Key Mapping. The following window appears:

![Function Key Mapping](image)

2. In a function key box, such as the F2 box, use the drop-down list to select a wizard. Only unmapped wizards will appear in the list. The Shift and Alt boxes can be checked to utilize additional function key shortcuts.
3. After making selections for function key mappings, click OK to save your changes.

**Note:** The following function keys and key sequences cannot be mapped: F1 (Help button), F6, F8, F10, SHIFT+F10, and ALT+F4. These function keys/sequences are reserved for Windows functions.
Create New Logins

Overview

For most situations, creating a new login is as simple as creating a new user record and assigning the appropriate User Profile and Library policies. If there is not a User Profile policy that includes the desired User Access and Environment policies, you may need to create new policies. You can locate these policies using the Configuration toolbar.

- **User Profile** – User Configuration wizard
- **User Access** – Access Control Configuration wizard
- **Environment** – Access Control Configuration wizard

The following diagram illustrates the relationship between the User Profile, User Access, and Environment policies.

After creating new policies, you must halt and run the Symphony servers to make the new policies available. Open the Circulation toolbar to create the user record with the New User Registration wizard, and then attach the new user profile to the user record.
Create a New WorkFlows Login

Check your User Access policies to determine whether you need to create a new policy for this staff member. If an appropriate User Access policy exists, proceed to step 19.

If you need to create a new User Access policy, you can copy an existing policy and make changes as needed. For example, you might choose to copy the CIRC User Access because the new login will need many of the CIRC functions.

To create a new WorkFlows login


2. Click Create. The following window appears:
3. In the **Name** box, type the policy name. Do not include spaces or punctuation, except an underscore (_).

4. In the **Description** box, type the policy description. This only displays in WorkFlows.

5. Select a **User level**. The user level has five functions:
   - User level controls the PINs staff can view in a user record. If a staff member modifies a user record with the same or higher user level as that staff member’s login, the staff member will not be able to see the PIN. Staff can only see the PIN on a user record that represents their WorkFlows login or user records with a lower level login.

   **Example** – the CIRC login has a user level of Staff. With this level of access, staff can see the PINs for all user records with a level of Public and Extended Public, along with the PIN for the CIRC user record. They will not be able to see the PIN for a supervisor or system administrator. System administrator level logins can see all PINs.

   - User level controls the type of user record staff can create. They can create a user record with a level below their own.

   - User level controls the properties staff members can access.
     - **Staff** – Logins can only see default properties.
     - **Supervisor** – Logins can see all properties.
     - **System Administrator** – Logins can see all properties.

   **NOTE** Any login can save property changes to the PC, but a user needs access to the Load properties and Save properties wizards in order to save property changes to the server. This access is assigned in the Access list tab of the User Access policy.

   - Certain OPAC elements use user levels to limit access in iBistro/iLink.
- User level controls the templates, scheduled reports, and finished reports a login can view. Staff and Supervisor-level logins can only view reports owned by that login. System Administrator level logins can view all reports.

   - **Shared** – Usually used for logins shared by more than one person.
   - **Personal** – Allows a person to log in and to change the PIN in the OPAC, as well as view their user account.

7. In the **Simultaneous users** box, type the number of users that can login at the same time using this user access.

8. Select a **Request list** from the list. As delivered, a Request List is only used by WebCat, although iBistro/iLink sites could choose to use this feature.
9. Select a **Command list** from the list. InfoVIEW uses the Command List to control which functions a staff member can use. WorkFlows controls this through the Access List, although it is important to have a command list assigned. Parts of WorkFlows use a command, such as HALT WORKSTATION, that allows a person to log out of WorkFlows. Generally, you can assign an existing command list and not create a new one.

10. Click the **Report group list** gadget to select the report groups this user access will see when using the Schedule New Reports wizard.

11. Select the appropriate administrator-defined set of **Properties** from the list. WorkFlows properties specify which field’s display, which helpers and behaviors are available, and the default values for required fields.

12. Check the option to **Show Customized policy list** if you want to allow this login to view custom dropdown lists for various WorkFlows policies.

**Note** The Customize Policy List wizard is discussed on page 53.

13. Select individual toolbars for this login to view. By default each login using this access policy will see all toolbars unless the gadget is used to select specific toolbars.

14. Click **Save**. The List Policies window reappears.

15. Select the new policy you just created, and click **Modify**. The User Access Policy window appears.

16. Click the Access list tab. The following window appears:
Access List Tab

The Access List controls the wizards this login can use.

17. Click the + next to a module. The list of wizards for that module appears.

18. Select the check boxes for the wizards you want to include in the User Access policy.

19. Click Save, and then click Close.

20. If you created a new User Access policy, or there is not an existing User Profile policy that contains your User Access policy, create a new User Profile policy. You can choose to copy an existing user profile, and then modify it to assign the new user access. These steps are provided below.
To create a new user profile by copying an existing profile

1. On the Access Control Policies toolbar, click the User Profile Policy wizard.
2. From the List Policies window, select a policy, and click Copy.
3. Type a name in the New policy name box, and click OK. This name should be the same as the User Access policy created above. The User Profile Policy window appears.
4. Click the Login attributes tab.
5. Select the User access created above from the list.
6. Click Save.

NOTE If you created new policies, halt and run the Symphony servers before proceeding to New User Registration.

To create a user record

1. Change to the Circulation toolbar.
2. Click the New User Registration wizard. The User ID and PIN entered in the user record will be used for the WorkFlows login. Assign the appropriate Library and User Profile policies.
PINs

The Personal Identification Number (PIN) is a personal code optionally assigned to every user in the system. PINs are random 1-10 digit combinations of letters and numbers. After correct entry of both the user ID and PIN, the user can access confidential information about their circulation status.

To change a PIN

1. On the Circulation module toolbar, click the User Information and Maintenance toolbar.
2. Click the Modify User wizard.
3. Search for the user.
4. Click the Privilege tab. The following window appears:

5. Type the new PIN.
6. Type an Override that has the User Privilege override capability attached.
7. Click Modify User to save the new PIN.

NOTE  WorkFlows compares the user’s access level to the record’s access level. If the user’s access level is not above the record’s access level, the login PIN on the Privilege tab cannot be modified.
Global Wizard Access Policy

The Global Wizard Access Policy wizard allows you to add and remove user access to a group of wizards globally.

To globally modify user access

1. On the Access Control Configuration toolbar, click the Global Wizard Access Policy wizard. The following window appears:

2. Click the + next to a module. The list of wizards for that module appears.

3. Select the check boxes for the wizards you want to add to or remove from User Access policies.
4. Click **Add wizards to User Access policies** to add the selected wizards.

- Or -

Click **Remove wizards from User Access policies** to remove the selected wizards.

The following window appears:

5. Select the check boxes for the User Access policies you want to modify.

6. Click **OK**. WorkFlows adds or removes the wizards from the Access List for the selected User Access policies.

7. Click **Close**.
**Customize Policy List Wizard**

Using the Customize Policy List wizard, it is possible to customize the list of policies presented in wizard drop-down lists. You can create custom policy lists system-wide or for any library on the system.

### Customizing a policy list

To customize policy lists, do the following steps.

1. Click the Customize Policy List Wizard.
   
   The module tabs with lists of policies that can be customized appear. Not all policies are included in these lists, only those that can be customized.

2. Click a module tab.

3. A list of policies that can be customized appears.

   **Note:** The Per Library column to the left of each policy description indicates whether or not the policy list has been customized for any library.

   - Select a policy on this tab.
4. The first time you customize a policy the confirmation dialog box appears and asks whether you want to customize this policy system-wide or by library.

Click either the System Wide or Per Library radio button. By default, System Wide is selected.

- If you select System Wide the wizard will display all possible policy values for the selected policy that appear on the system.
- If you select Per Library the wizard displays folders in the left pane for each library on your system. Select a library from the pane to customize the policy list for that library.

**Note:** The confirmation window will not appear again. You will need to use the customize policy list helpers to make changes to custom policy lists.
5. The following window appears. Click one of the following options.

- **Includes Selected Policies** - Select the Includes Selected Policies radio button and select the check boxes next to the policies you want to include in the customized policy list. This method is effective if you want to include only a few policies in the list.

- **Excludes Selected Policies** - Select the Excludes Selected Policies radio button and select the check boxes next to the policies you want to exclude from the customized policy list. This method is effective if you are only excluding a few policies.

- **Select All** - With either option, you can click Select All or Unselect All to select or clear all policy check boxes. You cannot exclude all policies from policy lists; at least one policy must be included.

6. Click Save to save the customized policy list for this library.

7. To customize the policy list for another library, select that library's folder in the left pane, and make your policy selections.

8. Click Save to return to the module tabs.
Access Control Configuration

Overview

Access Control policies control the following functions:

- Determine how to access Symphony.
- Specify what types of terminals the library uses as workstations.
- Configure commands and wizards for a particular user or a class of users.

The Access Control Policies toolbar contains the following wizards:

- User Access Policy
- Global Wizard Access Policy
- Station Policy
- Request List Policy
- Operator Policy
- Environment Policy
- User Profile Policy
- Command List Policy
- Barcode Policy
- Barcode Validation Policy
- Barcode Exempt Policy
- Barcode Verify
Operator Policy

Each Operator definition consists of a unique Operator ID, a description of where it has been assigned, a user access, and a list of protected conditions that the Operator ID can override. Operator IDs are used to execute commands and wizards at a workstation that are not permitted in the current user’s defined access list, and to bypass (override) certain system blocks.

To access the Operator policy

1. On the Access Control Configuration toolbar, click the Operator Policy wizard. The List Policies window appears:

2. To create a new operator policy, click Create. The following window appears:
Operator Policy Attributes

Name

Name can be any word or name (10 characters or less) and cannot include spaces or punctuation except a dash ( - ) or underscore ( _ ). Keep the name confidential. The ID uniquely identifies each Operator policy. Any number of operator IDs can be defined for different functions and for different staff members.

NOTE

Unlike other policy names, you can modify the Operator policy name. Operator policy names act as passwords in Symphony, so it is wise to change them occasionally.

Description

Description can be used to identify the assignment, such as CIRCHHEAD, CLERK1, or BSMITH. You can assign each Operator ID to a specific library staff member or to a library department.

Overrides

An operator ID typed in an Override field establishes the authority to ignore the system blocks specified in the Override list. Use the Overrides gadget to select one or more overrides. For a description of each override, see the WorkFlows Online Help.
User access

Choose a user access from the list.

The User Access policy determines the wizards a given user can use. At the WorkFlows login, Symphony verifies the User Access policy, and only downloads appropriate wizards. An Override window displays if a user attempts to execute a wizard that is not permitted.

After entering an Operator Policy ID, the system checks the user access associated with the Operator policy to ensure that the wizard is authorized for use. By entering an Operator policy, a user is permitted temporary access to wizards allowed for another user access.

CAUTION  If the User Access box is blank, you cannot have temporary access to the wizards specified in the User Access policy.
Environment Policy

The Environment policy defines a named set of windows, a gateway, and additional information that comprise the overall appearance and configuration settings in the Symphony workstation.

To access the Environment policy

2. To create a new environment, click Create. The following window appears:
Environment Policy Attributes

Name
Name represents the library, user profile, or user access to be assigned this environment. The attribute accepts 1-10 characters and cannot include spaces or punctuation except ( - ) or ( _ ).

Description
Description provides additional information about the policy and its use by the library. The description can be up to 60 characters in length.

Screens directory
Each Environment policy must include a screens directory that specifies a directory on the host computer containing the windows used by a group of users. The “Generic” screen directory contains the library’s standard configuration defaults and values and is always available. Other screen directories may also be available, each with some different input fields, field labels, default field values, and other library configuration options defined for use by a certain department or for a particular procedure. This attribute does not affect the Java WorkFlows client.

System logging
As a rule, the system logging option for each Environment policy should be cleared (off). System logs are daily records of every command (request and response) issued by a workstation client. This log is optional and is never compiled full time because it uses a lot of disk space. If system logging is used, the Symphony administrator must monitor disk storage on the host computer daily. Use system logging mainly for training and/or investigative purposes.

Host timeout
This attribute sets the number of seconds before the workstation client logs out if it receives no response from the host computer. The timeout interval can be from 60-500 seconds, or zero.

Zero disables this attribute. By disabling the host timeout, the workstation will not log out, regardless of how long it takes the host computer to respond.

Search output limit
This attribute specifies the greatest number of search results the user can mark for printing, downloading, or e-mailing. The limit can be from 0-24,999 records.
Search sort limit

This attribute specifies the maximum number of sorted search results. Search results are only sorted if the number of retrieved records is less than the specified search sort limit. The limit can be from 0-24,999 records.

Gateway database

This attribute specifies the OPAC Configuration gateway used for any user record that references this environment. OPAC Configuration gateways determine the destinations and services available to an OPAC user.

Search source group

This attribute specifies a group under the user’s default gateway to make Z39.50 destinations available in the SmartPort wizard. The Public Access Choices group is specified so that all available group elements, regardless of where they are organized in the gateway, display as available choices. Z39.50 destinations in the specified group, or in subordinate groups, will be available unless flagged as not available. A default gateway database must be selected for this attribute to become active.

Language

This attribute sets the system’s default language for the workstation session at customer sites that support multiple languages. When a user logs in, WorkFlows uses the default language specified in the user’s environment to display workstation buttons, field labels, flyby and balloon Help, window titles, and messages.
Station Policy

The Station policy name is specified on the Configuration window in WorkFlows. To display the Configuration window, click Configuration on the Preference menu. The following window appears:
Station Policy Attributes

**Name**
Name represents a particular type of workstation, the location of the workstation, or the name of the user. Accepts 1-10 characters and cannot include spaces or punctuation except ( - ) or ( _ ).

**Description**
Description provides additional information about the policy and its use by the library. The description can be up to 60 characters in length.

**Type**
Stations must belong to one of the following categories:

- **Port** – The station is directly connected to a serial port on the host computer. If a station is identified as Port, then the server serial port that the station is connected to must be identified. Port-type stations should be named by the server’s serial port name, for example—TTY6 or TTY14. Port-type stations require the Library, Location, Port, and Terminal attributes.
Named – Although the station is not directly connected to the host computer, it has a fixed purpose and library location, such as a circulation terminal connected to the host through a local network. Named-type stations should be identified by location, for example—CIRC3 or PUBLIC5. Named-type stations require the Library, Location, and Terminal attributes (Port cannot be defined because it will always be different).

Floating – The station accessing the system is not directly connected to the host computer and not located physically within the library (has no fixed library function). Floating-type stations should be identified by Terminal Type name, for example—WYSE30 or VT100. Only the Terminal attribute is required for Floating stations. The Library, Location, and Port attributes cannot be defined.

Library

If a Station policy has the Type field set to Port or Named, the station also requires a Library attribute. The established library names have been entered in the Symphony polices. This 1-10 character library ID is required for both single and multi-library systems. This field references the Library policies.

Location

If a Station policy has the Type field set to Port or Named, then the station also requires a Location attribute. The established locations have been entered in the Symphony polices. Use this 1-10 character location name to instruct the workstation client to print a Route To shelving slip when discharging a book that does not have the location of the current station (if shelving slips are required by the library). This field references the Location policies.

If a circulation desk station identification contains a Location attribute of STACKS and a book with a home location of GOVTD OCS is discharged, with a configured, online receipt printer, the workstation client prints a routing slip with the following message.

```
route to GOVTD OCS
```

Port

If a Station policy has the Type attribute set to Port, the station also requires a UNIX port or TTY name.
Terminal

Each station must have an assigned UNIX terminal name. UNIX terminal names are not the same as station names; the library cannot create new terminal names. The /Unicorn/Custom/terminaltype file lists all terminals supported by SirsiDynix. If the library has a workstation in the library not on this list of UNIX terminal names, contact Client Care for assistance.

NOTE If you are using a graphical client, select wsgui from the list.

Character translation

If a Station policy needs to allow other terminal emulation and if characters need to be changed from one series to another, select the appropriate character translation table. This field references the Character Translation policies.

Color workstation

This attribute should be selected for workstations with a color PC, terminal, or X terminal. Click to clear this check box for monochrome PCs, terminals, and X terminals.

Platform

This attribute specifies whether the workstation is a terminal (Host) or PC (Microstation). Symphony uses this field to determine whether key definitions are resident on the PC or supplied by the server.

Receipt printer attached

Select this check box to indicate that a receipt printer is attached to a workstation using this Station.

Reader attached

Select this check box to indicate that a barcode or OCR reader is attached to a workstation using this Station.
To create a named station

Named stations allow you to track transactions that occurred on a PC, such as circulation activity or amount of money received at that PC.

1. On the Access Control Configuration toolbar, click the Station Policy wizard. The List Policies window appears.

2. To create a named station, select PCGUI-DISP, and click Copy. The following window appears:

3. Type a new policy name, and click OK. The following window appears:
4. Next to **Type**, click **Named**.

5. Choose a **Library** from the list.

6. Choose a **Location** from the list.

   Location is a required field if the station type is Named. This field contains one of the Location policy names defined in the General Configuration policies. When you discharge an item that has a different location than the current station, this location name tells the workstation client to print a Route To shelving slip (if your library uses shelving slips). If your library does not print reshelving slips, select any location. The location will not have any special purpose.

7. Click **Save**. The new station policy will be available after you halt and run the Symphony servers.

8. To select the new named station, log in to WorkFlows. On the **Preference** menu, click **Configuration**. In the **Name** list, select your new station. Click **OK**. The following message displays, “These changes won’t go into effect until you restart the workstation.”
**Exercises**

**Exercise 1**

**Scenario:** You have volunteers working in your library that should have limited access to circulation functions. You want to restrict access to the following features:

- Register new users
- Renew user privileges
- Extend a user’s library privilege
- Create bills
- Pay bills
- Add brief titles
- Report a lost card
- Change item IDs
- Assign a special due date

There are helpers within certain wizards that would allow them to perform functions not allowed within their User Access policy.

**Action:** Create a new properties file on the server that, when assigned to the “volunteer” User Access policy, would remove access to the helpers listed above. If you need help completing this exercise, follow the steps on page 30.
Exercise 2

Scenario: Create a new user access policy and user profile policy for the volunteers mentioned above. These volunteers should only have access to the following wizards:

- Checkout
- Discharge/Checkin
- Renew User
- Renew Single Item
- Display User
- Checkin Bookdrop Items

Action: Copy an existing user access policy (i.e. CIRC) to make a new one for your volunteers. Modify the appropriate fields to limit access. Next, copy and modify a profile policy (i.e. CIRC) to create one that points to your new access policy. Refer to the steps on page 44.

Exercise 3

Create a custom toolbar that only includes the wizards that will be used by the volunteers in Exercise #2.

Start with the Circulation toolbar and modify it by removing wizards the volunteers will not have permission to use. Save this customized toolbar to the server with a new name. Remember that this custom toolbar will not be connected to the volunteer’s WorkFlows login.
Overview

The User Configuration policy group contains policies used to:

- Gather statistics.
- Define user address fields.
- Control the distribution of items to users unable to come to the library.
- Define limits on circulation activity for specific types of users.

The User Configuration toolbar contains the following wizards:

Note: For more information refer to the Configuration Session Settings section on page Error! Bookmark not defined. if you wish to limit the policies to those of a particular library.
User Profile Policy

Each user in the system has an assigned User Profile policy. User profiles divide library users into groups. The groupings can establish different categories of privileges in the system (for example, juvenile vs. adult or faculty vs. student); or provide identification for statistical purposes (for example, graduates vs. undergraduates).

User Profile Policy Attributes

General Tab

Name

Name uniquely identifies the policy. The Name should be 10 characters or less, and cannot include spaces or punctuation except [ - ] or [ _ ].
Description

Description provides more information about a policy and its use by the library. The description can be up to 60 characters in length.

Location

If the system is configured to embed access fields as part of the User Profile policy instead of displaying them as fields in the user record, the location field is included as part of the User Profile policy. The location field must contain one of the policy names defined in the Location policy. When an item is charged to a user, the item is shown to be at that user’s assigned location name. Special users, such as the library and library departments, would have locations such as CATALOGING, BINDERY, and BOOKMOBILE. Other users might have the location CHECKEDOUT.

Billable

This attribute indicates whether users with a particular user profile can be billed automatically by Symphony because of some fee-based circulation activity.

Privilege limit

This attribute specifies the limit duration. There can be no time limit on a privilege or the limit can be set so the privilege expires in a number of days, weeks, months, or years, or on a specific date.

Privilege fee

When a user is added to the system or has existing circulation privileges extended, the user can be billed according to this field.
### Circulation Tab

The Circulation Tab allows you to configure settings related to circulation policies, such as charge limits and hold limits. Click the gadget to open the user profile policy settings.

### Charge limit

This attribute specifies the maximum number of items any user can have charged at one time. Unlike the overdue and bill thresholds, the user’s delinquency status is not affected when the charge limit is reached. If the user reaches the charge limit, an operator override allows that user to check out additional items. Click the gadget, and type a number from 0 – 24,999, or choose UNLIMITED.

### Charges allowed

When users are added to the system or their privileges are extended, the User Profile policy determines how many total charges they can make before their privilege expires. Click the gadget, and type a number from 0 – 24,999, or choose UNLIMITED.
Hold limit

This attribute specifies the maximum number of items any user can have on hold at one time. Click the gadget, and type a number from 0 – 24,999, or choose UNLIMITED.

**NOTE**  Hold limit is used for placing, not satisfying, holds.

Hold rank

Each title and item in the Symphony database can have a list of users waiting for it to become available. This is the holds queue. Among other criteria, the user profile’s hold rank determines a user’s place in a hold queue. User profiles can be assigned a hold rank from 100 to 199—the lower the number, the higher the rank in the holds queue.

All user profiles can have the same rank allowing everyone the same opportunity to request material (given that other hold criteria are equal).

If your system is configured to use Symphony’s Demand Management feature, hold priority is determined in the following order:

1. Highest priority from the Hold Map policy
2. Highest rank specified in the hold record
3. Earliest date/time the hold was placed

Overdue threshold

Symphony monitors the number of items overdue for every user. If a user has items overdue that pass that user profile’s overdue threshold, the user is blocked from further charging. The overdue threshold can be set to any number desired for each user profile. If set to 0, the overdue threshold is not considered in determining the delinquency status.

Bill threshold

Symphony monitors the amount of money owed by every user, including both bills and accruing fines. If a user meets the bill threshold set in the user’s profile, the user is blocked from further charging. The bill threshold can be set to any amount desired ($0.00 - $10,000) for each user profile. If set to $0.00, Symphony does not consider the bill threshold in determining the delinquency status.
**Overdue recall threshold**

This attribute allows users to be blocked based on the number of overdue recalls associated with a user.

An item will be counted against the overdue recall threshold after the following conditions:

- The item has been recalled.
- The item is overdue.
- At least one recall notice has been sent.

If the number of overdue recalls with at least one recall notice is equal to or greater than the number specified by the overdue recall threshold, the patron’s user status will be set to BLOCKED.

This field does not display for UnicornECOLE systems.

**Maximum suspension amount**

If a user’s privilege has been suspended because of overdue materials, this attribute specifies the maximum number of hours, days, months, or weeks the privilege is suspended.

**Maximum suspension unit**

This attribute specifies how the user’s suspension is calculated. The suspension can be calculated in hourly, daily, weekly, or monthly units.

**Library precedence**

If the library sets a due date for items using the Library policy's loan period attribute, and the library precedence field is selected, the due date in the Library policy takes precedence over the normal due date. If the library precedence field is cleared, the loan period attribute of the Library policy is ignored, and the date the item would normally be due stays in effect.
Increment item record charge counter

This attribute specifies whether an item’s charge should be counted for statistical purposes, based on the user profile of the user checking out the item. If selected, the number of concurrent and total charges placed on the item is incremented. If cleared, the number of concurrent and total charges for the item is not incremented. For example, this attribute should be cleared for a LIBRARYUSE user.

NOTE This attribute has no effect on history logs that include the charge transactions. Reports that generate statistics based on information from the history logs, such as Transaction Statistics, will still count all charges, although in-house charges can be dropped from the counts by not including in-house user profiles when setting up the report.

Recirculate item

When an item is charged to a user, it may be possible to charge it again to another user without discharging it from the first user. This is only possible if the first user’s user profile permits recirculation.
Materials Booking Tab

Booking limit

This attribute indicates the number of items that can be booked at a time.

Delivery shipping

This attribute indicates the Delivery Shipping Schedule policy attached to this user. This schedule is used to record the amount of time required to ship the booked item from the library or media center to the user. This additional time needed for shipping is reserved on the item’s booking calendar. When an item is booked, the booking calendar displays the date that the item must be checked out and sent to the user to reach the user by the time it is needed. Symphony automatically calculates the amount of time.

Return shipping

This attribute indicates the Return Shipping Schedule policy attached to this user. This schedule is used to record the amount of time required to ship the booked item from the user back to the library or media center. When an item is charged and sent out, its return date contains the date that the item is expected back from the user. This date is automatically entered by Symphony, and includes the shipping time from the user after the last date needed.
Consecutive booking allowed

This attribute specifies whether users with this profile can book items in consecutive fixed time slots. This field corresponds to the fixed time slots field of the Booking Profile policy.

Login Attributes Tab

User access

If the system is configured to embed access fields as part of the User Profile policy instead of displaying them as fields in the user record, the user access field is included as part of the User Profile policy. The user access field contains one of the User Access policy names defined in the Access Control Configuration policies. The user access assigned to a user through the user profile defines the Symphony utilities, reports, command list, request list, and other functions that user can access.

Environment

If the system is configured to embed access fields as part of the User Profile policy instead of displaying them as fields in the user record, the environment field is included as part of the User Profile policy. The environment field contains one of the Environment policy names defined in the Access Control Configuration policies. The Environment policy defines a named set of windows, a gateway, and additional information that comprise the overall appearance and other configuration settings in the Symphony workstation.
Reserves Tab

Reserve charge limit
This attribute specifies the maximum number of items on academic reserve any user can have charged at one time. Unlike the overdue and bill thresholds, the user’s delinquency status is not affected when the reserve charge limit is reached. If the user reaches the reserve charge limit, only an operator override allows that user to check out additional items. Click the gadget, and type a number from 0 – 24,999, or choose UNLIMITED.

Reservation limit
This attribute specifies the maximum number of outstanding reservations a user may have at one time. Click the gadget, and type a number from 0 – 24,999, or choose UNLIMITED.

Eligible for reservation
This attribute determines whether a user may make advance reservations for reserve materials.

Consecutive reservation allowed
This attribute determines whether a user may place a reservation that begins immediately after her previous reservation ends.
**Miscellaneous Tab**

Routing rank  
This attribute specifies a number from 1-999 used to prioritize a user’s placement on a routing list.

Request limit  
This attribute specifies the maximum number of unanswered requests any user can have at one time. Click the gadget, and type a number from 0 – 24,999, or choose UNLIMITED.
User Category 1-5 Policies

User Category policies establish controlled vocabulary that describes an individual patron’s special characteristics for statistical analysis of circulation and registration. Use each category to track a series of different types of user characteristics.

Enter the User Category policies in the user record through the Demographics tab.
**User Address 1,2,3 Format Policy**

A Format policy is a list of entries allowed to be used by a given record, along with the characteristics of each entry. Format entry descriptions may be fully maintained by the Symphony Administrator. Entries may be added to and removed from Format policies, and the display labeling of any given entry may be modified.

**Entry IDs and Format Policies**

Entry IDs are the building blocks that define the Symphony fields and their characteristics in the various types of records used in Symphony. Format policies have two types of entry IDs: simple and synonym lists.
Simple Entry IDs

A simple entry ID identifies an entry that may be used in a specific type of format.

Entry ID Synonym List

Synonym lists define groups of entries for brief and full displays in each of the different formats.

Full entries

This attribute contains a synonym-list Entry ID policy that defines which fields display in a full record as well as the order of the displayed fields.

Brief entries

This attribute contains a synonym-list Entry ID policy that defines which fields display in a brief record as well as the order of the displayed fields.

Template entries

This attribute contains a synonym-list Entry ID policy that defines which empty fields display when creating or modifying specified purpose formats as well as the order of the displayed fields.
Customizing a User Address Synonym List — Delivered Entries

Notice reports use brief entries for user addresses. A brief User Address 1 Format Policy entry list might include the following simple Entry ID policies.

**STREET, LINE, CITY/STATE, ZIP**

![User Address 1 Policy]

The Symphony administrator can modify synonym list policies to configure an additional entry to display. For example, the Symphony administrator can add CARE/OF, a delivered entry, to the brief User Address 1 entry list so that it is printed on a user notice. In order for the CARE/OF entry to be populated at user registration, it should also be added to the template User Address 1 list.
To add a delivered entry to a synonym list

To add the CARE/OF field to the User Address 1 brief and template synonym lists, follow these steps:

1. On the User Configuration toolbar, click the User Address 1 Format Policy wizard.
2. Click the Entries tab.
3. Click the Entry ID helper.
4. Select the USERA1-BR Entry ID, and click Modify.
5. Click the Entries gadget to add CARE/OF to the list.
6. Select an entry in the List to choose from, and click the arrow to move it to the List selected.
7. Select CARE/OF in the List selected.
8. Click the Up or Down arrows to move the entry to the desired position in the list.
9. Click OK.
10. Click Save.
11. Repeat steps 4 through 11 using the Template entries.
12. Click Save when finished.
Entries List

This section displays a list of entries that are used with the Format policies. From this list, you can create, display, modify, or remove entry information. Selecting an entry and clicking Create, Display, or Modify displays the Basic and Display tabs.
Basic Tab for Address-Purpose Format Entries

**Entry ID**

This attribute contains the entry ID used with this Format policy. Entry IDs must be unique. Use the list to display a list of previously created entry IDs. If the entry ID does not exist, use the Entry ID helper to create a new one.

**Internal entry number**

This attribute contains the internal entry number used by the system. This number is relative only to the format and entry you are working with. Internal entry numbers must be unique, and can be between 1000 and 9999.

**Entry name**

This attribute contains a description for this Entry ID.

**Allow edit/create**

This attribute specifies whether the entry may be edited or created.
Required
This attribute is used to require that data be typed in an entry. The phrase **REQUIRED FIELD** is added to the text box of the entry if this attribute is selected.

Data type
This attribute is used to specify whether the data in this entry must be alphabetic, alphanumeric, numeric, printable, or whether the data may be any type of character.

Minimum size
This attribute is used to enforce a limit on the number of characters that can be typed in an entry. The smallest allowable value is zero; the largest allowable value is 9,999.

Maximum size
This attribute is used to enforce a limit on the number of characters that can be typed in an entry. The smallest allowable value is zero; the largest allowable value is 9,999.

Default value at creation
This attribute is used to specify default data that will appear in an entry when a record is created. The default data may be up to 200 characters.

Searchable flag
This attribute determines whether the entry is indexed for BRS searching.

Search ID
If the Searchable Flag is selected, then this attribute is activated. It works with the Searchable Flag and whether or not the entry is indexed. Refer to the WorkFlows Online help for a list of delivered Search ID’s.

Entry type
To indicate any special meanings or uses of this entry, entry types may be specified. This attribute is also used to determine if other Format policy attributes are used by an entry. For address-purpose formats, the following entry types are delivered:

- Email address
- Phone number
- Zip code
Display Tab for Address-purpose Format Entries

List of display variations
This section contains a list of display variations. This list contains the different labels that may appear for the entry.

Label
This attribute specifies the name of the label to use for this entry. This label may be modified, but if it is changed in the Format policy it appears exactly as typed regardless of the language being used in the workstation.

Send unformatted
This attribute indicates whether the data should be sent to the workstation formatted for display as well as unformatted. Unformatted data does not display, but is available for use by hypertext, WWW, and image file linking.
Customizing Synonym Lists by Creating New Entries

SirsiDynix delivers certain entries for each Format policy in Symphony. To customize entries for your library, your Symphony Administrator may need to create new entries. For example, you may need a PO Box field in the user address.

To create a new entry ID

1. On the User Configuration toolbar, click the User Address 1 Policy wizard.
2. Click the Entries tab.
3. Click Create.
4. Click the Entry ID helper.
5. Click Create.
6. Type POBOX in the Name field and P.O. Box in the Description field. Click Simple Entry ID, and click Save.
7. Select the Entry ID just created from the list.
8. Select the Allow edit/create check box.
9. In the Data type box, select ANY.
10. In the Minimum size box, type a value between zero and 9999.
11. In the Maximum size box, type a value between zero and 9999.
12. Leave the Default value at creation box blank.
13. Leave the Searchable Flag box blank.
14. Leave the Search ID box blank.
15. Leave the Entry type box blank.
16. Click the Display tab.
17. Type a Label.
18. Click Create, and then click Save.
19. Click Save again to close this wizard.
To display the new entry ID in a synonym list

Once you create an entry ID, add it to the appropriate synonym lists by modifying USERA1-BR, USERA1-FU, and/or USERA1-TEM:

1. On the User Configuration toolbar, click the User Address 1 Policy wizard.
2. Click the Entries tab.
3. Click the Entry ID helper.
4. Select the appropriate synonym list, and click Modify.
5. Click the Entries gadget.
6. Select the P.O. Box entry created in the previous example from the List to choose from, and click the arrow to move it to the List selected.
7. Select the P.O. Box entry in the List selected.
8. Click the Up or Down arrows to move the entry to the desired position in the list.
9. Click OK.
10. Click Save.
11. Click Save again.
User Configuration

User Standing Policy Wizard

The User Standing policy allows the creation of locally-defined custom user status policies for use in user records. It also allows the modification of the messages that display for the delivered User Standing policies of OK, DELINQUENT, BLOCKED and BARRED.

NOTE You may only change the Description and the Message attributes for the delivered User Standing policies (OK, DELINQUENT, BLOCKED, and BARRED). The Name, Delinquency Type, and Auto-replace attributes can not be modified. The delivered User Standing policies cannot be removed.
Name

Name uniquely identifies the policy. The Name should be 10 characters or less, and cannot include spaces or punctuation except [-] or [ _ ].

Description

This attribute provides more information about the policy and its use by the library. The description may be up to 60 characters in length.

Message

This specifies the message that will display when a circulation transaction causes the user’s status to be displayed or changed. The message may be up to 60 characters in length.

Delinquency Type

Each locally-defined user status has one of four delinquency types: OK, DELINQUENT, BLOCKED, or BARRED. The behavior of circulation transactions is determined by the delinquency type.

- OK – The user has full library privileges as defined in the policy file.
- DELINQUENT – The user has unpaid bills or overdue items. Delinquent users can still check out items and have all the other privileges of OK users, but the workstation operator will be warned that the user is delinquent.
- BLOCKED – The user has unpaid bills, accrued fines, and/or a number of overdue items that reach certain thresholds defined in the policy file. An override code is required to check out items to a blocked user.
- BARRED – The user cannot checkout items. A user cannot be automatically barred or unbarred. This status must be set or removed manually by a workstation operator with special privileges.
Auto-Replace

Indicates whether this custom user status should be replaced by delivered user statuses when a circulation transaction updates the user status.

- Always – If a user's status is changed manually to this custom user status, the custom user status will always be replaced with a delivered user status (when applicable) by a transaction or the report.

- Never – If a user's status is changed manually to this custom user status, the custom user status will never be replaced with a delivered user status by a transaction or the report.

- Raise Only – If a user's status is changed manually to this custom user status, the custom user status will only be replaced with a delivered user status by a transaction or the report if the projected delivered user status is higher (more restrictive) than the custom user status. If the projected delivered user status is equal to or lower (less restrictive) than the custom user status, the custom user status is not replaced.
User Group Responsibility Wizard

The User Group Responsibility policy is used to assign levels of responsibility to members in a group. This policy determines if group members share delinquencies and access to other group member's charges, holds and bills. This policy also determines if members can check out other members holds.

Name
This attribute uniquely identifies a specific User Group Responsibility policy. This name is ten characters or less, and may not include spaces or punctuation, except for dash (-), underscore (_).

Description
This attribute provides more information about the policy and its use by the library. The description may be up to 60 characters in length.
Responsibility Level
These attributes determine the level of responsibility for delinquencies.

- **Self** – The user is not affected by the delinquency of others in the linked group in which he or she may be included. However, the user would still be responsible for his or her own delinquencies.
- **Linked** – The user inherits delinquency status from the "worst-case" user who is included in the group.

Responsibility Type
The Responsibility Type attribute is used to indicate that transactions, such as checkouts, will be handled differently, or that special processing is needed.

- **Head** – Links cards together for checkout purposes only. All checkouts for the group would belong to the user with policy type of HEAD. For example, students could check items out for a professor but all charges would be linked to the professor's user record.
- **None** – No special type of processing is needed.

Access Level
This attribute controls a group member's access to other group member's records, such as charges, holds, or bills. The access level is not dependent on the level of responsibility.

- **Display Charges** – This option allows the user to see charges that belong to other members of the group.
- **Display Holds** – This option allows the user to see holds that belong to other members of the group.
- **Checkout Holds** – This option allows the user to checkout items on hold for other members of the group. When the item is checked out to a user that has this access, the hold record is considered filled.
- **Remove Holds** – Allows member of group to remove holds for other members.
- **Display Bills** – This option allows the user to see bills that belong to other members of the group.
- **Pay Bills** – This option allows the user to pay bills for other members of the group.
- **Allow Group Choice** – This option controls whether a prompt displays in the Checkout, Place Hold, and Bill User wizards to determine if the transaction (charge, hold or bill) is for the group or individual.
**User Extended Info Format Policy**

The User Extended Info Format policy controls the display, editing, and data validation of all extended information fields in Symphony user records.

![User Extended Info Format Policy](image)

**NOTE**

You should not have any entries in the Brief or Full entry lists that are not also in the Template, or you will not be able to create records that contain the entry missing from the Template. If you do not have all of the Template entries in the Full and Brief entry lists, they will not appear or print in reports.
General Configuration

Overview

The wizards on the General Configuration toolbar control policies used on all Symphony systems and policies used by more than one Symphony module.
Library Policy

Some uses of the Library policy are:

- Locate the library address to use for correspondence
- Specify a location for held items
- Determine the permissions of the display and modification of certain records

General Tab

Name

Name uniquely identifies the policy. The name should be 10 characters or less, and cannot include spaces or punctuation except (-) or (_).

Description

Description contains the full library’s name. The description can be up to 60 characters in length.
User ID

Each Library policy must have a corresponding user record in the Symphony database. The user ID of the library user should be the same as the Library policy name. The library name and address in the library’s user record display in notices to users. The user ID also identifies a user record to use for placing items in transit in multi-library systems. The user profile for this user record should be INTRANSIT.

NOTE
To include the library’s return address on notices, you must enter the address in the library’s user record. Additionally, for reports that produce separate lists for each library (i.e. List Onshelf Items with Holds and Clean Holds Shelf), the separate lists can be emailed to the email address(es) listed in the library’s user record.

OCLC Code

Use this attribute to indicate the library’s OCLC code. This attribute is used by the Extract Deletions for OCLC report. This report creates a file of the library’s deleted holdings that can be reported to OCLC.
Circulation Tab

Loan period: UNLIMITED

Accrue fines

Closed dates:

Closed days:
- Sunday
- Saturday

Hold location: HOLDS

Hold permissions libraries: ALL_LIBS

Hold group libraries: ALL_LIBS

Mail hold libraries: PUBLIC

Hold available item libs: ALL

Bill display libs: ALL_LIBS

Bill maintenance libs: ALL_LIBS

Circulation display libs: ALL_LIBS

Circulation libraries: ALL_LIBS

User display libs: GREENONLY

User maintenance libs: ALL_LIBS

Library hour maintenance libraries: ALL_LIBS

Patron credit maintenance libs: PUBLIC

Mailing center library: MAIN

Mailing center location: INSHIPPING

Days for holds to expire: 365

Days for avail holds to expire: 7

Save  Cancel
Loan period

Use the loan period attribute in conjunction with library precedence (in the User Profile policy) to define a specific date for the loan period. Defining a specific date for the loan period and selecting the library precedence check box in the User Profile policy, shortens the due date for all items checked out if the policy due date exceeds the date in the library’s loan period.

For example, the loan period in the library policy is 6/10/2005. A patron from this library checks out an item on 5/31/2005 with a 14-day loan period. By policy, the due date would be 6/14/2005, but because this date exceeds the date in the library loan period attribute, it shortens the due date to 6/10/2005.

Accrue fine

Select this check box to allow fines to accrue on closed days and dates.

Closed dates

This attribute contains a list of the dates the library is closed. No due date ever falls on a day the library is closed. If a due date would normally fall on a closed day, it is moved forward to the first open day.

Click the gadget to select the dates when the library is closed. You can select up to 64 closed dates. Ranges of dates, such as December 24-25, can be used as one closed date.

Closed days

This section of the Library policy sets the regular operating schedule for each library based on the days of the week that the library is open. You can select each day of the week, Sunday through Saturday as closed. No due date ever falls on a day of the week that the library is closed. If a due date would normally fall on a closed day, it is moved forward to the first open day.

Closed dates in list onshelf hold report

This attribute determines whether closed dates should be considered when libraries are selected for inclusion in the List Onshelf Items with Holds report.
Hold location

This attribute contains one of the Location policy names defined in the General Configuration policies. When a patron wants an item that is currently checked out to another user, the library can place a hold on the item. When the user returns the requested item, it is routed to a named holds location to wait to be picked up by the requesting user. For each library, Symphony must know the correct holds location name.

Hold permissions libraries

This attribute, used by both Demand Management and Conventional Holds, defines which library’s station operators are generally allowed to place holds on its materials. Select a group of libraries defined in the Library Group policy.

Hold Group Libraries

The Hold Group Libraries attribute, used only by Demand Management, defines which libraries station operators are considered to be in a "virtual" group with the library regarding holds. Groups are defined in the Library Group wizard. Select library groups from the list.

NOTE

Because a library’s Hold Group Libraries configuration defines both the libraries that its station operators belong to (for placing Group range holds), and the group of libraries that its items are associated with (for the hold map "my group only" permission and "my group first" priority), hold groups should generally be created with a reciprocal relationship between libraries. For instance, if Library A is in Library B’s group, then Library B should be in Library A’s group.

Hold available item libs

If your system is configured to use Symphony’s Demand Management feature, this attribute controls which library’s station users can place holds on this library’s available items (items already available on the shelf). This attribute does not use the Library Group policy feature.
Bill display libs

In a multi-library system, each Library policy specifies the libraries your library staff can access for displaying user bill information. This attribute determines whether your staff will have access to either a select group of libraries or all libraries. Define groups in the Library Group policy. Symphony delivers a group named ALL_LIBS that includes all libraries on the system.

Bill maintenance libs

In a multi-library system, each Library policy specifies the libraries your library staff can access for creating or paying user bills. This attribute determines whether your staff will have access to a select group of libraries or all libraries. This can be useful for multi-library consortia sharing a single Symphony system.

Circulation display libs

This attribute determines whether your library staff can display circulation information for a select group of libraries.

Circulation libraries

In a multi-library system, each Library policy specifies the libraries your library staff can access for modifying circulation information. This attribute determines whether your staff will have access to a select group of libraries or all libraries. This can be useful for multi-library consortia sharing a single Symphony system.

Mail Hold Libraries

The Mail Hold Libraries attribute, used only by Books by Mail, defines the mail hold libraries and includes a list of libraries from which items are pulled to fill holds that are set to be mailed.

Mailing Center Library

The Mailing Center Library attribute is available if the system is configured for Books by Mail and specifies the library from which Books by Mail items are processed and shipped. This attribute is referenced if, in the hold record, Mail Item to User is selected and the Delivery Method is identified. The Mailing Center Library list does not include an empty library or ALL_LIBS options.

Mailing Center Location

The Mailing Center Location attribute is available if the system is configured for Books by Mail. When a hold is made available, the item's mailing center library location is used for the item's current location.
User display libs

In a multi-library system, each Library policy specifies the libraries your library staff can access for displaying user information. This attribute determines whether your staff will have access to a select group or all libraries.

User maintenance libs

In a multi-library system, each Library policy specifies the libraries your library staff can access to modify user information. This attribute determines whether your staff will have access to a select group or all libraries. This can be useful for multi-library consortia sharing a single Symphony system.

Days for Holds to Expire

The Days for Holds to Expire attribute sets a default number of days for holds to expire (the number of days the system will attempt to fill a hold). When a user places a hold, the hold expiration date equals the number of days from this attribute plus the current date. If the user sets a hold expiration date when placing the hold, it will override the default hold expiration value in the Library policy.

Example The Days for Holds to Expire value is 365. If a user places a hold on 7/29/2005, the hold expiration date will be 7/29/2006.

Days for Avail Holds to Expire

This attribute specifies the number of days an item can be on the Hold shelf before the Expire Available Holds report marks it "Hold Expired While On Shelf" (EXP_ONSHLF). Type a number of days, or type NEVER. If NEVER is used, the item will remain on the Holds shelf until the hold expiration date, the default hold expiration date, or until it is manually removed by library staff. If this attribute is selected the resulting notice will include "Pickup by ______".
Cataloging Tab

Text index name

The text index name is a label (up to four characters) that identifies the database index files for the Symphony database.

![Warning symbol]

**CAUTION** Do not attempt to modify this policy attribute unless instructed by Client Care. The text index name must be obtained from Client Care.

As delivered, all Library policies use the UNI (Union) Keyword Index policy, allowing you to search all libraries as well as restrict searches to a given library without having to build a separate index for the library.

This attribute does not display in UnicornECOLE systems.

**NUC symbol**

This attribute specifies the National Union Catalog symbol of the library. The NUC symbol is written into the 852 subfield a when MARC holdings records are output.

This attribute does not display in UnicornECOLE systems.
Cataloging display libs

In a multi-library system, each Library policy specifies the libraries your library staff can access for displaying catalog records. This attribute determines whether your staff will have access to a select group or all libraries.

Cataloging maintenance libs

In a multilibrary system, each Library policy specifies the libraries your library staff can access for creating and maintaining cataloging information. This attribute determines whether your staff will have access to a select group of libraries or all libraries. This can be useful for multi-library consortia sharing a single Symphony system.

Call Number Maintenance Libraries

The Call Number Maintenance Libraries attribute determines whether your staff will be able to modify call number records for a select group of libraries or all libraries. Maintenance checks have been added to cataloging wizards to allow or prevent modifying call number information. Groups are defined in the Library Group policy. A group named ALL_LIBS is delivered with Symphony and includes all libraries on the system. Select libraries from the drop-down list. Use the Library Group Policy helper to create new library groups or modify existing groups, if needed.

Item Maintenance Libraries

The Item Maintenance Libraries attribute determines whether your staff will be able to modify item records for a select group of libraries or all libraries. Maintenance checks have been added to cataloging wizards to allow or prevent modifying item information. Groups are defined in the Library Group policy. A group named ALL_LIBS is delivered with Symphony and includes all libraries on the system. Select libraries from the drop-down list. Use the Library Group Policy helper to create new library groups or modify existing groups, if needed.
NOTE

If you plan to use the floating item processing feature, you should take care in making selections for the Call Number Maintenance and Item Maintenance Libraries attributes. For example, if the Few Library checks in and assumes ownership of an Arrowood Library item, the item now belongs to a Few call number. If Few does not have access to Arrowood’s call numbers, the empty Arrowood call number cannot be deleted. If Few had access to Arrowood’s call numbers, the empty Arrowood call number would be removed automatically.

MARC Holdings Maintenance Libraries

The MARC Holdings Maintenance Libraries attribute determines whether your staff will be able to modify MARC holdings records for a select group of libraries or all libraries. Maintenance checks have been added to cataloging wizards to allow or prevent modifying MARC holdings information. Groups are defined in the Library Group policy. A group named ALL_LIBS is delivered with Symphony and includes all libraries on the system. Select libraries from the drop-down list. Use the Library Group Policy helper to create new library groups or modify existing groups, if needed.
Acquisition Tab

**Acquisition display libs**

This attribute determines whether all or specific libraries can view certain acquisitions information associated with this Library policy. If the field is blank, all libraries can display your acquisitions information. If you select a list, only those libraries listed can display your acquisitions information. If you select **No Access**, then no libraries can modify the acquisitions information.

**Acquisition maintenance libs**

This attribute determines whether all or specific libraries can modify certain acquisitions information associated with this Library policy. If the field is blank, all libraries can modify the acquisitions information. If you select a list, only those libraries listed can modify the acquisitions information. If you select **No Access**, then no libraries can modify the acquisitions information.

**Standard address number**

The Standard address number is a unique seven-digit identifier used to signify a specific address of an organization in (or served by) the publishing industry. This attribute is used to support EDI transactions. For more information go to http://www.isbn.org.
Serial Control Tab

Serial display libs

Each Library policy specifies whether users associated with that library can view serial control information for other libraries in a multi-library system. If the field is blank, all libraries are permitted to display this library’s serials information. If a list is selected, only those libraries listed can display this information. If you select No Access, then no libraries can display the serials information.

Serial maintenance libs

Each Library policy specifies whether users associated with that library can modify serial control information for other libraries in a multi-library system. This attribute controls whether certain serials information can be modified by users associated with a specified library. If the field is blank, all libraries are permitted to modify this serials information. If a list is selected, only those libraries listed can modify this serials information. If you select No Access, then no libraries can modify this library’s serials information.
Open URL Resolver Tab

The attribute stores the base URL for the WorkFlows Open URL Resolver used by the ERMS wizard in the Serials and Acquisitions modules. This URL can vary by library and has a maximum field length of 256 characters. If your library did not purchase this option, this tab will not display.
Modify a Library Policy

It is important to annually review the **Closed Dates** information in each Library policy, remove past dates, and input the closed dates for the upcoming year. Keeping this information current ensures item due dates will not fall on dates the library is closed.

To update the Closed Dates information to reflect a new year

1. On the **General Configuration** toolbar, click the **Library Policy** wizard. The List Policies window appears.
2. Select the Library policy to modify. You can only modify one library at a time. Single library systems will only have one library listed.
3. Click **Modify**.
4. Click the Circulation tab.
5. Click the **Closed dates** gadget to remove or add dates. The following window appears:
6. Select a date to remove in the Closed Dates list, and click Remove. Dates must be removed one at a time.

7. To add closed dates, select the closed date, or the first date closed in a series on the Closed from calendar. Select the last closed date on the Until calendar. If the library is closed for one day, select the same date on both calendars. Click Add.

8. When you are finished adding dates, click OK.

9. Click Save. The policy changes will take effect after you halt and run the Symphony servers.

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**NOTE** Refer to the Library Calendar wizard under the General Configuration if you wish to allow others to set the closed dates without allowing access to the whole library policy.
Location Policy

A Location policy is a name describing the geographic location, a collection, or conceptual location of a physical object owned by the library.

Each item has a home location and a current location. The item is at its home location whenever it is not charged. The current location always reflects where the item is now, charged or not.

Location Policy Attributes

Name

Name uniquely identifies a specific Location policy. Must be 10 characters or less, and cannot include spaces or punctuation except (-) or (_).

Description

This attribute provides additional information about the policy and its use by the library. The description can be up to 60 characters in length.
Holdable

Use this attribute to allow or prevent placing holds against items with this current location. When Holdable is selected for a location like CHECKEDOUT, an item with that current location can have holds placed against it. When the Holdable check box is cleared for a location like STACKS, an attempt to place a hold on any item with that current location is blocked. Staff can override this block.

NOTE
SirsiDynix recommends that the circulation map and hold map be the primary limiters of whether an item is holdable. For more information, see the WorkFlows Online Help.

Type

This attribute identifies the type of location assigned to a user, or the type of current location assigned to an item. Symphony accords special treatment to items checked out to a user with that special location or special treatment to items with that location.

Use the list to select a type of location. You can assign the following types to locations:

ASSUMED_LOST – Used for long overdue items. The Assumed Lost report identifies items that are long overdue and assigns them to the location that has the ASSUMED_LOST location type. The LOST-ASSUM location is delivered.

CLAIMS_LOST – Used for items that patrons claim are lost. Use the Mark Item Lost wizard to identify the claimed lost item and assign the item to the location that has the CLAIMSLOST location type. The LOST-CLAIM location is delivered.

DESTROY – Only used with the Accountability module. Any item assigned a Location policy with location type DESTROY has a linked item accountability record. DESTROY indicates the material has been tagged to be destroyed by the date entered in the item accountability record’s pending destruction date. When the destruction date is reached Symphony automatically updates that record’s location to the Location policy DESTROYED. All customers with the Accountability module must have at least one DESTROY Location policy type.
DESTROYED – Only used with the Accountability module. Any item assigned a location with type DESTROYED has a linked item accountability record. The location type DESTROYED indicates that the item has been physically destroyed but the bibliographic information is still in the database. Symphony automatically updates the destruction date field of that record.

NONE – Identifies Location policies with no special location type. STACKS, CHECKEDOUT, HOLDS, ON-ORDER, INPROCESS, MISSING, and REFERENCE are all examples of Location policies that need no special treatment by Symphony and should have location type NONE.

RESERVE – Must be assigned to all reserve user locations. This location type allows copies at the owning library to be charged to a reserve desk at another library.

RESHELVING – Indicates that this location represents a temporary holding area where items are kept after being discharged but before being reshelved. When a Location policy contains a location of RESHELVING and an item is discharged, the reshelving location displays instead of the item’s current location. After the time specified in the reshelving period has passed, the item’s current location displays instead of the reshelving location.

Example – Reshelving Location

A library has created the STACKS and RESHELVING Location policies, with the following reshelving attributes.

Name – STACKS
Reshelving period - OVERNIGHT
Reshelving location - RESHELVING

Name – RESHELVING
Reshelving period - RESHELVE
Reshelving location - RESHELVING

When an item with the home location STACKS is discharged, the location RESHELVING displays instead of the current location in WorkFlows and the catalog. After the reshelving period has passed (OVERNIGHT), the current location of the discharged item (STACKS) then displays.

TRANSIT – Marks an item in transit from one branch to another branch in the same system. The Location policies INTRANSIT or ENROUTE should be assigned the TRANSIT type. Use this location type in multi-library systems only.

UNUSED – Assigned to inactive location types.
Shadow

Prevents or allows public workstations to search and display certain items with this current location. When Shadow is selected for a location like LOST-PAID, any item with that current location can only be searched and displayed at staff workstations. When the shadow check box is cleared for a location like STACKS, any item with that current location can be searched and displayed at either public or staff workstations.

NOTE A location's shadow attribute cannot be changed after the location name is created in policies.

Reshelving period

Reshelving period specifies how long the reshelving location should be used when displaying items. After the reshelving period has passed, the discharged item’s current location is used when displaying items.

Reshelving location

The reshelving location attribute is another Location policy that describes an area where an item is kept while awaiting reshelving. If an item’s current location is a Location policy with a reshelving-type reshelving location attribute, the date and time the item was last discharged is compared against the reshelving period attribute of the Location policy. If the item was last discharged during the reshelving period, the reshelving location is displayed instead of the current location when displaying items.

If you attempt to edit the item record during the reshelving period, the reshelving location does not display. The item's true current location displays.

Current locations and special locations, such as CHECKEDOUT, BINDERY, LOST, and LONGOVRDUE, should not have reshelving “turned on.” Their reshelving location attributes should contain their own policy names, such as CHECKEDOUT for the CHECKEDOUT Location policy and BINDERY for the BINDERY policy.

If your library does not allow onshelf items and there is an item on the shelf in an available location, a hold will not be allowed because of the onshelf available item. If the location is considered unavailable, then a hold can be placed successfully.
Available

Demand Management uses the Available attribute when it performs its checks for placing a hold. If your library does not allow holds for onshelf, available items, you can use the Available attribute to prevent items in one or more locations from being considered as "available" when a hold is placed. Click Yes to make this Location policy available, or click No to make this Location policy unavailable.

If your library does not allow onshelf items and there is an item on the shelf in an available location, a hold will not be allowed because of the onshelf available item. If the location is considered unavailable, then a hold can be placed successfully.

Example:

If your library owns three copies of a title and two of the copies are in the STACKS location but both are checked out. The other copy is in the DISPLAY location and on the shelf. If the DISPLAY location is available, the hold will not be placed because there is a copy on the shelf and available. If the DISPLAY location is unavailable, when a patron tries to place a hold, the hold gets placed successfully because the other two available copies are checked out.
To create a new location

1. On the General Configuration toolbar, click the Location Policy wizard. The following window appears:

2. Click Create. The following window appears:
3. In the Name box, type a name for the new policy using 10 characters or less, for example, CHILDRENS.

4. In the Description box, type a description using less than 60 characters for the new policy, for example, Childern’s Collection, 2nd Floor.

5. Select the Holdable check box so that material in the new current location can have holds placed.

6. In the Type list, click NONE to indicate that Symphony needs no special attention for the new location policy.

7. Leave the Shadow check box cleared, so items in the new location will not be shadowed and will be visible to the public.

8. Use the lists to select a Reshelving Period and Reshelving Location, so those items shelved in the computer room do not automatically read as shelved when discharged. For more information, see the WorkFlows Online Help.

9. Click Save. The policy changes will take effect after you halt and run the Symphony servers.
Search Library Policy

In multi-library or consortia systems, the Search Library policy is used to group libraries so that you can search a “neighborhood of libraries” simultaneously. If the library chooses to implement this functionality, patrons searching iBistro/iLink and staff members searching in Workflows can select one of the Search Library group names from the Library list field.

If a search limited by a library or library group fails to retrieve items, patrons can modify the search to point to another library, another group of libraries, or all libraries.
Library Group Policy


The Library Group policy provides a list of valid Library Group policy names to use when creating groups. Select libraries using the list provided. If blank, no libraries will be selected.

The group ALL_LIBS is a delivered value and contains all libraries on the system.

NOTE A library can belong to more than one group; however, only one group can be selected in the maintenance and display fields of the Library policy.

Honor Order of Libraries in Group for Holds

If your system is configured to use the Order Hold Fill policy, this check box is visible. If you select this option, the List Onshelf Items with Holds report will honor the order of libraries listed in the Library Group policy defined in the Ordered Hold Fill policy when selecting items to fill holds. This lets you set up specific transit/delivery routes for hold filling.
Overview

The Circulation module manages user records, item records, charge records, hold records, and bill records. These records work together to perform a variety of circulation functions. Circulation policies are the parameters that ensure that a library charges out material to properly registered users and correctly receives and processes returned material.

The Circulation Configuration toolbar contains the following wizards:
**Item Type Policy**

The Item Type policy’s main purpose is to identify circulation characteristics of an object. Through the Symphony policies, the library defines things such as the loan period and fines for a particular item type. You can also use the Item Type policy to indicate special characteristics of an object for statistical analysis. The library establishes what terms identify material types in policies. Item types identify the kind of material housed in each of the permanent home locations. Identification of item types can be general or specific.

**Item Type Policy Attributes**

![Item Type Attributes](image)

**Name**

This attribute uniquely identifies a specific material type of an object. The item type name associates an item with a billing structure and a loan period through the Circulation Rule policy. The name must be 1-10 characters.

**Description**

This attribute provides more information about the policy and its use by the library.
Hold threshold

If this item type may be circulated, the number of holds may be specified at which an alternate loan period will be used. If the number of holds on an item exceeds the hold threshold for that item type, the alternate loan period from the circulation rule is used instead of the loan period. Typically, this attribute is used to shorten the loan period of high-demand items. The hold threshold is a number from 1-25,000; the default value is 25,000.

Booking profile

This attribute identifies each item type’s interaction with the Materials Booking module. This attribute contains a valid Booking Profile policy for item types that may be booked, or is set to NONE for items that may not be booked.

Floating

This attribute allows you to indicate whether you want items of this type to be included in a "Floating Collection." If an item is assigned an Item Type policy with the floating check box selected, the act of discharging the item at a different library will not put the item in transit to its original, owning library, but rather, the system will change the owning library of the item to the discharging library.

NOTE For the floating item processing to work, the Global Configuration policy “Automatic Transit Of Items For Circulation” must be set to automatically transit items.
To create a new Item Type policy for a DVD

1. On the Circulation Configuration toolbar, click the Item Type Policy wizard. The following window appears:

2. Click Create. The following window appears:
3. In the **Name** box, type **DVD**.

4. In the **Description** box, type **Videodiscs**.

5. The **Hold threshold** defaults to 25000. If you would like loan periods to be shortened when DVD’s are in high demand you can decrease this number.

6. Leave the **Booking profile** box blank, because the Materials Booking module is not used.

7. Select the **Floating** check box if you want to include DVDs in a floating collection.

8. Click **Save**. The policy changes will take effect after you halt and run the Symphony servers.
Bill Reason Policy

Staff members can bill users from a workstation, or Symphony can bill automatically (for example, when discharging an overdue item). A bill reason is recorded with the bill each time a user is billed. Recording the reason for a bill can prove useful to both staff and system administrator; staff members can tell a patron the reason for the bill, and the system administrator can use bill reports to analyze certain activities, such as the various sources of circulation revenue.

Bill Reason Policy Attributes

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Associated with item</th>
<th>Tax rate</th>
<th>Tax base currency</th>
</tr>
</thead>
</table>

Name
This attribute uniquely identifies a specific Bill Reason policy. This field accepts 1-10 characters.

Description
This attribute provides more information about the policy and its use by the library.

Associated with item
Each Bill Reason policy contains an indication of whether the bill pertains to an item. If a library staff member, in billing a user, selects a bill reason that indicates an item is associated with that bill, the staff member is required to supply the item ID. Similarly, when the system automatically bills a user, for a bill reason with an associated item, it records the item ID with the bill (for example, when discharging an overdue item).
Tax rate
This attribute is used for calculating the tax on bill amounts. The tax rate is a percentage value, and can be expressed to the hundredths of a percentage point. For example, to define a tax rate of 8%, type 800 in the tax rate box. To define an 8.75% tax rate, type 875.

NOTE You may easily define non-taxable bill reasons by setting the tax rate to 0% (type 0).

Tax base currency
This attribute defines the smallest monetary unit available in the local currency. The tax base currency is used to prevent a tax value from being calculated smaller than the specified unit. For example, the tax base in the United States is 1 since the smallest monetary unit is one cent.

To create a new Bill Reason policy
The library purchased a fax machine and will charge patrons $.50 per page to fax material. Create a new bill reason to bill patrons for this service.

1. On the Circulation Configuration toolbar, click the Bill Reason Policy wizard. The following window appears:
2. Click **Create**. The following window appears:

3. In the **Name** box, type **FAX**.

4. In the **Description** box, type **Fax Machine Use**.

5. Leave the **Associated with item** check box cleared, because this bill will not be linked to an item in the collection (unlike an overdue bill).

6. Leave the **tax rate** and **tax base currency** boxes blank.

7. Click **Save**. The policy changes will take effect after you halt and run the Symphony servers.
Billing Structure Policy

When Symphony performs automatic billing, the base fee used to calculate the bill comes from a Billing Structure policy. Billing Structure policies determine what fines (if any) are associated with a circulation transaction. A billing structure is associated with a combination of User Profile and Item Type policies through the Circulation Rule and Circulation Map policies. You can define any number of billing structure policies.

A Billing Structure policy is an attribute of the Circulation Rule policy, which in turn is an attribute of the Circulation Map policy. With any circulation transaction, Symphony examines the Circulation Map policy to determine which circulation rule to use for this combination of user profile, item type, and library.
Billing Structure Policy Attributes

Name
This attribute uniquely identifies a specific Billing Structure policy. This field accepts 1-10 characters.

Description
This attribute provides more information about the policy and its use by the library.

Maximum Fee
This fee indicates the largest amount that may be billed for an overdue/recalled item.
Overdue Checkouts

This section determines whether this billing structure will be used to bill a user or suspend a user's privilege. You must select either Bill or Privilege suspension.

Bill

Select this option if your library bills users for their overdue items. Choosing this option displays the following attributes:

- Flat overdue fee structure

To define a flat overdue fee structure, type a monetary amount between 0.00 and 9,999,999.99 in the Accrue box. Fees can be accrued by the Hour, Day, Week, or Month; select one.

For example, to define a flat overdue fee structure where the patron is fined $0.10 per day, create a structure to accrue $0.10 every day. If a patron has an item three days overdue, the overdue fee will be $0.30.
Graduated overdue fee structure

To define a graduated overdue fee structure, type a monetary amount between 0.00 and 9,999,999.99 in the first Accrue box. Set the fine to accrue by the hour, day, week, or month. Type a value between 0 and 999 in the Number of periods at this rate box. Type a monetary amount in the second Accrue box, select an increment, and if this is the last rule, select Use this rate until maximum fee is reached. Otherwise, use the Insert Row After or Insert Row Before helpers to add more rows.

For example, define a graduated overdue fee structure where the patron is fined $1.00 per week for the first two weeks, then $0.50 per day thereafter. In the first row, type $1.00, select Week, and type 2 in the Number of periods at this rate box. In the second row, type $0.50, select Day, and select Use this rate until maximum fee is reached.

It is possible to define an overdue fee of $0.00 for a limited period. You may want to do this in order to provide a "no fine" period at the beginning of an overdue period.

NOTE  This is not the same as a grace period. At the end of the grace period, the grace period days are included in the accrual of the overdue fee. If the graduated overdue fee is defined as $0.00 per day for the first three days, and then $0.10 per day thereafter, the first three days are never fined. In addition, days the library is closed are skipped when a graduated overdue fee is set to $0.00 for the first three days; grace periods do not skip closed days.

Privilege suspension

Some libraries prefer to suspend a user’s privilege for overdue items rather than bill the user. Choosing this option displays the following attributes:
User suspended for

This attribute calculates how long a user's privilege is suspended. A user's privilege can be suspended for days, weeks, or months.

Maximum Suspension Amount

This attribute defines the maximum number of times a user's privilege can be suspended. If a user's Maximum Suspension (defined in the User Profile policy) is less than the Maximum Suspension defined in the Billing Structure, the suspension will be reduced to the maximum defined in the user's profile.

Example -- The Maximum Suspension for overdue books is 30 days. ADULT and JUVENILE users will have their privileges suspended for up to 30 days for overdue books, since the ADULT and JUVENILE user profiles have a Maximum Suspension of 30 days. However, the Maximum Suspension for the LIBSTAFF users is 14 days. If a LIBSTAFF user has overdue books, her privilege can be suspended for up to 14 days.

Overdue Recall Billing

Recall fees accrue from the end of the recall loan period. If no recall loan period is defined, the recall fees accrue from the date the item was recalled. Recall fees may or may not be in addition to overdue fees, depending on whether the item is overdue when returned. Recall fees may be applied by the hour, day, week, or month.

NOTE  Graduated fee rules are not supported for recall fees.

Transaction Fee Billing

Hold fee

This fee is the bill amount when an item is charged to a user who has requested a hold for the item. A hold fee might be appropriate to cover the handling and postage involved in notifying the user that the held item is now available and waiting at the library.

Fee for checking out an item

This attribute is the bill amount when an item is charged or renewed, if a user should be billed on a per charge basis.
To create a new Billing Structure policy

The library board decided that the overdue fine for DVDs will be $1.00 per day.

1. On the Circulation Configuration toolbar, click the Billing Structure Policy wizard. The following window appears:

2. Click Create. The following window appears:
3. In the Name box, type DVD.
4. In the Description box, type Overdue fines for DVDs.
5. Type a Maximum fee of $25.00 if you want the fine to stop accruing once it reaches that level.
6. Click Bill.
7. Click Flat overdue fee structure.
8. In the Accrue box, type $1.00.
9. Click Day.
10. Leave the Overdue Recall Billing and Transaction Fee Billing sections blank.
11. Click Save. The policy changes will take effect after you halt and run the Symphony servers.
The Billing Structure is just one policy used in Circulation. We will build a diagram to explain the relationship of these policies.

**Billing Structure**

Fine is $1.00 per day
Loan Period Policy

A Loan Period policy is a formula Symphony uses to calculate the due date for a charged item. Loan periods are associated with user profiles and item types through the Circulation Map policies.

Loan Period Policy Attributes

- **Name**: This attribute uniquely identifies a specific Loan Period policy.
- **Description**: This attribute provides more information about the policy and its use by the library.
Period type

The attribute indicates which formula is used to calculate the due date when using this loan period. There are six formula types.

**Hourly** – The due date is a certain number of hours from the check out time.

**Daily** – The due date is a certain number of days from the checkout date. This includes a time due.

**Weekly** – The due date is on a specified weekday a certain number of weeks from the checkout date (for example, three weeks from the next Monday). This includes a time due.

**Date List** – The due date is chosen from a list of supplied dates. This includes a time due.

**Indefinite** – There is no date due calculated.

**Minutes** – The due date is a certain number of minutes from the check out time.

Period count

This field has different meanings for the different types of loan periods. For hourly loan periods, it is the number of hours that an item is loaned. For daily loan periods, it is the number of days that an item is loaned. For weekly loan periods, it is the number of weeks that an item is loaned. For minutes loan periods, it is the number of minutes that an item is loaned.

Day in week

If the type of loan period measured is weekly, a day of the week, Sunday through Saturday, must be selected. This is the day of the week that the item being charged is due.

Time due

For the loan period types other than hourly and minutes, this is the latest time the item may be returned on the due date and not be overdue. Normally, this time is set to one minute before midnight (11:59 PM is recorded as 23:59), so that the item would not be overdue until the day after the due date.

Due dates

This attribute allows a specific due date to be assigned.
To create a new Loan Period policy

You must create a Loan Period policy to be used with your new item type of DVD.

1. On the Circulation Configuration toolbar, click the Loan Period Policy wizard. The following window appears:

2. Click Create. The following window appears:
3. In the Name box, type **10 DAY** for the loan period name.

4. In the Description box, type **Circulates for 10 days**.

5. Select a Period type of **Daily**, because the due date is a certain number of days from the checkout date.

6. In the Period count box, type **10** for the number of loan days.

7. In the Time due box, type **23:59** so that the item is not overdue until after midnight, the day after the due date.

8. Leave the Due dates field blank since items using this loan period should not all be due on the same date.

9. Click **Save**. The policy change will take effect after you halt and run the Symphony servers.
Elements of a Circulation Rule build parameters for all Circulation transactions.

<table>
<thead>
<tr>
<th>Loan Period</th>
<th>Billing Structure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Circulates for 10 days</td>
<td>Fine is $1.00 per day</td>
</tr>
</tbody>
</table>
Circulation Rule Policy

Libraries define circulation characteristics through Circulation Rule policies. These rules combine with user profiles and item types in the Circulation Map policy to cover all possible circulation transactions.

Circulation Rule Policy Attributes

Name
This attribute uniquely identifies a specific Circulation Rule policy.
Description

This attribute provides additional information about the policy and its use by the library.

Loan period

This attribute contains a Load Period policy value. Each Loan Period policy is simply a formula by which Symphony can calculate the due date when an item is charged.

Billing structure

This attribute contains a Billing Structure policy value. Each Billing Structure policy is simply a formula by which Symphony can calculate a bill (or privilege suspension) based on the per day, hour, week, or month overdue, hold, privilege, and recall fees for an item.

Renew limit

This attribute controls how many times a user (with a particular user profile) can renew a particular item (with a particular item type).

Chargeable

This attribute indicates whether this circulation rule allows a user to check out an item.

Maximum charges

This attribute is used to impose limitations on item types or to define branch borrowing limits for consortia or multi-library systems. A number between 0 and 25,000 may be specified to set a limit on the number of times an item of this type may be charged to a user (or the number of times a library's items may be charged to a user). Every time an item is charged to a user, Symphony checks the circulation rule for a limit, and if there is a limit, an internal counter of a user's charges by library and item type is incremented. With every new charge, the internal counts are examined, and if an item type has been checked out more times than allowed (or if the count of charges allowed to a specified library is exceeded), the new charge will be blocked.

Grace periods are in

This grace period type attribute defines whether grace periods (periods in which no overdue or recall fines are charged) are measured in days, hours, or minutes.
**Grace periods**

The grace period is a number between 0-24,999 that defines the number of minutes, hours, or days (depending on the grace period type) in which a user may return an overdue item without incurring a fine. If the user returns the item after the grace period is over, the full overdue fine is charged.

**Example** – An item is due on June 1. The circulation rule applied when the item was charged specified an overdue grace period of three days and a daily overdue fine of ten cents. If the item is discharged on June 2-4, no overdue fine is applied. If the item is discharged on June 5, the overdue fine is calculated from the due date and is calculated as 40 cents.

**Recall grace period**

The recall grace period attribute includes a number between 0-24,999 that defines the number of minutes, hours, or days (depending on the grace period type) in which a user may return a recalled item without incurring a fine. Recall fines start accruing after the recall due period expires. This allows time for the recall notice to reach the user, without penalty to the user.

**Overridable**

This attribute specifies whether a block on a charge can be overridden so a user can check out the item. This is only necessary for Circulation Rule policies in which the chargeable check box is cleared.

**Example** – Delivered rule: NONCIRC-Y

Does not normally circulate, but can be overridden, i.e., Reference Books.

Other delivered rule: NONCIRC-N

Does not circulate under any circumstances, e.g., Rare Books.
Recall loan period

This attribute contains a Loan Period policy value. The recall loan period defines the amount of time that must have elapsed since the item was charged before a recall notice can be generated for a standard recall.

Example – An item was charged on June 1 and a standard recall was created on June 6. The recall loan period specified in the circulation rule for the charge transaction on June 1 was one week. When the Recall Notice on Charged Items report runs, no recall notice is generated until the user has had the item for one week. At that point, the standard recall is changed to a rush recall and the notice is generated.

Alternate loan period

If the number of holds on an item being charged exceeds the hold threshold on its Item Type policy, the alternate loan period is used instead of the loan period attribute to calculate the due date. Like the loan period attribute, the alternate loan period is also a valid loan period policy, typically of shorter duration than the usual loan period, so that high-demand items may be circulated for a shorter length of time.

Save Charge History

Select this check box to save the charge history for items circulated using this circulation rule. Click to clear this check box if you do not want the charge history to be saved. By default, this check box is cleared. This option will only display if your system is configured to save Charge History.

NOTE

To implement the Charge History feature, you will need to add the Circulation Rule policies (with the Save Charge History attribute selected) to your circulation maps, affecting those items/users for which you want to track charge histories. Contact SirsiDynix Client Care if you wish to have your system configured to save Charge History.
To create a new circulation rule

Create a new circulation rule for DVDs that circulate for 10 days and accrue $1.00 a day when overdue.

1. On the Circulation Configuration toolbar, click the Circulation Rule Policy wizard. The following window appears:

![Circulation Rule Policy: List Policies](image)

2. Click Create. The following window appears:

3. In the Name box, type DVD10DAY.

4. In the Description box, type DVD/Circulates for 10 days/1 dollar per day.

5. Use the Loan period list to select the 10DAY Loan Period Policy, or use the Loan Period helper to create a new policy.

6. Use the Billing structure list to select the DVD Billing Structure Policy or use the Billing Structure helper to create a new one.
7. In the **Renew limit** box, type 2 so items can be renewed twice.

8. Select **Chargeable**.

9. In the **Maximum charges** box, type 4.

10. Leave the **Grace periods** and **Recall grace period** fields blank.

11. No value is necessary for the **Overridable** attribute since you selected the Chargeable attribute.

12. Assign a **Recall loan period** and **Alternate loan period**.

13. Click **Save**. The policy changes will take effect after you halt and run the Symphony servers.

The Circulation Rule will combine with the Library and Item Type policies to establish how materials can be checked out.

---

**Loan Period**

| 5 days |

**Billing Structure**

| Fine is $1.00 per day |

**Circulation Rule**

Can circulate for 2 weeks and Overdue fines are $1.00 per day
Circulation Map Policy

The Circulation Map policy is a template designed to determine how the various item types in the library should be charged to the various users. The Checkout wizard looks at the circulation map and finds the charging library, user profile of the user charging the material, and the item type being charged, then uses that information to determine how to check out the material.

NOTE Because Symphony looks for “matching” lines from the bottom-up of the circulation map list, the map order is important.
To create a new circulation map line

In this example, you will create a line in the circulation map that determines how DVD’s should be checked out from Arrowood Library by Adult users.

1. On the Circulation Configuration toolbar, click the Circulation Map Policy wizard.
2. Click Create.
3. In the Name box, type ARROW-DVD.
4. In the Description box, type Arrowood DVD’s.
5. In the Library field, select ARROWOOD from the list.
6. In the User profile field, select ADULT from the list.
7. In the Item type field, select DVD from the list.
8. In the Circulation rule box, select DVD10DAY from the list.
9. Click Save. The policy changes will take effect after you halt and run the Symphony servers.

NOTE If creating a circulation rule, item type, billing structure and a new circulation map line, complete the Circulation Map policy first and select CREATE to create the new map line and all of the attached new policies.

To re-order the circulation map

1. On the Circulation Configuration toolbar, click the Circulation Map Policy wizard.
2. Right-click the map line you wish to move, and click Cut. The line now appears italicized.
3. Right-click the map line directly above or below where you want to place the italicized line, and
   - click Insert Row Before to insert the italicized line above the selected line
   -Or-
   - click Insert Row After to insert the italicized line below the selected line.
4. Click Close.
Circulation Map Flow

The following diagram illustrates how the Symphony Circulation Map uses policy attributes:

- **Loan Period**: Circulates for 10 days
- **Billing Structure**: Fine is $1.00 per day
- **Circulation Rule**: Can circulate for 10 days and Overdue fines are $1.00 per day
- **Library**: Arrowood
- **User Profile**: Adult
- **Item Type**: DVD

---

Circulation Map Line

An Adult can check out a DVD at Arrowood for 10 days. If the DVD is overdue, the patron will be charged $1.00 per day.
Hold Map Policy

The Demand Management feature uses the Hold Map policy. This policy is similar to the Circulation Map policy, but it controls whether users can place holds, rather than controlling how items are charged to users. This feature helps libraries manage the placement of holds across libraries by particular users for particular types of items. When a user places a hold, Symphony finds a map containing the following information:

- Library that owns the item
- User Profile policy of the user placing the hold
- Item Type policy of the item.

Symphony assigns a permission to each map and determines who may place holds for that item. Symphony also assigns a priority to help determine the user’s location in the hold queue.

NOTE SirsiDynix recommends that you keep the hold map as simple as possible. Usually, you will only need a few lines in the hold map to establish permission and priority assignments.

As with the Circulation Map, Symphony reads the Hold Map from the bottom up. Symphony evaluates the list of holds against the lowest lines in the map first.
Hold Map Policy Attributes

The Hold Map Policy wizard displays the following attributes.

**Name**

This attribute uniquely identifies a specific Hold Map policy. This name is 10 characters or less, and may not include spaces or punctuation, except (-) or (_). Additionally, you cannot use the pipe character (|).

**Description**

This attribute provides more information about the policy and its use by the library. The description may be up to 60 characters in length. Although the Description attribute may contain spaces and punctuation, the pipe character (|) cannot be used.

**Item Library**

This attribute contains the policy name of the library that owns the items. If you select ALL, this map will match any library. Use the Library Policy helper to modify existing existing libraries, if needed.

**NOTE**

Unlike the Circulation Map policy, library in the Hold Map policy always refers to the item library, and is never related to the station library.
Item Type

This attribute contains the Item Type policy name of items controlled by this Hold Map policy. If you select ALL, this map will match any Item Type. Use the Item Type Policy helper to create new item types or edit existing item types, if needed.

User Profile

This attribute contains the User Profile policy name for users affected by this Hold Map policy. If you select ALL, this map will match any user profile. Use the User Profile Policy helper to create new user profiles or edit existing profiles, if needed.

Permission

This attribute determines who may place holds for these types of items. This attribute relates to placing and satisfying holds. Here are the valid values:

- **NO_HOLDS** – The hold cannot be placed on this item by this user.
- **OWN_LIB** – This hold is allowed only if the station user belongs to the library that owns the item.
- **OWN_GROUP** – This hold is allowed only if the station user’s library belongs to the Hold Group Libraries listed in the Library policy of the item library.
- **ALL_LIBS** – Includes all libraries, but is limited to the Hold Permission Libraries listed in the Library policy of the item library.

NOTE

“Station user” means the user of the WorkFlows station or OPAC session, not the patron for whom the hold is being placed.

When a station user places a system-range hold using an override, the hold can be satisfied by any item of the title; nothing disqualifies this type of hold. The Hold Map, in this instance, determines the system-range hold’s priority, but not its permission.
Priority

This attribute helps determine where the user placing the hold is in the queue. This attribute relates to satisfying holds only. Here are the valid values:

- **NONE** – The hold map does not define any special priorities.
- **OWN_GROUP** – Library users that belong to the Hold Group Libraries of the item’s owning library will receive priority when the item becomes available.
- **OWN_LIB** – Holds placed by users that belong to the library that owns the item will receive priority when the item becomes available.
- **OWNLIBGRP** – Holds placed by users that belong to the library that owns the item will receive priority first; then users within the libraries that belong to the Hold Group Libraries of the item’s owning library will receive priority when the item becomes available.

If a matching hold map does not exist for a particular hold, the permission defaults to all libraries, and the priority defaults to no priority.
Payment Type Policy

When a user pays a bill, the operator must enter the payment type. This is simply a name representing the form of payment, such as CASH. The payment type is recorded along with the payment in the bill record. The purpose is to be able to produce a report indicating how much money and in what form should be present at the workstation. Define payment types to reflect the types of payments accepted to satisfy a bill.

Payment Type Attributes

Name

This attribute uniquely identifies a specific Payment Type policy. This name is ten characters or less, and may not include spaces or punctuation, except for dash (-), underscore (_), and dollar sign ($). Additionally, the pipe character (|) may not be used.

Description

This attribute provides more information about the policy and its use by the library. The description may be up to 60 characters in length. Although the Description attribute may contain spaces and punctuation, the pipe character (|) cannot be used.

Type

This attribute indicates the kind of payment "code," which tells Symphony how to handle this Payment Type policy. The following types are delivered.

CANCEL
CASH
CARD
CHECK
CREDITACCT
DEBIT
FORGIVEN
NONE
PAYPAL
SAMFUND

**NOTE** The SAMFUND payment code is for use with payment types for the Comprise SAM online bill payment. Likewise, the PAYPAL payment code is for use with payments types for paying bills online using PayPal.
The Hold Placement Fee policy is used to control charging fees for holds placed by users or staff, a "hold placement fee" is a fee charged for processing a hold, regardless or whether the hold is filled.

Depending on the type of service, users can be charged a specified amount. For example, different hold processing fees can be charged for self-service holds (OPAC) and staff-assisted holds (staff client).

When a hold is placed in the staff client, the system determines whether the hold is self-service (placed thru OPAC) or staff-assisted (placed thru staff client), then determines what fee to apply based on the policy. The fee applied will be determined by the user profile of the holding user (user the hold is placed for), the station library, and whether the hold is placed by self-service or staff-assisted.
The system creates a bill in the amount specified in the corresponding fee field:

- If the hold is placed through the OPAC, the system creates a bill in the amount specified in the self-service fee field.
- If the hold is placed through the staff client, the system creates a bill in the amount specified in the staff-assisted fee field.

The bill is applied to the user record (for whom the hold is placed).

**Name**

This attribute uniquely identifies a specific Hold Placement Fee policy. This name is ten characters or less, and may not include spaces or punctuation, except for dash (-), underscore (_), and dollar sign ($).

**Description**

This attribute provides more information about the policy and its use by the library. The description may be up to 60 characters in length.

**Library**

This attribute contains the policy name of the station library. Select a Library policy name from the list. ALL is a valid value. If ALL is used, this map will match any library. Use the Library Policy helper to modify existing libraries, if needed.

**User Profile**

This attribute contains the User Profile policy name for users affected by this Hold Placement Fee policy. Select a User Profile from the list. ALL is a valid value. If ALL is used, this map will match any user profile. Use the User Profile Policy helper to create new user profiles or edit existing profiles, if needed.

**Self-service fee**

When creating or modifying a Hold Placement Fee policy, a fee amount can be specified for holds placed by users.

**Staff-assisted fee**

When creating or modifying a Hold Placement Fee policy, a fee amount can be specified for holds placed by staff for users.

**Searching for a Policy**

The Search features of this policy assist you in finding specific policies. To search for a policy, do the following.
1. Select a value from the list for **Library** or **User Profile** or select **All**. Any combination of these policy values can be searched.

2. Click **Search** to find the first map line that fits some of the selected search values, starting from the bottom of the list, upward.

3. Click **Exact Search** to find a map line that precisely matches the search values, starting from the bottom of the list.

4. Click **Find Next** to search from the currently selected map entry, upward.

5. Click **Clear** to begin a new search.

---

**NOTE**  
If any search category is ALL, any entry in the table will be selected, even for an Exact Search.
Order Hold Fill Wizard

WorkFlows uses the Order Hold Fill policy in conjunction with the List Onshelf Items with Holds report to determine the order of libraries from which items will be pulled to fill a hold. When the report runs, Demand Management will follow the current processes to identify items that could fill the hold based on permissions and prioritizations. Once the list of potential items have been identified, the report will check the Ordered Hold Fill policy to determine which library’s items are selected first to fill the hold. If an item is not found, the report will move to the next library in the list.

Depending on selections made in the List Onshelf Items with Holds report, the report will either consider the order of libraries within the group when pulling items to fill holds or will randomly select an item from any of the libraries in the group.

The ordered list may be composed of groups of libraries. WorkFlows selects items from libraries listed in the Ordered Hold Fill policy based on the holds pickup library.
Name
This attribute identifies a specific Order Hold Fill policy. This name is ten characters or less, and may not include spaces or punctuation, except dash (-) and underscore (_).

Description
This attribute provides more information about the policy and its use by the library. The description may be up to 60 characters in length and may contain spaces and punctuation.

Pickup Library
This attribute specifies the library where the item will be picked up. Select the appropriate library from the list.

Fill Order
Click the Policy List Gadget to select the library groups used in the policy. You may want to include libraries that are geographically close to the selected pickup library to help reduce transit time.
Credit Reason Wizard

In SirsiDynix Symphony, users may have money credited to an account by a library staff member at a workstation. Each time a user account is credited, a credit reason is recorded with the transaction. This credit reason indicates the purpose of the credit. Recording the reason for a credit can prove useful to both the library staff member and the SirsiDynix Symphony administrator to determine why a credit was created, such as refund credit or deposit credit.

Using the Credit Reason wizard, you can define Credit Reason policies. The DEPOSIT and AUTOPAY policies are delivered.

Name

This attribute is used to define the policy name or name of the credit reason. This name is ten characters or less, and may not include spaces or punctuation, except for dash (-), underscore (_), and dollar sign ($).
Description
This attribute provides more information about the policy and its use by the library. The description may be up to 60 characters in length. Although the Description attribute may contain spaces and punctuation, the pipe character (|) cannot be used.

Type
This attribute determines the type of transaction the credit reason is used for. Select a type from the list. There are two transaction types: Deposit and Withdrawal.

- Deposit – This type of transaction adds money to a patron's credit account. An example of a Deposit type credit reason is DEPOSIT.
- Withdrawal – This type of transaction deducts money from a patron's account. Examples of a Withdrawal type credit reason are AUTOPAY or CLOSEACCT.
Credit Rule Wizard

Credit Rule Wizard

Credit Rule policies determine the basic rules regarding credit accounts. Credit rules are "mapped" to specific libraries and user profiles. The Credit Rule wizard is used to create a new Credit Rule policies.

Credit rule policies are order-sensitive. Since SirsiDynix Symphony looks for "matching" credit rules from the bottom of the policy map up, the order of the credit rule map lines is important.

To move map lines in a credit rule map, do the following.

1. Select a map line (or map lines) by pressing CTRL and selecting lines and right-click. A shortcut menu opens.
2. Select Cut. The map line will appear highlighted and in italics.
3. After the map line is cut, select a new position in the map, and highlight a map line.
4. Right-click, and select either **Insert Row Before** or **Insert Row After** from the shortcut menu. The cut map line will be inserted either before or after the current map line.

To copy map lines in a credit rule map, do the following.

1. Select a map line (or map lines) by pressing CTRL and selecting lines and right-click. A shortcut menu opens.
2. Select **Copy**. The map line will appear highlighted and in italics.
3. After the map line is copied, select a new position in the map, and highlight a map line.
4. Right-click, and select either **Insert Row Before** or **Insert Row After** from the shortcut menu.
5. A dialog box will open, prompting you to type a new policy name (or names for multiple lines) for the duplicate policy.
6. Click **Save**, and the duplicated map line will be inserted either before or after the current map line.
7. If you click **Close**, the map line is not copied.

The Search features of this policy assist you in finding specific map lines. To search for a credit rule value, do the following.

1. Select a value from the drop-down list for **Library** or **User Profile** or select **All**. Any combination of these policy values can be searched.
2. Click **Search** to find the first map line that fits some of the selected search values, starting from the bottom of the list, upward.
3. Click **Exact Search** to find a map line that precisely matches the search values, starting from the bottom of the list.
4. Click **Find Next** to search from the currently selected map entry, upward.
5. Click **Clear** to begin a new search.

---

**NOTE**  
If any search category is ALL, any entry in the table will be selected, even for an Exact Search.
This attribute uniquely identifies a specific Credit Rule policy. This name is ten characters or less, and may not include spaces or punctuation, except for dash (-), underscore (_), and dollar sign ($).

**Description**

This attribute provides more information about the policy and its use by the library. The description may be up to 60 characters in length. Although the Description attribute may contain spaces and punctuation, the pipe character (|) cannot be used.

**Library**

Select a Library policy value from the list. You can use the Library policy helper to choose from a list of library policies that have been defined for your system.

**User Profile**

Select a User Profile policy value from the list. Click the User Profile policy helper to choose from a list of User Profiles that have been defined for your system.

**Bill Reasons that Can Be Paid Automatically from the Credit Account**

This attribute determines which fees/fines are automatically paid with funds from the patron's credit account when they are created.

**Bill Reasons that Can Be Paid for by Credit Account**

This attribute determines which bills can be paid for with monies from the credit account. Click the Policy List gadget to choose from a list of bill reasons.

**Maximum Credit Balance Amount**

Type the maximum credit balance amount for this user's account.
Mail Service Wizard

The Mail Service policy is used to specify default shipping methods for Books by Mail.

**Name**

This attribute represents a specific mail service. This name is ten characters or less, and may not include spaces or punctuation, except for dash (-), underscore (_), and dollar sign ($).

**Description**

This attribute provides more information about the policy and its use by the library. The description may be up to 60 characters in length.

**Shipping Time**

This attribute determines the number of days added to an item's due date to account for shipping time. The value specified in this field is applied to the loan period at checkout.
Mail Rule Wizard

Mailing characteristics for Books by Mail are defined through mail rules. A Mail Rule policy pulls together the User Profiles and Item Types available for a Books by Mail transaction. The elements of a mail rule follow.

The mail rule is read by SirsiDynix Symphony from the bottom up, where the list of rules are evaluated against the lowest lines in the map first.

To move lines in a mail rule map, do the following.

1. Select a line (or lines) by pressing CTRL and selecting lines and right-click. A shortcut menu opens.
2. Select Cut. The line will appear highlighted and in italics.
3. After the line is cut, select a new position in the map, and highlight a line.
4. Right-click, and select either **Insert Row Before** or **Insert Row After** from the shortcut menu. The cut line will be inserted either before or after the current line.

To copy lines in a mail rule map, do the following.

1. Select a line (or lines) by pressing CTRL and selecting lines and right-click. A shortcut menu opens.
2. Select **Copy**. The line will appear highlighted and in italics.
3. After the line is copied, select a new position in the map, and highlight a line.
4. Right-click, and select either **Insert Row Before** or **Insert Row After** from the shortcut menu.
5. A dialog box will open, prompting you to type a new policy name (or names for multiple lines) for the duplicate policy.
6. Click **Save**, and the duplicated line will be inserted either before or after the current line.
7. If you click **Close**, the line is not copied.

The Search features of this policy assist you in finding specific lines. To search a mail rule map value, do the following.

1. Select a value from the list for **Library**.
2. Click **Search** to find the first line that fits some of the selected search values, starting from the bottom of the list, upward.
3. Click **Exact Search** to find a line that precisely matches the search values, starting from the bottom of the list.
4. Click **Find Next** to search from the currently selected entry, upward.
5. Click **Clear** to begin a new search.

---

**NOTE**  
If any search category is **ALL**, any entry in the table will be selected, even for an **Exact Search**.

---

**Name**

This attribute uniquely identifies a specific Mail Rule policy. This name is ten characters or less, and may not include spaces or punctuation, except for dash (-), underscore (_), and dollar sign ($).

**Description**
This attribute provides more information about the policy and its use by the library. The description may be up to 60 characters in length.

Library

Select a Library policy value from the list. You can use the Library policy helper to choose from a list of library policies that have been defined for your system.

User Profile

Select a User Profile policy value from the list. Click the User Profile policy helper to choose from a list of User Profiles that have been defined for your system.

Item Type

Select an Item Type policy value from the list. Use the Item Type Policy helper to create new item types, if needed.

NOTE

This policy affects Place Hold wizard and OPAC displays. If a User Profile is not allowed to have items mailed via Books by Mail, the relevant display fields do not appear.

Item Types that can not be mailed should not be used to fill holds that are configured to be mailed.

If a hold that does not qualify for mailing is placed as a system hold, an override option appears.

If a title or copy hold does not qualify for mailing, a system message appears.
The Shipping Cost policy is used to specify default shipping charges for each available mailing option.

As with the circulation map, the shipping cost map is read by SirsiDynix Symphony from the bottom up, where the list of shipping costs are evaluated against the lowest lines in the map first.

To move map lines in a shipping costs map, do the following.

1. Select a map line (or map lines) by pressing CTRL and selecting lines and right-click. A shortcut menu opens.
2. Select Cut. The map line will appear highlighted and in italics.
3. After the map line is cut, select a new position in the map, and highlight a map line.
4. Right-click, and select either Insert Row Before or Insert Row After from the shortcut menu. The cut map
line will be inserted either before or after the current map line.

To copy map lines in a shipping costs map, do the following.

1. Select a map line (or map lines) by pressing CTRL and selecting lines and right-click. A shortcut menu opens.

2. Select Copy. The map line will appear highlighted and in italics.

3. After the map line is copied, select a new position in the map, and highlight a map line.

4. Right-click, and select either Insert Row Before or Insert Row After from the shortcut menu.

5. A dialog box will open, prompting you to type a new policy name (or names for multiple lines) for the duplicate policy.

6. Click Save, and the duplicated map line will be inserted either before or after the current map line.

7. If you click Close, the map line is not copied.

The Search features of this policy assist you in finding specific map lines. To search a shipping costs map value, do the following.

1. Select a value from the list for Library, User Profile, or Item Type or select All. Any combination of these policy values can be searched.

2. Click Search to find the first map line that fits some of the selected search values, starting from the bottom of the list, upward.

3. Click Exact Search to find a map line that precisely matches the search values, starting from the bottom of the list.

4. Click Find Next to search from the currently selected map entry, upward.

5. Click Clear to begin a new search.

NOTE If any search category is ALL, any entry in the table will be selected, even for an Exact Search.
Name
This attribute represents a specific cost. This name is ten characters or less, and may not include spaces or punctuation, except for dash (-), underscore (_), and dollar sign ($).

Description
This attribute provides more information about the policy and its use by the library. The description may be up to 60 characters in length.

User Profile
This attribute identifies the group of users to whom the item will be shipped.

Mail Service
This attribute identifies the Mail Service policy name of the type of mail service that will be used to ship the item.

Library
This attribute identifies the Library policy name of the library associated with the item to be shipped.
Unsuspend Reason

When users return overdue materials, some libraries suspend a user's loan privileges (using the Suspend User wizard) rather than assess overdue fines. To waive or forgive a user suspension, use the Unsuspend User wizard. When removing a suspension, you must provide a reason for unsuspension. Symphony provides two unsuspend reasons:

- Suspension Cancelled (CANCEL)
- Suspension Forgiven (FORGIVEN)

Do not remove these unsuspend reasons. Use the Unsuspend Reason Policy wizard (on the Circulation Configuration toolbar) to create additional unsuspend reasons. You can also use this wizard to display, modify, copy, or remove Unsuspend Reason policies.

Symphony retains unsuspension records for users. Each unsuspension record has an unsuspend reason.
To add a new unsuspend reason

1. On the Circulation Configuration toolbar, click the Unsuspend Reason wizard. The following window appears:

   ![Unsuspend Reason wizard window]

2. Click Create. The following window appears:

   ![Create unsuspend reason window]

3. Type a name for the new policy (10 character limit – no spaces or punctuation).

4. Type a description for the new policy (60 character limit – may contain spaces or punctuation).
Default Price

The Default Price policy defines the default price and associated processing fees for lost items. This policy is used with the Mark Item Lost wizard and Symphony’s lost item processing, including the Assumed Lost report. The Default Price policy can be mapped to specific item type and library combinations.

Default Price Attributes

The Default Price policy contains the following attributes.

**Name**

This attribute uniquely identifies this policy.

**Description**

This attribute provides more information about the policy and its use by the library.

**Item type**
Default prices can be mapped to specific item types, or all item types.

Library

Libraries can define default prices for their items that differ from other libraries in the system. The library defined in this attribute is based on the global configuration setting that determines which circulation policies are being used.

Processing fee

A standard fee for processing lost items can be applied.

Default price

A standard default price can be applied to this item type and library combination.

Automatic removal of processing fee

This attribute can be selected if the processing fee should be automatically removed from the user’s bill when a lost item bill is removed when the item is discharged or returned to circulation.

Use default price

This attribute can be selected if the default price should always be applied, rather than the price of the item record. If this check box is cleared, Symphony will apply the price from the item record. If there is no price in the item record, the default price will be applied.

Automatic Refund

Select this check box if you want to create an automatic refund credit for a paid lost item bill when the lost item is checked in. If you select this check box, a refund credit for the amount the user paid for the lost item bill (replacement cost and processing fees) is added to the user's credit account, and the item's location is changed to STACKS. If you clear this check box, the item's location is changed to STACKS, and no refund credit will be added to the user's credit account. By default, this check box is cleared.
**Using a “default” Default Price policy**

When there are multiple Default Price policies, if the system needs a default price it will start at the top of the list and find the first policy that matches on the Item Type and Library. You can create a “default” Default Price policy if you don’t want to create a Default Price policy for every single Item Type. The “default” Default policy would indicate ALL for the Item Type. Any item not previously listed in a Default Price policy would read this line. In the example below, books, magazines and DVD’s would each get their own default price. All other Item Types would get the “default” default price.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Library</th>
<th>Item Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAGAZINE</td>
<td>Default price for Magazines</td>
<td>ALL</td>
<td>MAGAZINE</td>
</tr>
<tr>
<td>BOOK</td>
<td>Default Price for Books</td>
<td>ALL</td>
<td>BOOK</td>
</tr>
<tr>
<td>DVD</td>
<td>Default price for DVDs</td>
<td>ALL</td>
<td>DVD</td>
</tr>
<tr>
<td>DEFAULT</td>
<td>Default price policy for all other items</td>
<td>ALL</td>
<td>ALL</td>
</tr>
</tbody>
</table>

![Default Price: List Policies](image_url)
Exercises

Exercise 4

**Scenario:** The board of directors at your library has decided to charge non-residents $20/year for library privileges. The library card will only be valid for one year.

**Action:** Copy an existing user profile (i.e. PUBLIC) to make a new one for non-residents. Modify the appropriate fields based on the decisions of the library board.

Exercise 5

**Scenario:** The library has decided to start cataloging and circulating bestsellers differently from the rest of the collection. All bestsellers will now start circulating for 21 days.

**Action:** Create a new item type policy called BESTSELLER. Follow the steps on page 130.

Exercise 6

**Scenario:** In the previous exercise, you added a new item type policy of BESTSELLER. In order for bestsellers to circulate, you will need a new loan period, circulation rule and circulation map line that work with bestsellers. Bestsellers will circulate the same for all Libraries and user profiles.

**Action:** Copy an existing loan period (i.e. 14DAY) to create a new 21-day loan period. Copy an existing circulation rule (i.e., 14DAY) to create a new one that points to your new 21-day loan period. Add a new line to the circulation map for bestsellers. This map line should point to your new circulation rule. Remember to place it in the appropriate position in the circulation map.
Cataloging Configuration

Overview

The Symphony catalog contains all of the system’s bibliographic and physical copy information. Each title has a bibliographic description, one or more call numbers linked to the title, and may have one or more copies linked to each call number. Text in the bibliographic description is indexed, as well as selected elements in the title, call number, and copy records. Records are indexed either in the standard catalog (searchable by all users) or in the shadow catalog (used only by staff).

The Cataloging Configuration toolbar contains the following wizards:
Catalog Format Policy

The Catalog Format policy controls the display, editing, data validation, and indexing of all fields in bibliographic and holdings records used in Symphony. A Format policy is a list of entries allowed to be used by a given type of record, along with the characteristics of each entry. All formats in Symphony have been grouped according to their general purpose or use. By assigning a particular purpose to a format, Symphony prompts the user only with appropriate format choices at any place in the system when a Format policy is requested.

Select a Catalog Format policy and click Display to view the Basic, Entries, and Fixed fields tabs. The following sections discuss the attributes on each tab.

Basic Tab

**Name**

This 1-10 character attribute uniquely identifies the format policy.

**Description**

This 1-60 character attribute describes the purpose of the format policy. This description is for reference purposes only.
Record Type

This attribute contains the type of records that will use this Format policy. Available types are MARC, CENDI, or OTHER. MARC is used for USMARC catalog-purpose and authority-purpose Format policies. CENDI is used for COSATI/CENDI catalog records, and OTHER is used for all other Format policies. You cannot modify this attribute.

Purpose

This attribute specifies how this Format policy will be used with Symphony records. Symphony assigns this attribute when you create a format. You cannot modify this attribute.

Allow attached copies

This attribute determines whether call numbers and copies can be associated with a catalog record whose description uses this format.
Entries Tab

Entry IDs are the building blocks that define the Symphony fields and their characteristics in the various types of records used in Symphony. The Format policy has two types of Entry IDs: Simple and Synonym List. A simple entry ID identifies an entry that may be used in a specific type of variable length record format. Synonym lists are used to define groups of entries for brief and full displays and for cataloging templates.
**Entry ID Synonym List**

**Full entries**

This attribute contains a synonym list Entry ID policy that defines which fields appear in a full record as well as the order of the displayed fields. A full MARC record display generally includes the following simple Entry ID policies that represent bibliographic tags.

100, 110, 111, 130, 240, 245, 250, 260, 300, 400, 410, 411, 440, 490, 500, 505, 514, 520, 526, 552, 590, 596, 600, 610, 611, 630, 650, 651, 700, 710, 711, 730, 740, 856

**Brief entries**

This attribute contains a synonym list Entry ID policy that defines which fields appear in a brief record as well as the order of the displayed fields. A brief MARC record display generally includes the following simple Entry ID policies, which represent bibliographic tags.

TITL, DATE

**Template entries**

This attribute contains a synonym list Entry ID policy that defines which empty fields appear when the Add Title wizard or the Add Empty Entries property is used to create items with this Format. A template MARC record generally includes the following simple Entry ID policies.

100, 245, 260, 300, 500, 505, 520, 590, 650

**Entries List**

This section displays a list of entries that are used with the Format policies. From this list, you can create, display, modify, or remove entry information. Selecting an entry and clicking Create, Display, or Modify displays the following tabs.

- Basic
- Display
- Keyword
- Browse
- Authority
- Hypertext
- Punctuations
Entries – Basic Tab

**Entry ID**

This attribute contains the entry ID used with this Format policy. Entry IDs must be unique, and if the format is MARC, the entry ID must correspond to the MARC tag number.

**Internal entry number**

This attribute contains the internal entry number used by the system. This number is relative only to the format and entry you are working with. Internal entry numbers must be unique and, for MARC type formats, must correspond to the MARC tag number and be between 1 and 999.
**Entry name**
This attribute describes the entry ID.

**Allow edit/create**
This attribute specifies whether the entry may be edited or created.

**Required**
If you select this attribute, the phrase **REQUIRED FIELD** is added to the data portion of the entry.

**Valid indicator 1**
For MARC formats only, the valid indicator 1 attribute is used to build a list of values permitted for use in the indicator 1 position of this entry.

NOTE
This attribute is only applicable if the entry permits the use of indicators.

**Valid indicator 2**
For MARC formats only, the valid indicator 2 attribute is used to build a list of values permitted for use in the indicator 2 position of this entry.

NOTE
This attribute is only applicable if the entry permits the use of indicators.

**Example** – According to MARC 21 guidelines, the 650 (Topical Subject Heading) entry permits the use of both indicator positions. Indicator 1 permits 0-2 as valid values, and indicator 2 permits 0-7 as valid values. If the entry description for the 650 entry has defined valid values for indicator 1 as 0-2, and indicator 2 has been configured to allow 0-7, then if someone inputs a four into the indicator 1 position, the system will display an error message. If a four is entered in the indicator 2 position, no error message will display, since four is a valid value for indicator 2.

**Data type**
This attribute is used to specify whether the data in this entry must be alphabetic, alphanumeric, numeric, printable, or whether the data may be any type of character.
Valid subfields

This attribute contains the subfields of this entry that are valid for this format policy.

Example – According to MARC 21 guidelines, only four subfields are recognized as valid in the 020 (ISBN) entry: |a,|c, |z, and |6. To prevent use of an illegal subfield or to serve as a validation check, the 020 entry in a format policy may have a valid subfields attribute containing only the |a, |c, |z, and |6. If a subfield other than the four listed in this attribute is used and if your system is configured to do so, the system will display an error message.

Minimum size

This attribute is used to enforce a limit on the number of characters that can be entered in an entry. The smallest allowable value is zero; the largest allowable value is 9,999.

Maximum size

This attribute is used to enforce a limit on the number of characters that can be entered in an entry. The smallest allowable value is zero; the largest allowable value is 9,999.

Default value at creation

This attribute is used to specify default data that will display in an entry when a catalog record is created. The default data may be up to 200 characters.

Example – When a record is created in the workstation, Symphony can create a 598 (Bulletin heading) entry with the default text “NEW.” If the system has been configured to display a list of new books, this item will display on the list. If this new item should not be included on the list, delete the 598 entry from the record.

Entry type

To indicate any special meanings or uses of this entry, entry types may be specified. This attribute also determines if an entry uses other format policy attributes.

NOTE Based on the format policy’s purpose, the entry types may vary.
Entry Class

Each entry is assigned one of the following entry classes: VARIABLE, LEADER, FIXED, CONTROL, or CODED. The default is set to VARIABLE. The entry class may be modified when creating custom formats or adding custom entries to existing formats, typically UNIMARC formats.

⚠️ **CAUTION** Do not modify the entry class for entries in the SirsiDynix delivered formats.
Entries – Display Tab

NOTE The attributes displayed depend on the purpose of the Format policy.

Display Variations

This attribute contains a list of display variations. This list contains the different labels that may display for the entry, based on the indicators present in the record.

NOTE Indicators must have been previously defined in the Basic Tab for Entries.
Variations

Display variations attributes affect the entry label based on the content of the indicator positions in MARC bibliographic records. In addition to the label, subfields, and send unformatted attributes, you will need to specify which indicator in the record should be considered (if any) and which values to look for in the indicator positions (from the list of valid indicator values).

**Example** – The display label used for the 246 (Varying Form of Title) entry is determined by the value in the second indicator position. As defined in the USMARC guidelines, if the second indicator is 4, then the label “Cover title” should be used for the display of the 246 entry. In the MARC Format, the 246 entry will have a display variation for each of the valid values for Indicator2. Display variation 4 could be configured to display the label “Cover title” if Indicator2 has a value of 4. All subfields should display except the obsolete ones (|d and |e) and the linkage subfield (|6).

**NOTE**

Even if the indicators have no bearing on the display of the entry’s label, Display Variation attributes are used to specify which subfields should display.

**Indicator 1** – This attribute displays when the display label can change based on the indicator values in the record using this Format.

**Indicator 2** – This attribute displays when the display label can change based on the indicator values in the record using this Format.

**Label** – This attribute specifies the name of the label to use for this entry. This label may be modified, but if it is changed in the Format policy it appears exactly as typed regardless of the language being used in the workstation.

**Subfields** – This attribute specifies which subfields to display with this entry.

**NOTE**

The |= and |? subfields are used internally by Symphony and are always excluded from display.
**Send unformatted** – This attribute is used in MARC catalog-purpose and Z39.50-purpose formats. This attribute indicates whether the data should be sent to the workstation formatted for display as well as unformatted. Unformatted data does not display, but is available for use by hypertext, WWW, and image file linking.

**Ranking for hit list displays**

This attribute is used to indicate a ranking of up to four lines to appear in any wizard that retrieves a list of bibliographic records, or in the iBistro/iLink catalog hit list display. For each line, the user is prompted to input a ranking (1-999) for this entry to guide hit list displays. In Line 1, the first entry with a rank of 1 will appear as the first field of a hit list display. If no entries exist with that rank, then the first with a rank of 2 will appear. In Line 2, the first entry with a rank of 1 will appear as the second field of a hit list display. If no entries exist with that rank, then the first with a rank of 2 will appear.
Entries – Keyword Tab

Changes to keyword index variations affect records indexed after you make changes. To implement changes to keyword indexes in records already keyword indexed, run the Rebuild Text Database report to reindex all your bibliographic records. Keyword searching and browsing will be disrupted while this report runs.

Keyword index variations

To modify a keyword index variation, select it from the list and make your changes. Modify will save your changes. To add a keyword index variation, type in new values and select Create.

This variation is ☐ in addition to others ☐ supersedes others

Indicator 1:  
Indicator 2:  
Index:  
Subfields: N  
Leading article:  

When an entry is created in a Format policy, you must specify whether the entry will be indexed.

Keyword index variations

This section displays a list of Keyword Indexes to which this entry will be posted.
Variations

First, specify whether this keyword variation is in addition to other variations or if this variation supersedes the other variations. Select “in addition to others” if this entry should be posted to the specified keyword index in addition to other keyword indexes for which this entry qualifies. Select “supersedes others” if this entry should be posted to this keyword index instead of any other keyword indexes for which this entry qualifies.

**Indicator 1** – This attribute contains an indicator value that will cause this entry to be posted to a particular Keyword Index.

**Indicator 2** – This attribute contains an indicator value that will cause this entry to be posted to a particular keyword index.

**Index** – This attribute contains the Keyword Index policy representing the keyword index to which this entry will be posted.

**Subfields** – This attribute specifies the subfields of this entry that should be posted to the specified keyword index.

**Leading article** – This attribute specifies how initial non-filing articles should be handled when a term is posted to the specified keyword index.

---

**NOTE**  
The `|?` and `|=` subfields, used internally by Symphony, must be posted to keyword indexes so that authority control features, such as global updating and the List Unauthorized Bib Records and List Unauthorized Tags reports, will work properly.
Entries – Browse Tab

Changes to browse index variations affect records indexed after you make changes. To implement changes to browse indexes in records already browse indexed, run the Rebuild Headings report followed by the Rebuild Text Database report to reindex all your bibliographic records. Searching for bibliographic records will be disrupted while this report runs.

To modify a browse index variation, select it from the list and make your changes. Modify will save your changes. To add a browse index variation, type in new values and select Create.

List of browse variations

When an entry is created in a Format policy, you must specify whether the entry will be browseable.

List of browse variations

This section displays a list of browse indexes to which this entry will be posted.
Browse index variations

Variations – First, specify whether this browse variation is in addition to other variations or if this variation supersedes the other variations. Select “in addition to others” if this entry should be posted to the specified browse index in addition to other browse indexes for which this entry qualifies. Select “supersedes others” if this entry should be posted to this browse index instead of any other browse indexes for which this entry qualifies.

Indicator 1 – This attribute contains an indicator value that will cause this entry to be posted to a particular browse index.

Indicator 2 – This attribute contains an indicator value that will cause this entry to be posted to a particular browse index.

Index – This attribute contains the Browse Index policy representing the browse index to which this entry will be posted.

Subfields – This attribute specifies the subfields of this entry that should be posted to the specified browse index.

NOTE The |= or |? subfields should not be posted to browse indexes.

Leading article – This attribute specifies how initial non-filing articles should be handled when a term is posted to the specified browse index.

If initial non-filing articles are not to be used when posting a term to a browse index, a method of identifying non-filing articles must be specified. Non-filing articles must be identified by values in the indicator positions (NONE, INDICATOR1, INDICATOR2), from the list of articles displaying in the Language policy for any matching language code in the record (LANG_ART), or from the list of articles displaying in the default language of the Language policy (DEF_ART).

Would the browse index be used based on an entry combination? – This checkbox option is available on existing browse variations where you would have the option to create combined browse index variations for a main catalog-type entry. For more information on the Entry Combination, refer to the WorkFlows Online help.
Entries – Authority Tab

Changes to authority index variations affect records indexed after you make changes. For information on implementing changes to authority control in records already indexed, select the help icon on the toolbar.

**Authority variations**

To modify an authority index variation, select it from the list and make your changes. Modify will save your changes. To add an authority index variation, type in new values and select Create.

**List of authority variations**

<table>
<thead>
<tr>
<th>Internal entry</th>
<th>Index</th>
<th>Indicator</th>
<th>Provisional subfields</th>
<th>Cascade subfields</th>
</tr>
</thead>
</table>

**Indicator:**

**Index:**

**Provisional subfields:**

**Cascade subfields:**

**Leading article:**

If an entry in a bibliographic record is to be placed under authority control, at least one authority index variation must be defined.

**List of authority variations**

This section displays a list of authority indexes to which this entry will be posted.
**Authority variations**

**Indicator** – This indicator value determines which authority index should be used. The authority index attribute is only used if the bibliographic entry's second indicator is equal to this value.

**Example** – If the 650 field has a value of 0, this term should be checked against the LCSUBJECT authority index. If the second indicator's value is 2, the term should be checked against the NLMSH authority index. In this case, there would be two authority index variations for the 650 entry, as follows.

Authority Index : LCSUBJECT
Indicator : 0

Authority Index : NLMSH
Indicator : 2

**Index** – This attribute specifies the authority index to use for authority matching.

**Provisional subfields** – This attribute contains a list of subfields to be used if an unmatched entry should create a provisional authority record. Any valid subfield, or all valid subfields, may be specified for inclusion.

---

**NOTE**  
This attribute only displays if your system is configured to create provisional authority records. It is not recommended to have your system create provisional authority records.
**Cascade subfields** – This attribute is used to specify a list of subfields to be dropped for authority control matching purposes. If the entire entry does not match a heading in the authority index, the last subfield in the entry will be dropped if it is on the cascade list. This process continues until either the heading finds a match in the authority index or the last subfield in the record is not on the cascade list.

**Example** – When matching a 650 (Subject Term) entry, certain subfields could be cascaded to increase the probability of a match. If the list of authority cascade subfields includes |x, |y, and |z, authority matching would take place as follows.

1. The bibliographic record contains the following entry.

   650 : 0 : Vernacular architecture|z Texas, West|x History|y 19th century.

2. When matching the bibliographic entry against the authority index, Symphony will first attempt to match the entire string. Assuming this exact subject heading is not in the authority index, Symphony will drop |y ("19th century") from the matching process.

3. If there is not an entry in the authority index for Vernacular architecture|z Texas, West|x History, Symphony will drop the |x ("History") from the matching process.

4. If there is not an entry in the authority index for Vernacular architecture|z Texas, West, Symphony will drop the |z ("Texas, West") and attempt to match on Vernacular architecture.

5. If no match is found, Symphony will not drop the |a since it is not on the cascade list. The entry will be marked as UNAUTHORIZED.

**Leading article** – If a leading article should be stripped from the bibliographic term before it is checked against the authority index, a way of recognizing leading articles must be specified. Non-filing articles must be identified by values in the indicator positions (Indicator 1 or 2), from the list of articles displaying in the Language policy for any matching language code in the record, or from the list of articles displaying in the default language of the Language policy.
Entries – Hypertext Tab

NOTE Information appears on this tab only if you select Hypertext Entry in the Entry Type box on the Entries-Basic tab.

If an entry is of the hypertext entry type, you can select this entry information in the record to search for additional, related information. For example, if the author's name is a hypertext link, selecting this name displays additional items written by this author.

Subfields used in hypertext search

This attribute allows you to specify what information within the entry, based on selected subfields, to include in the new hypertext search.

Example – To include the likelihood of finding matching records when performing a hypertext lookup, do not include subfields that narrow your search. In the 100 entry in the MARC Format, setting this attribute to include only |a will prevent the hypertext search string from containing potentially limiting subfields, such as |w and |e.
Entries – Punctuations Tab

Entry punctuation specifies whether an entry should display punctuation at the beginning of, the end of, or should enclose an entire entry. The punctuation is not actually added to the entry, rather it is sent as part of the display.

**Punctuation to begin and end entry**

**Beginning punctuation** – This attribute specifies the punctuation an entry should display at the beginning of an entry.

**End punctuation** – This attribute specifies the punctuation an entry should display at the end of an entry.

**List of punctuation variations**

This section area contains a list of the different punctuation variations for this entry.
Variations

The attributes in this section specify whether special punctuation should display based on the presence of certain subfields. A subfield(s) may be replaced with punctuation, may be enclosed in 1-20 punctuation characters, or may be displayed in a sequence.

Type – This attribute specifies how punctuation is used when displaying an entry. If a type is not specified, you may enter only beginning punctuation.

If Replace is selected, you are prompted to enter a replacement string and the affected subfields.

If Enclose is selected, you are prompted to enter beginning punctuation, ending punctuation, and the affected subfields.

If Sequence is selected, you are prompted to enter beginning punctuation, middle punctuation, and the affected subfields.

Beginning punctuation – This attribute contains the punctuation an entry should display at the beginning of an entry, if the subfields specified in the subfields attribute are included in this entry.

Middle punctuation – This attribute contains the punctuation an entry should display at the middle of an entry, if the subfields specified in the subfields attribute are included in this entry.

End punctuation – This attribute contains the punctuation an entry should display at the end of an entry, if the subfields specified in the subfields attribute are included in this entry.

Replacement string – This attribute contains the punctuation that will replace the specified subfields.

Subfields – This attribute displays a set of subfields that, if present in the entry, affects the display of the entry punctuation.

Example – Libraries may wish for subfield markers in 6XX entries to be replaced by dashes so that display of a record may more closely resemble a catalog card. In the case of the 6XX entries, instead of displaying the |x, |y, and |z characters as a blank space, the subfields may be replaced with the characters "--."

Personal subject: Beethoven, Ludwig van, 1770-1827--Manuscripts--Facsimiles.
Create a 905 Entry ID, Add to Synonym Lists, and Format for Entry

Symphony uses the 905 entry ID that you create in both MARC and SERIAL catalog purpose formats. You can think of the 905 as a locally defined note field that is not a valid entry in Symphony when delivered.

To create a new entry ID

1. On the Cataloging Configuration toolbar, click the Catalog Format Policy wizard. The List Policies window appears.
2. Select MARC, and click Modify.
3. Click the Entries tab.
4. Click Create.
5. Click the Entry ID helper.
6. Click Create.
7. In the Name box, type 905.
8. In the Description box, type a description such as Local Information.
9. Verify that Simple Entry ID is selected.
10. Click Save.
11. On the Basic Tab, select 905 from the Entry ID list.
12. Select Allow edit/create.
13. Leave the Required check box cleared.
14. Leave the Valid indicator 1 and Valid indicator 2 boxes blank.
15. In the Data type box, select ANY.
16. Click the Valid subfields gadget, and check the boxes next to those subfields that should be valid for the 905 entry. Check the boxes for those subfields that are repeatable.
17. Click **OK**.

18. In the **Minimum size** box, type a number between zero and 9999.

19. In the **Maximum size** box, type a number between zero and 9999.

20. Leave the **Default value at creation** box blank.

21. Click the Entry type gadget, click **Local**, and then click **OK**. Entries that are marked as having the Local Entry Type are not replaced when a matching record is overlaid. Local information is retained in the record, along with the new information from the overlaying record. Entries used to record information that is unique to a given site, such as local notes (590), are often marked as local.

22. Verify that the entry class is **VARIABLE**.

23. Click the **Display** tab.

24. Type a **Label**.

25. Leave the **Subfields** box blank and the **Send unformatted** check box cleared.

26. Click **Create**, and then **Save**.

27. Click **Save** to exit the MARC catalog purpose format.

28. Repeat steps 2-27 using the SERIAL catalog format policy.
To display the new entry ID in synonym lists

To add the entry ID to the MARC template and full synonym lists, and the SERIAL template and full synonym lists, refer to the following steps:

1. On the Cataloging Configuration toolbar, click the Catalog Format Policy wizard.
2. Select MARC and click Modify.
3. Click the Entries tab.
4. Click the Entry ID helper.
5. Click MARC-FULL on the list, and click Modify.
6. Click the gadget next to the Entries field.
7. Scroll down to select 905 in the List to choose from. Click the arrow to move the entry over to the List selected.
8. Select 905 in the List selected, then click the Up or Down arrows to move the entry to the desired position in the list.
9. Click OK.
10. Click Save.
11. Click Save again.
12. Repeat steps 4-11, substituting MARC-FULL with MARC-TEMPL.
13. Repeat steps 1-12, substituting the MARC format policy with SERIAL (SERIAL-FUL, SERIAL-TEM)
**Keyword Index Policy**

When a search is performed in the catalog, search terms are looked up in keyword indices. The majority of Keyword Index policies describe individual entries found in bibliographic records in the system. The presence of a Keyword Index policy for an entry means that the entry is indexed and searchable. Other types of Keyword Index policies are used to group individual entries for specific types of searches.

**Internal Synonym Keyword Index**

Internal Synonym Keyword Index policies define which entries are searched when a user performs a particular search in the OPAC.

As delivered, the following entries are included in Internal Synonym Keyword Indexes.

<table>
<thead>
<tr>
<th>Search Field</th>
<th>Internal Synonyms</th>
<th>Keyword Indexes Searched</th>
</tr>
</thead>
<tbody>
<tr>
<td>Author</td>
<td>AU</td>
<td>100, 110, 111, 700, 710, 711, 720, AUTH, CORP</td>
</tr>
<tr>
<td>Periodical Title</td>
<td>PER</td>
<td>245, 246, 780, 785</td>
</tr>
<tr>
<td>Series</td>
<td>SER</td>
<td>400, 410, 411, 440, 490, 800, 810, 811, 830, 840</td>
</tr>
<tr>
<td>Subject</td>
<td>SU</td>
<td>600, 610, 611, 630, 650, 651, 655, 690, 691, DESC, IDEN</td>
</tr>
<tr>
<td>Title</td>
<td>TI</td>
<td>130, 245, 246, 440, 730, 740, TITL, CTTL</td>
</tr>
</tbody>
</table>
Synonym List Keyword Index

Synonym List Keyword Index policies also define which entries are searched when a given type of search is performed in the OPAC.

As delivered, general searches use a GENERAL Synonym List Keyword Index that contains no synonyms in the synonym list attribute. In this way, a search of the type General searches all indexed entries.
Searchable Keyword Index

Searchable Keyword Indexes represent a single entry from a bibliographic record. They are mapped to internal tags used by the BRS search software, and are also linked to sort indexes and Z39.50 use attributes.

![Keyword Index Window]

- **Name:** T100
- **Description:** Personal author
- **Type:**
  - Searchable
  - Synonym list
  - Non searchable
  - Internal synonym
- **Internal name:** T100
- **Synonyms:**
- **Sort index:** SAU
- **Use attribute:** AUTHOR (1003)

[Save] [Cancel]
Customizing Keyword Index Policies

The 856 field is not delivered as an indexed field, therefore, information in this field cannot be searched. To make this entry ID searchable under a general keyword search, create a keyword index for the 856 field for MARC and SERIAL catalog formats.

**To create a new keyword index**

1. On the Cataloging Configuration toolbar, click the **Keyword Index Policy** wizard.
2. Click **Create**.
3. In the **Name** and **Description** fields, type **856**.
4. Next to **Type**, click **Searchable**.
5. In the **Internal name** box, SirsiDynix delivers several reserved values that you can use for newly-indexed entries. These values are in the range AL01-AL36 or NM01-NM06. Select the next available internal name value from the list.
6. Leave the **Sort index** blank. The field will be populated upon saving.
7. Select **ANY** (1016) in the Use attribute field.
8. Click **Save**.
To add the new keyword index to keyword index variations in the Catalog Format policies

After you create the Keyword Index policy, add a keyword index variation to the 856 entry in the MARC and SERIAL Format policies.

1. On the Cataloging Configuration toolbar, click the Catalog Format Policy wizard.
2. Select MARC, and click Modify.
3. Click the Entries tab.
4. Select the 856 entry ID and click Modify.
5. Click the Keyword tab.
6. Select whether this variation should be used regardless of whether there are other variations, or whether all variations should be considered when indexing this entry. Click In addition to others.
7. Indicate whether the value in the Indicator 1 position should be used to determine how to index this field. Click the gadget to select whether the indicator should be considered. Click No, and then click OK.

8. Select 856 from the Index list.
9. Indicate which Subfields should be posted to the index. Click the gadget, and select subfields for inclusion, or select ALL to include all subfields, and then click OK.
10. Click **Create** to add the keyword index variation. The following window appears:

11. Click **Save**.
12. Click **Save** again.
13. Repeat steps 2-12 substituting the MARC format policy with SERIAL.

**NOTE** To retroactively index the 856 fields, run the Rebuild Text Database report.
Classification

The Classification policy controls the treatment of call numbers in Symphony. Symphony uses some attributes of the policy to calculate shelving keys. It uses others to format the call number display.

Classification Policy Attributes

Name

Uniquely identifies a specific Classification policy. The Name should be 10 characters or less, and cannot include spaces or punctuation except ( - ) or ( _ ).

Description

Description provides additional information about the policy and its use by the library. The description can be up to 60 characters in length.
Sort rule

When a cataloger enters a call number class scheme for a record at the workstation, the shelving key is derived automatically using the Classification policy’s sort rule. The shelving key takes the call number and, depending on the sort rule, adds zeros and spaces to different parts of the number or number/letter string.

There are eight possible sort rules:

**ASIS** – Makes the shelving key the same as the call number, that is, leaving the call number “as is.”

**ATDEWEY** – Makes the shelving key appropriate for sorting Dewey Decimal fiction call numbers by adding a three-letter title cutter or a three-letter author and a three-letter title cutter to the existing call number.

**ATDEWEYLOC** – Makes the shelving key appropriate for sorting Dewey Decimal fiction call numbers whose class number is preceded by a location code. The call number is examined for cutters and if needed a three-letter title cutter or a three-letter author and a three-letter title cutter is added to the existing call number.

**DEW_SANBRN** – Used for call numbers that have cutters created from the Cutter-Sanborn tables (for example, cutters in the form J J1234xyz).

**DEWEY** – Makes the shelving key appropriate for sorting Dewey Decimal nonfiction call numbers. This rule assumes that the first numeral encountered is the classification code. Any preceding letters are location marks to be ignored. Letters after the classification numeral group are left as is. Numerals after the classification group expand to six digits.

**EXP_NUM** – Makes the shelving key with every number in the call number expanded to six digits.

**LC** – Makes the shelving key appropriate for sorting Library of Congress call numbers.

**LC_LOC** – Makes the shelving key appropriate for sorting Library of Congress call numbers whose class number is preceded by a location code.

**SUDOC** – Creates a shelving key appropriate for sorting SuDoc call numbers assigned to government documents.

**UDC** – Creates a shelving key appropriate for sorting Universal Decimal Classification call numbers.
Make rule

The make rule is used when loading catalog records in batch from a file created by a bibliographic utility like SmartPort, OCLC/PRISM, BiblioFile, SuperCAT, or MARCIVE. Make rules apply formatting to call numbers extracted from fields in the incoming record before creating the Symphony call number.

**NOTE**

Make rules apply formatting to only the first subfield a in a MARC entry. The only exception is the ASIS make rule, which is typically used for call numbers in the 099 entry.

There are five types of call number make rules:

**ASIS** – No formatting is applied to the call number.

**AUTO** – Ignores everything in the bibliographic record and makes a unique Symphony call number in the following format:

$$XX(\text{internal number.call sequence number})$$

Here’s an example of a Symphony call number created by the AUTO make rule:

$$XX(1423.1)$$

**DEWEY** – Only letters, digits, spaces, and periods are copied into the Symphony call number. Commas, slashes, and other characters are ignored.

**GPO** – All characters except commas are copied to the Symphony call number. The first comma encountered is skipped, and any additional commas are replaced with spaces.

**LC** – Removes the space, if present, between the classification letters and numbers. It also inserts spaces between cutters if missing. The LC make rule does not remove all inconsistencies in LC call number formatting.
NOTE  Do not confuse make rules with classifications. For example, to retain slashes in Dewey call numbers, do not change the classification of the call numbers from DEWEY to ASIS. Instead, change the make rule of the DEWEY classification from Dewey to ASIS. This would not correct call numbers that have already been loaded; it would only keep the slashes from being stripped out of future call numbers.

Case

Each make rule is associated with a case statement. If the make rule is marked Mixed, the case of call number characters is retained when copied into the Symphony call number. If the make rule is marked Upper, all call number characters convert to uppercase.

NOTE  This attribute only appears if the Display Call Number options in the Global Configuration wizard are set to allow Call Numbers in Mixed Case.

Display

Display determines the order in which call numbers display when multiple call numbers are attached to a bibliographic record.

Analytic file prefix

The prefix portion of the Classification policy references a special /Unicorn/Custom file outlining the sorting/treatment of dates, volume, issue, and other analytic call number parts for each Classification policy. The file name is the prefix name plus clas.

If a prefix is recognized, Symphony automatically inserts a subfield z in the Symphony call number. Portions of the call number that follow a |Z are considered analytic information, and are fully expanded to enhance sorting of call numbers. Analytic information does not display as part of the base call number that displays at the top of a single item view screen. A |Z can be manually inserted by a cataloger to improve sorting. In printing or displaying call numbers, |Z is replaced with a space.
Preceding year part of analytic

This attribute specifies whether the preceding year will be part of the analytic file prefix. If a Classification policy is defined to include preceding year then after the analytic term is found by using the prefix file, the preceding call number characters are examined. If a two or four-digit number or combination is found before the analytic term, then the analytic subfield (|Z) is inserted before the number.

The following patterns are recognized as years:

07
2007
06/07
06–07
2006/2007
2006–2007
2006/07
2006–07

For example, Preceding Year

The call number in the bibliographic record is as follows:

PN2312 .N37 06-07 PT. 2

When calculating the position in which to insert |Z, if a Classification policy that includes preceding years is used, |Z will be inserted as follows:

PN2132 .N37 |z06-07 PT. 2

If a Classification policy that does not include preceding years is used, |Z will be inserted as follows.

PN2132 .N37 06-07 |zPT. 2
The leading text and substitute text fields are used in combination to create a user-defined call number, rather than the item’s actual call number, for public display. For instance, you would like the term “Periodical,” to display in the OPAC rather than call numbers for your periodical collection.

**Leading text**

This field specifies the leading characters that the text string will replace. You can specify 1-40 leading characters. Typically, the leading characters are XX, unless the library has specified otherwise.

**NOTE**  
This field is case-sensitive. If you specify xx, but the call numbers begin with XX, the text will not be substituted.

**Substitute text**

Substitute text is used in combination with the leading text field to create a user-defined call number for public display, rather than the item’s actual call number.

Use this attribute to specify the replacement string for the leading text. The substitute text can be 1-40 characters in length. If the replacement string consists of only a single blank, no replacement text is supplied; in effect, this suppresses the display of the leading text altogether.

**Note**  
If your library is using iBistro/iLink, your environment files (i.e. system.env) must be modified to allow the Substitution Text to display in the OPAC.
Strip AUTO number

This attribute specifies whether the numeric portion of an auto-generated call number will be stripped. If a call number begins with the characters XX, the numeric portion of the call number that displays after the XX can be suppressed.

Example (Use of Substitution) – A library could create a Classification policy for unclassified periodicals that uses display substitution to suppress automatically generated call numbers from public display. Instead, a different call number would display. The call number of an existing periodical record is as follows:

XX(12365.2)

Using a separate call number for public display, the XX could be replaced with a text string, as follows:

PERIODICAL STACKS(12365.2)

By stripping the automatically generated portion of the call number, the following call number would display to the public:

PERIODICAL STACKS
To add a new classification

If the library has an Electronic Books collection that should be cataloged and whose items should display a call number of EBOOK, create a new Classification policy. The records will contain a Symphony auto-generated call number, but the public will see the substitution text of “EBOOK” where the call number would usually display.

1. On the Cataloging Configuration toolbar, click the Classification wizard. The List policies window appears:

![Classification: List Policies window]

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALPHANUM</td>
<td>Alpha-numeric class scheme</td>
</tr>
<tr>
<td>ASIS</td>
<td></td>
</tr>
<tr>
<td>ATDEWEY</td>
<td></td>
</tr>
<tr>
<td>ATDEWEYLOC</td>
<td></td>
</tr>
<tr>
<td>AUTO</td>
<td></td>
</tr>
<tr>
<td>DEWEY</td>
<td></td>
</tr>
<tr>
<td>LC</td>
<td></td>
</tr>
<tr>
<td>LCPER</td>
<td></td>
</tr>
<tr>
<td>NLM</td>
<td></td>
</tr>
<tr>
<td>ONLINE</td>
<td></td>
</tr>
<tr>
<td>ONORDER</td>
<td></td>
</tr>
<tr>
<td>SUDOC</td>
<td></td>
</tr>
<tr>
<td>UDC</td>
<td>Universal Decimal classification</td>
</tr>
</tbody>
</table>

2. Select Auto, and click Copy. The following window appears:
3. In the **New policy name** box, type **EBOOK**, and click **OK**. The following window appears:

![classification window]

4. In the **Description** box, type **Call number for E-Books**.
5. Retain the **Sort rule**, **Make rule**, and **Analytic file prefix** attributes carried over from the copied AUTO Classification policy.
6. In the **Leading text** box, type **XX**.
7. In the **Substitute text** box, type **EBOOK**.
8. Click the Strip **AUTO number** check box.
9. Click **Save**. The policy changes will take effect after you halt and run the Symphony servers.
Holding Code

A holding code is a short code that represents copy-level information, such as item type and location. Symphony uses the Holding Code policy to provide required copy-level information at the time that the record is loaded. Acquisitions and Serials also use holding codes.

Two Holding Code policies, DEFAULT and UNK, are delivered with Symphony. The DEFAULT Holding Code policy is used to specify a value to use whenever a record with a holdings tag is missing a required subfield, such as |t (item type). The UNK (unknown) Holding Code policy is used to specify a value to use whenever a holdings tag includes a subfield that contains information that is not in Symphony policies.
Holding Code Attributes

Name
This attribute uniquely identifies a specific Holding Code policy.

NOTE
The name of the Holding Code policy is not the code that should actually be typed in the holdings field of the bibliographic record. The code attribute is used for this purpose.

Description
This attribute provides more information about the policy and its use by the library.

Ignore item
This attribute indicates whether the holding code should be ignored when loading records. The records being loaded may contain obsolete holding codes or a holding code of a nonexistent or inactive library.
Code
This attribute must be a unique abbreviation, word, or group of characters that represents all of the characteristics described in the following fields. This holding code is typed in a holdings field of a full USMARC record before the record is captured and loaded into the Symphony catalog database.

Library
This attribute specifies the library ownership of items with this holding code.

Location
This attribute represents the individual area, collection, or room to which items with this holding code are assigned.

Item type
This attribute characterizes the material represented by this holding code. A separate Holding Code policy entry should be made for each type of material.

Item category 1
This optional attribute further characterizes the material. This category allows the collection of statistics by allowing libraries to define their own unique copy-level characteristics in the collection. If you do not want to use this item category, leave it blank.

Item category 2
This optional attribute further characterizes the material. This category allows the collection of statistics by allowing libraries to define their own unique copy-level characteristics in the collection. If you do not want to use this item category, leave it blank.

Circulate
This attribute indicates whether the Circulate check box in the item record should selected or cleared.

Permanent
This attribute indicates whether the Permanent check box in the item record should be selected or cleared.

Price
This optional attribute may be used to supply a default price for all items created with the holding code. The default price is assigned to items in the following situations:
The |c of the 020 (ISBN) field does not contain a price.
The |p of the holdings tag does not contain a price.
To add a new Holding Code policy

Create a new Holding Code policy for Books held in the Juvenile Location of the Main Library.

1. On the Cataloging Configuration toolbar, click the **Holding Code** wizard. The List Policies window appears.
2. Click **Create**.
3. In the **Name** box, type the policy name **ARROWJVBK**.
4. In the **Description** box, type **Arrowood Juvenile Books**.
5. Next to **Ignore item**, make sure the check box is cleared.
6. In the **Code** box, type **ARROWJVBK**.
7. In the **Library** box, select **ARROWOOD** from the list.
8. In the **Location** box, select **CHILDENS** from the list.
9. In the **Item type** box, select **BOOK** from the list.
10. Leave the **Item category 1** attribute blank.
11. In the **Item category 2** list, select **JUVENILE**.
12. Select **Circulate**.
13. Select **Permanent**.
14. Leave the **Price** attribute blank.
15. Click **Save**.
Item Category 1 and 2 Policies

These optional Cataloging category fields denote a copy’s special characteristics for collection management and statistical analysis. The library determines the general purpose of this field and which policy names are allowed. Item categories are used as selection criteria in reports for generating detailed statistical breakdowns by library-defined characteristics.
Language Policy

The Language policy creates synonyms for searching the catalog by language using the lookup options Language field. The Language policy establishes which three-letter codes (used in USMARC records) are equivalent to which spelled out language names. In this way, users can search by language without having to know the three-letter language code used in the MARC catalog record.

This policy also sets a default language for those records that do not contain a language code.
Exercises

Exercise 7

**Scenario:** You want the ISBN (020) tag to appear in the Full Display of monograph records in your OPAC.

**Action:** Add the delivered ISBN (020) entry to the Full Synonym List in the MARC Catalog Format.

Exercise 8

**Scenario:** You would like to be able to search for records by their Local System # (035).

**Action:** Create a new searchable keyword index for 035. Next, add a keyword index variation to the 035 entry in the MARC Catalog Format.
Overview

In this chapter you will learn about report functions and report types. You will also learn about the Report wizard properties, toolbar, wizards, and helpers.

Before You Begin

Before you can view or print finished reports, computers where WorkFlows is installed must have a temporary folder (usually C:\temp).

To verify that you have a temp folder in the C drive directory, go to Windows Explorer. If you do not have a temp folder, you will need to create one. To do this, go to the File menu and click New, and then click Folder. Name the new folder Temp.
Report Functions

SirsiDynix defines reports to include any process that can be scheduled in Symphony. Reports in Symphony WorkFlows can improve the functioning of a library. You can perform the following tasks more easily with reports.

- Track statistical and management information by counting various staff processes to measure productivity, identifying items that are likely candidates for weeding, or tracking fund information for budgeting.

- Streamline daily library processes by creating bibliographies, sending overdue notices to users, comparing the catalog shelf list to the items on the shelf, or generating vendor claim lists or orders.

- Perform housekeeping tasks by updating catalog indexes, changing the status of groups of users, or removing users or items in batches when necessary.

Symphony reports are organized into general groups, with specific report types in each group. Although you can use many reports as they are, you can tailor a basic report to meet your specific needs.

Once you select a report and have made formatting decisions, the report can be scheduled to run immediately, periodically, or saved as a report template to be run later. Reports can be printed, e-mailed, viewed, or saved as a text file (usually in WordPad).
Session Settings

All report wizards—Schedule New Reports, Scheduled Reports, and Finished Reports—use the same properties page, set in the **Session Settings** wizard on the Reports toolbar. Symphony retains modifications made to the properties for all wizards for the duration of the WorkFlows session.
Review Settings Each Session

This attribute determines whether the session settings will display the first time a Reports wizard is used in the WorkFlows session.

Application to view reports

When you click View, the program entered in this field is started to view templates, scheduled reports, and finished reports. The report displays in the document window, and can be printed or saved from the application.

If the program you want is not installed in the C:\Program Files\Windows NT\Accessories directory, you must type the full path to the executable file. If needed, you can locate the executable for the application using the Open File gadget.

Setup & Schedule

Display report source column

This attribute determines whether the report source name (such as Bibload) will appear in the Source column of the report tab.

Notify owner when report is finished

Select this check box to send a brief e-mail to the owner of the report after it is complete and available for viewing from the finished list, or has been printed or e-mailed. For a user to be notified, an email address needs to be entered into the EMAIL entry of the primary address of the user login scheduling the report. The e-mail address that appears in the From field of the e-mail is the login or e-mail address of the user who last ran the report server.

Send notices automatically

This field applies to notice reports only. You must define an e-mail address in the appropriate field of the user record for notices to be automatically sent.

If you select the send notices automatically option, you can specify the recipients below.
**View, Print, or Email Finished Reports**

**Format report**
Select this check box to invoke default formatting specific to each report, such as headers, spacing, and page breaks. In some cases, it may be beneficial to display a report unformatted, and then format it using word processing software.

**Include log**
If selected, this attribute includes the log when distributing printed or e-mailed report results. The log is a detailed description of the formatting options used, and of how selection criteria affected the results.

Some reports are wholly contained within the log and an attempt to distribute one of these reports as results will send a header-only message to the e-mail recipient or an illegible message to the printer. The log is always available from the finished list.

**Include results**
Select this check box to include the results when distributing printed or e-mailed report results. The results include the primary text of the report.

---

**NOTE**
These log and result settings carry over to the selections when working with finished reports. An option is available to change these settings before viewing, e-mailing, or printing the report.

---

**Display format page**
Select this option if you print multiple character sets, send your work to a printer other than your default, or if you print reports that are output in a nonstandard page size. This option displays the Change format button on the Schedule window when you use the Schedule New Reports wizard.
If display format page is selected, a Change format button displays prior to displaying a finished report.

**NOTE**  If you select the display format page property, you have the option to change the setting for formatting the finished report before viewing, emailing, or printing the report.
Format Page

The format page includes the character set used, page length and width, and the top and bottom margins.

Character set table – Verify that DEFAULT is the appropriate value. This defines the character set used to translate formatted reports. Only formatted reports use this character set. The default value is appropriate for most systems except Chinese.

Page length – Number of lines on the page.

Page width – Number of characters in each line.

Top/Bottom margin – Line size of the top and bottom margins.

View, Print, or E-mail Finished Notice Reports

Recipients

If you select the Send Notices Automatically option, you can specify the users (recipients) who will automatically receive notices based on the e-mail address included in the user record. If notices are sent automatically, you may want to separate e-mail and non e-mail recipients to prevent sending duplicate paper notices, particularly if the Count as Notice Sent option is used to keep track of the notices each user received. You have three options for recipients.

- All
- Only those with email addresses
- Only those without email addresses

Notes

- You can change the setting for Format Finished Report before viewing, e-mailing, or printing the report.
- Log and result settings carry over to the selections when working with finished reports.
Schedule New Reports Wizard

The Schedule New Reports wizard creates new reports.

Templates

When you use the Schedule New Reports wizard, the Templates tab displays a list of reports based on generic SirsiDynix-delivered reports that were modified and/or saved as templates by library staff. If there are no report templates saved, the tab does not display.
You should save a report as a template under the following circumstances:

- If the report is needed one or more times in the future, but you do not want it to run automatically at a specified date and time.
- If you want to run a series of similar reports, changing only one or two selections or output options at a time.

**To save a report as a template to be used later**

1. On the Reports module toolbar, Click the Common Tasks toolbar, and then click the Schedule New Reports wizard.
2. Select a report to be scheduled that is most like the report you want.
3. Click Setup & Schedule.
4. Make any changes to the report.
5. Click Save As Template to place the report that you created into the Templates tab of the Schedule New Reports wizard.
6. A confirmation message appears. Click OK to return to the report groups.

**NOTE** You must schedule the report to run using the Schedule New Reports wizard. The report template that you just created will not run without scheduling the new report.
Schedule New Reports

1. Click the **Schedule New Reports** wizard. The Display Template Reports window appears.

2. On the Templates tab, select a template (or select a generic Symphony report from another tab) that you want to base the new report on, and click **Setup & Schedule**. The Schedule New Reports window appears.

3. Define any format information to be included in the report.

4. Click **Schedule** to select a schedule and printing/distribution for the report. Select the time to run the report and the appropriate printing/distribution option. Click **Schedule**.

   -Or-

   If the report is to run only one time, click **Run Now** to accept the defaults and set the report to run ASAP.

   A confirmation window appears.

5. Click one of the following options:
   - **Schedule a New Report** to return to the Display Template Reports window.
   - **Display Scheduled Reports** to view the list of scheduled reports.
   - **Display Finished Reports** to view the list of finished reports.
   - **Close** to close the Schedule New Reports wizard.
Basic Tab

Every report has the same Basic tab. The following fields may have default values, but they can be edited.

**Report name**

This name displays in the finished or scheduled report lists. If left unchanged, it is also the name displayed in the new report or template list.

**Description**

This field describes the report results. The default value describes the report if it runs without making any changes to selections or output options.

**Title**

The title in this field displays on the first line of each formatted page of the printed report. The date and time that the report was produced follows the title.

**Footer**

When used, this optional field displays on the last line of each formatted page of the printed report. It can be used to record a date or range of dates that a report covers.

---

**NOTE**

In a multi-library setting where multiple staff members run the same types of reports, it is helpful to modify information in the Basic tab. For example, Jack and Jill run the List Items report on a regular basis. They configure the reports differently for their respective libraries. Changing information on the Basic tab makes it easier to distinguish reports from one another.
Selection Criteria

Making selections in the tabs associated with a particular report limits the amount of data that will be output in this report. The List Items report, for example, is used to output information about item records in the catalog. Before any selections are made in the Copy Selection tab, the report is set up to list every item record in the catalog. Because this is impractical output, you should make selections to only output a subset of all item records, for example—the output could contain all records that have a last activity date earlier than 2 years ago.

Keep in mind that it is not necessary to make selections in every available field on the tabs.
Sorting Tab

This option is available in some reports, particularly lists and notices, when it may be beneficial to have various options for sorting report results. To make sorting selections, you can use the Sorted by list. The Sorted by options vary by report.

Value Modification

This option is available in a few reports, like the Move Collection Items report, that make changes to records in your database.
Report Output

Based on available output options, the appearance and content of Symphony reports can vary significantly. Selections along with output options are used to design a custom report to meet individual library needs.

Options in this phase of the report influence what information is included in the printed report results and in what format. Most report results default to include general information that can be expanded by making more selections on the available output tab, such as Print Item, Print Invoice, and others.
Scheduling a Report

Once you have made appropriate selections within a report, you may schedule it to run immediately, once in the future, daily, weekly, or monthly.

ASAP

Click ASAP to run the report immediately.

Once

Click Once to run the report one time in the future. A calendar appears. Select the date on which the report will run.
Daily

Click **Daily** to run the report every day or every x number of days. Use the calendar to select the date on which the report will start running.

Weekly

Click **Weekly** to run the report on a specific day or multiple days of the week (for example, Mondays, Wednesdays, and Fridays). Use the calendar to select the date on which the report will start running.
Monthly

Click Monthly to run the report on a specific date or multiple dates in the month (for example, the first and fifteenth of every month). Use the calendar to select the date on which the report will start running.
To schedule the List Bibliography Report

To run the List Bibliography report to list items in the Juvenile location with “Science Fiction” in the Subject of the bibliographic record, follow these steps:

1. On the Reports module toolbar, click the Common Tasks toolbar, and then click the Schedule New Reports wizard.
2. Click the Bibliographic tab.
3. From the list, double-click List Bibliography.
4. On the Basic tab, in the Report name box, change the name of the report to “Juvenile Sci-Fi Bibliography.”
5. Click the Search String tab.
6. Click the Search string gadget, and type science fiction{SU} in the search string box. Click Add, and then click OK.
7. Click the Copy Selection tab.
8. Click the Home location gadget. Verify that the Contains selected policies option is selected.
9. In the List to choose from, click JUV. Click the right arrow to move the entry to the List selected, and click OK.
10. Click the Sorting tab and select the desired sort option.
11. Click Print Item tab to configure the output of the list. To explore the choices presented on the Print Item tab, click the Help wizard on the Common Tasks toolbar.
12. After selecting the output options, click Schedule.
13. Accept the default scheduling (ASAP), and click Schedule.
# Required Maintenance Reports

Suggested Order of **Required** Maintenance Reports for Windows Servers at GL3.1

<table>
<thead>
<tr>
<th>GROUP</th>
<th>NAME</th>
<th>DESCRIPTION</th>
<th>SUGGESTED SCHEDULE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text</td>
<td>Add, Delete, Update Databases (adutext)</td>
<td>Updates the keyword and browse indexes for bibliographic data. Plays a role in authority control.</td>
<td>12:05AM Daily</td>
</tr>
<tr>
<td>Text</td>
<td>Add, Delete, Update User (aduusertext)</td>
<td>Run adds, deletes, and updates to user text database.</td>
<td>12:10AM Daily</td>
</tr>
<tr>
<td>Administration</td>
<td>Consolidate Daily Logs (consolidate)</td>
<td>Changes multiple daily log files into single monthly log files and compresses them.</td>
<td>12:15AM Daily</td>
</tr>
<tr>
<td>Administration</td>
<td>Statistics Log (statlog)</td>
<td>Extracts circulation transactions from history log and builds statistics transactions.</td>
<td>12:20AM Daily</td>
</tr>
<tr>
<td>User</td>
<td>Update User Delinquency Status (setdelinq)</td>
<td>Flags overdue items. Evaluates users and edits their status in accordance with library policies. Updates estimated fines in charge records.</td>
<td>2:00AM Daily</td>
</tr>
<tr>
<td>Text</td>
<td>Reorganize Text Dictionary (reorgtext)</td>
<td>Reorganizes keyword indexes to make them smaller and more efficient.</td>
<td>2:30AM Weekly Saturday</td>
</tr>
<tr>
<td>Text</td>
<td>Reorganize User Text Dictionary Report (reorgusertext)</td>
<td>Reorganizes user text dictionaries for all indexes to make them smaller and more efficient.</td>
<td>2:30AM Weekly Sunday</td>
</tr>
</tbody>
</table>

* When authority control is turned on
# Suggested Order of Required Maintenance Reports for Unix Servers at GL3.1

<table>
<thead>
<tr>
<th>GROUP</th>
<th>NAME</th>
<th>DESCRIPTION</th>
<th>SUGGESTED SCHEDULE TIME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration</td>
<td>Backup Daily Files (dailybackup)</td>
<td>Makes a backup of a log of all transactions that have changed databases in the current month. Be sure that the appropriate tape is in the tape drive when you run the report.</td>
<td>12:05AM Daily</td>
</tr>
<tr>
<td>Administration</td>
<td>Statistics Log (statlog)</td>
<td>Extracts circulation transactions from history log and builds statistics transactions.</td>
<td>12:10AM Daily</td>
</tr>
<tr>
<td>Text</td>
<td>Add, Delete, Update Databases (adutext)</td>
<td>Updates the keyword and browse indexes for bibliographic data. Plays a role in authority control.</td>
<td>12:15AM Daily</td>
</tr>
<tr>
<td>Text</td>
<td>Add, Delete, Update User (aduusertext)</td>
<td>Run adds, deletes, and updates to user text database.</td>
<td>12:20AM Daily</td>
</tr>
<tr>
<td>User</td>
<td>Update User Delinquency Status (setdelinq)</td>
<td>Flags overdue items. Evaluates users and edits their status in accordance with library policies. Updates estimated fines in charge records.</td>
<td>2:00AM Daily Must run after materials become due, usually 11:59AM.</td>
</tr>
<tr>
<td>Text</td>
<td>Reorganize Text Dictionary (reorgtext)</td>
<td>Reorganizes keyword indexes to make them smaller and more efficient.</td>
<td>2:30AM Weekly Saturday</td>
</tr>
<tr>
<td>Text</td>
<td>Reorganize User Text Dictionary Report (reorgusertext)</td>
<td>Reorganizes user text dictionaries for all indexes to make them smaller and more efficient.</td>
<td>2:30AM Weekly Sunday</td>
</tr>
<tr>
<td>Administration</td>
<td>Consolidate Daily Logs (consolidate)</td>
<td>Changes multiple daily log files into single monthly log files and compresses them.</td>
<td>1:00AM Monthly on the 2nd (see note **)</td>
</tr>
</tbody>
</table>

* When authority control is turned on

** If your Unix site runs Backup Daily Files, run Consolidate Daily Logs only on the second day of the month about 01:00. If your Unix site does not run Backup Daily Files, run Consolidate Daily Logs daily before the Statistics Log.
NOTE For a complete list of reports, see the “Schedule Frequencies for Required and Recommended Reports” topic in the Help file. Sites with Hyperion and sites using iBistro/iLink will need to run additional reports not listed above.

Reports Maintenance

Monitoring the Status of Required Maintenance Reports

Each day a staff member should verify that the following required maintenance reports ran without error.

- Add, Delete, Update Databases
- Add, Delete, Update User
- Update User Delinquency Status
- Statistics Log
- Backup Daily Files (Unix)
- Consolidate Daily Logs (Windows)
- Reorganize Text Dictionary (this report only runs once a week)
- Reorganize User Text Dictionary (this report only runs once a week)

To monitor the status

1. On the Reports module toolbar, click the Common Tasks toolbar, and then click the Finished Reports wizard. The Display Finished Reports window appears:
2. Note the **Status** column. There are two report statuses:

- **OK** – Indicates that the report was finished.
- **Error** – Indicates that the report was unable to finish. Do not remove this report. If this status displays for a required maintenance report, notify SirsiDynix Client Care.

<table>
<thead>
<tr>
<th>Report name</th>
<th>Owner</th>
<th>Status</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update User Delinquency Status</td>
<td>SIRSI</td>
<td>OK</td>
<td>11/27/200...</td>
</tr>
<tr>
<td>Statistics Log</td>
<td>SIRSI</td>
<td>OK</td>
<td>11/27/200...</td>
</tr>
<tr>
<td>Consolidate Daily Logs</td>
<td>SIRSI</td>
<td>OK</td>
<td>11/27/200...</td>
</tr>
<tr>
<td>Add, Delete, Update Databases</td>
<td>SIRSI</td>
<td>OK</td>
<td>11/27/200...</td>
</tr>
<tr>
<td>Update User Delinquency Status</td>
<td>SIRSI</td>
<td>OK</td>
<td>11/26/200...</td>
</tr>
<tr>
<td>Statistics Log</td>
<td>SIRSI</td>
<td>OK</td>
<td>11/26/200...</td>
</tr>
<tr>
<td>Consolidate Daily Logs</td>
<td>SIRSI</td>
<td>OK</td>
<td>11/26/200...</td>
</tr>
<tr>
<td>Add, Delete, Update Databases</td>
<td>SIRSI</td>
<td>OK</td>
<td>11/26/200...</td>
</tr>
<tr>
<td>Update User Delinquency Status</td>
<td>SIRSI</td>
<td>OK</td>
<td>11/25/200...</td>
</tr>
<tr>
<td>Statistics Log</td>
<td>SIRSI</td>
<td>OK</td>
<td>11/25/200...</td>
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<td>SIRSI</td>
<td>OK</td>
<td>11/25/200...</td>
</tr>
<tr>
<td>Add, Delete, Update Databases</td>
<td>SIRSI</td>
<td>OK</td>
<td>11/25/200...</td>
</tr>
</tbody>
</table>
Viewing Selected Reports

Even when the status is OK, you should review the logs of the following finished maintenance reports, and search report logs for the words “error” and “abnormal.”

- Add, Delete, Update Databases
- Reorganize Text Dictionary
- Add, Delete, Update User
- Reorganize User Text Dictionary

To view finished reports

1. On the Reports toolbar, click the Finished Reports wizard. The Display Finished Reports window appears.
2. Select the report you want to view, and then click View. A View Finished Reports window appears.
3. Select the View log check box, and click OK. The selected finished report will open in WordPad or another designated word processing program.
4. Scan report logs for the words “error” and “abnormal.”
If a required maintenance report has a message that indicates a possible problem, do not remove the report from the Finished List. Contact SirsiDynix Client Care and describe the situation.

💡 You can use the word processing program's **Find** feature to search for the word “error” or “abnormal.”

### Removing Finished Reports

Follow these guidelines when removing unneeded finished reports.

- Every week, remove unneeded finished reports to recover disk space and reduce clutter.
- Remove finished maintenance reports, as well as unneeded finished reports run by staff.
- When removing finished maintenance reports, retain reports dated from the latest two days in the list. If subsequent reports run in **ERROR**, SirsiDynix Client Care may want information from the reports finished in the few days before the error.
- Do not remove a maintenance report that is the subject of a SirsiDynix Client Care incident until the incident is resolved.
- Remove all finished reports over two weeks old.
CAUTION Once you remove a report from the list of Finished Reports, you cannot retrieve it.

To remove a finished report

1. On the Reports module toolbar, click the Common Tasks toolbar, and then click the Finished Reports wizard. The Display Finished Reports window appears.

2. Select the report you want to remove, and click Remove. The Remove Finished Reports window appears:

3. Click the check box of each additional report you want to remove.
4. Click **Remove** or **Remove All**.

- **Remove** – Removes each report you selected one by one. A Confirmation window appears for each report you selected. Click **Yes** to remove the report, or click **No** to retain the finished report.

- **Remove All** – Removes all selected reports. If you choose to remove the reports, WorkFlows returns a Confirmation message indicating how many reports were removed. You will not receive an individual Confirmation window for each report. Click **OK** to close the message window.
Administrative Reports

Transaction Statistics Report

The Transaction Statistics report (statistics) selects statistical and demographic information about item and user transactions. Information is presented in a tabular format. The most popular use for this report is to report the number of items circulated within a period. This report is in the Administration Reports group.

**Transaction date range**

The transaction date range determines the period queried to produce the output of the report. You can set up a Transaction Statistics report that runs the first of every month and covers the previous month's transactions. For example, the report is run May 1 for April 1-30 transactions. To gather statistics for the previous month, the transaction date range should be set up to start 1 month before the report run date and end 1 month before the report run date. This will include transactions for the entire month previous to the month of the report run date.

**Date Range Gadget**

Among the many useful helpers and gadgets the Report module offers is the Date Range gadget. You can use the Date Range gadget to select a date based on a fixed or sliding date range for the selection.
The first option is the fixed date, that is, the date or date range is based on a specific date. This option is used most often, particularly in reports that are scheduled ASAP or saved as a template.

Use the **Date depends on the report run date** helper to select a sliding date.

![Gadget: Date Range](image)

The sliding date depends on the report run date. It is useful for reports scheduled to run periodically. This helper allows the report to select a date range based on the date the report runs. Consequently, a scheduled report that runs monthly pulls data for the previous month’s activity without having to make changes to the report’s selection criteria.
**Commands**

The commands you select depend on the type of transaction you want to count. To count the previous month’s checkouts and renewals, use the Policy List gadget to the right of the **Command** field. In the **List to Choose From**, select **Charge Item Part B**, **Renew Item**, and **Renew User Part B**. To include the number of in-house uses, select the **Use Item** command.

---

**NOTE**

For more information on Commands, see the WorkFlows online Help topic for the Transaction Statistics report.

---

**Library (Transaction Selection)**

Use if a library in a multi-library system wants report results to reflect only transactions that took place at their library.

**Interface (Transaction Selection)**

Use if you want to select a particular interface. For example you could look at the number of renewals in the OPAC.

**Transaction Statistics Tab**

The Transaction Statistics tab is used to select how transactions are presented within a column/row format. A helpful presentation is a column and row breakdown by Item Type and User Profile.

To ensure that all transactions are counted in the output, schedule any Transaction Statistics reports to run after running daily maintenance reports and backups.
Sample Transaction Statistics Report

<table>
<thead>
<tr>
<th>Item type</th>
<th>User profile</th>
<th>ADULT</th>
<th>FACULTY</th>
<th>GRADSTNDT</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>AV</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>AV-EQUIP</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>BOOK</td>
<td></td>
<td>13</td>
<td>16</td>
<td>5</td>
<td>34</td>
</tr>
<tr>
<td>CD</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>CD-DVD</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>CHAIR</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>EQUIPMENT</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>ILL-BOOK</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>LAPTOP</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>MAGAZINE</td>
<td></td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>MOVIE</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>NEWSPAPER</td>
<td></td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>RECORDSKMB</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>ROOM</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>UNKNOWN</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>VIDEO</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td>13</td>
<td>18</td>
<td>6</td>
<td>37</td>
</tr>
</tbody>
</table>
Scan History Logs Report

The Scan History Logs report (Logscan) extracts statistical information from historical data. This report prints information from one of four types of logs – History, Print, Statistics, or System.

In this report’s selection criteria, you specify a search string such as an item or user barcode.

The report prints the details of all the transactions in the specified date range containing the text specified by the user.
Sample Scan History Logs Report

Log Listing
Produced Thursday, December 11, 2003 at 2:27 PM

09/26/2003, 11:56:50 Station: 0005 Request: Sequence #: 02 Command: Edit Item
Part B
user access: ADMIN clearance: NONE station library: ROCKEFELLR item ID: 8876-2003
  call number: PZ8.3 .G276 GR copy: 1 last modified by: ADMIN type: BOOK year
  of publication: 1960 record format: MARC item cat1: item cat2: JUVENILE media
desk name for item:

Part B
user access: ADMIN clearance: NONE station library: ROCKEFELLR item ID: 8876-2003
  call number: PZ8.3 .G276 GR copy: 1 last modified by: ADMIN title key: l6001349
  3 type: BOOK year of publication: 1960 record format: MARC item cat1: item
  cat2: JUVENILE media desk name for item:

11/25/2003, 14:10:45 Station: 0005 Request: Sequence #: 47 Command: Charge Item
Part B
user access: ADMIN clearance: NONE station library: ROCKEFELLR item ID: 8876-2003
  call number: PZ8.3 .G276 GR copy: 1 operator ID: ADMIN user ID: 50764010015220

Privatized Datacode List Report

CAUTIONS! This report will remove user information from the history logs. Once this information has been removed, the history log cannot be used to restore information to the database. See the list of datacodes processed by this report in the following help topic. This report should only be run after a full system backup.

This report is password protected. If you do not know the password, see your supervisor.

The Privatized Datacode List (private) report is used by Symphony administrators to remove user information (user ID, alt ID, and name) from history logs, and replace this information with generic constants.

Additionally, the report includes an option for clearing the last user key (internal record number) from selected item records. The object is to avoid preserving information about what items a specific patron has checked out in the past. This report protects your patrons' privacy without affecting the library's ability to gather statistics on circulation transactions.
With this report, you will be able to make the following selections.

- A list of commands to privatize
- A date range of history logs to process
- A selection of items (title, call number, and item selections) for which to clear the last user key

Note: It is possible to run this report in a test mode without editing the database (which is recommended), so that you can determine how many items will be updated by this report. If you run the report with the update option selected, data from the history logs will be removed.

History log with specific user IDs before the Privatized Datacode List report is run:

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Station</th>
<th>Request</th>
<th>Sequence</th>
<th>Command</th>
<th>User Access</th>
<th>Station Library</th>
<th>Clearance</th>
<th>User ID</th>
<th>Item ID</th>
<th>Call Number</th>
<th>Client Type</th>
<th>Log Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/15/2006</td>
<td>15:41:23</td>
<td>0005</td>
<td>Charge Item</td>
<td>28</td>
<td>Charge Item</td>
<td>SIRSI</td>
<td>ROCKEFELLR</td>
<td>NONE</td>
<td>717</td>
<td>15309-1001</td>
<td>796.357</td>
<td>see client_types.h</td>
<td>200000</td>
</tr>
<tr>
<td>11/15/2006</td>
<td>15:41:39</td>
<td>0005</td>
<td>Charge Item</td>
<td>44</td>
<td>Charge Item</td>
<td>SIRSI</td>
<td>ROCKEFELLR</td>
<td>NONE</td>
<td>716</td>
<td>15311-1001</td>
<td>796.357</td>
<td>see client_types.h</td>
<td>200000</td>
</tr>
<tr>
<td>11/15/2006</td>
<td>15:41:57</td>
<td>0005</td>
<td>Charge Item</td>
<td>59</td>
<td>Charge Item</td>
<td>SIRSI</td>
<td>ROCKEFELLR</td>
<td>NONE</td>
<td>719</td>
<td>15310-1001</td>
<td>796.357</td>
<td>see client_types.h</td>
<td>200000</td>
</tr>
</tbody>
</table>
History log with specific user IDs stripped after the Privatized Datacose List report is run:

Log Listing
Produced Wednesday, November 22, 2006 at 3:34 PM

station login user access:SIRSI station library:ROCKEFELLER station login clearance:NONE station user's user ID:PRIVATE item ID:15309-1001 user ID:PRIVATE
call number:796.357 Client type: see client_types.h for values:3
Max length of transaction response:200000  ^X:0

11/15/2006,15:42:10 Station: 3005 Request: Sequence #: 35 Command: Create Hold
station login user access:SIRSI station library:ROCKEFELLER station login clearance:NONE station user's user ID:PRIVATE user ID:PRIVATE user alternative ID:PRIVATE item ID:15309-1001 call number:796.357 copy number:1 recall status:NO hold range:SYSTEM hold position:N hold reserve flag: N hold type:TITLE hold pickup library:ROCKEFELLER Client type: see client_types.h for values:3 Max length of transaction response:200000  ^X:0

station login user access:SIRSI station library:ROCKEFELLER station login clearance:NONE station user's user ID:PRIVATE item ID:15309-1001 call number:796.357 copy number:1 holds block override: SUPER item lost: override:
List Policies Report

The List Policies (Listpol) report prints all current policies on your system. There are neither selections nor output options to make. This report provides an overview of multiple policy values at once. It is also helpful in determining the policy numbers for environment policies that are used when customizing iBistro or iLink.

Sample Portion of a List Policies Report

<table>
<thead>
<tr>
<th>NAME</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. UNLIMITED</td>
<td>Charged out for an unlimited period of time</td>
</tr>
<tr>
<td>2. NON-CIRC</td>
<td>Material does not circulate</td>
</tr>
<tr>
<td>3. OVERNIGHT</td>
<td>Overnight loan</td>
</tr>
<tr>
<td>4. RECALL</td>
<td>Recall period</td>
</tr>
<tr>
<td>5. RESHELVE</td>
<td>Reshelving period</td>
</tr>
<tr>
<td>6. 2HOUR</td>
<td>Circulates for 2 hours</td>
</tr>
<tr>
<td>7. 7DAY</td>
<td>Circulates for 7 days</td>
</tr>
<tr>
<td>8. 14DAY</td>
<td>Circulates for 14 days</td>
</tr>
<tr>
<td>9. 30DAY</td>
<td>Circulates for 30 days</td>
</tr>
<tr>
<td>10. SEMESTER</td>
<td>Circulates until the end of semester</td>
</tr>
<tr>
<td>11. 28DAY</td>
<td>Circulates for 28 days</td>
</tr>
<tr>
<td>12. MONDAY</td>
<td>Due Monday</td>
</tr>
<tr>
<td>13. ANNUAL</td>
<td>Due at the end of year</td>
</tr>
<tr>
<td>14. 1DAY</td>
<td>Circulates for 2 days</td>
</tr>
</tbody>
</table>
General Reports

Holds Maintenance

SirsiDynix recommends the following reports for proper holds maintenance. All of these reports are in the Circulation group of reports.

<table>
<thead>
<tr>
<th>Recommended Report Name</th>
<th>Suggested Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>List Onshelf Items with Holds</td>
<td>Daily</td>
</tr>
<tr>
<td>Expire Holds</td>
<td>After midnight (Frequency varies according to hold activity, monthly is average)</td>
</tr>
<tr>
<td>Expire Available Holds</td>
<td>Daily</td>
</tr>
<tr>
<td>Clean Holds Shelf</td>
<td>After midnight after Expire Holds (Frequency varies according to hold activity, monthly is average)</td>
</tr>
<tr>
<td>Purge Inactive Holds</td>
<td>After midnight, after all of the previous reports have been run (Frequency varies according to hold activity, monthly is average)</td>
</tr>
</tbody>
</table>

**NOTE** You will need to fill in the Days for holds to expire and the Days for available holds to expire attributes in the library policy so you can run the Expire Holds and the Expire Available Holds reports with defaults.

List Onshelf Items with Holds

If your library allows users to place holds on materials on the shelf, schedule the List Onshelf Items with Holds report (Pullonshelfhld).
This report produces a list of items that are qualified to satisfy a hold and are available to be picked up somewhere in the library system. The following conditions must be met to be available to be picked up.

- The item must currently be available for circulation (Circulate check box is enabled in the copy).
- The item must not already be available for another hold (cannot have a hold status AVAILABLE).
- The item must not be on reserve.
- The items current location must be Holdable.
- The items current location cannot be in the list of holdable locations excluded in the Selection phase.

The items can then be pulled by library staff to fill holds using the Trap Holds wizard on the Holds Information and Maintenance toolbar in the Circulation module. Only ACTIVE holds will be selected. The Circulation Map is also consulted, and only copies that can be checked out by the user placing the hold are selected.

---

**NOTE**  
If you want to produce a separate report for each library and email those reports, the user record representing the library must have an email address listed in the primary address field. This option is also available for the Clean Hold Shelf report.
**Expire Holds**

The Expire Holds report (Expireholds) helps staff manage expired holds. The report selects ACTIVE holds and blanket holds for which the hold expiration date has passed, and sets the hold status to INACTIVE with a hold inactive reason of EXPIRED.

Symphony sets the hold expiration date when a hold is created. By default, holds are selected that have expired before the report run date, as long as the user has never been notified of a hold cancellation for the material.

![Schedule New Reports: Schedule Expire Holds](image)

**NOTE**  If your system is configured to use Demand Management, only the Copy and Title options display for Level. If no value is selected, all levels are included.
**Clean Holds Shelf**

Occasionally, after a hold has become available on the holds shelf, a user will cancel a hold in the OPAC, or staff will remove a hold without removing it from the holds shelf. The Clean Holds Shelf report (Cleanholdshelf) generates a list of INACTIVE holds that need to be cleared from the holds shelf because the holds no longer exist.

When the report is run, the INACTIVE hold is changed from AVAILABLE to UNAVAILABLE. The item's current location is set to its home location, and it can be re-shelved.
Purge Inactive Holds

The Purge Inactive Holds report (Purgeholds) selects INACTIVE holds and INACTIVE blanket holds, and purges them from the system. The INACTIVE hold status is selected by default, and cannot be modified, so only inactive holds can be deleted. The Purge Holds report cannot remove AVAILABLE holds waiting to be made unavailable by the Clean Holds Shelf report. Typically, you would select holds that were made inactive before a certain date, or were made inactive for a certain reason.

It is good practice to run the Expire Holds and Clean Holds Shelf reports to extract all of the relevant data from INACTIVE holds before running this report to purge them from the system.

Remove Users Report

CAUTION It is possible with this report to remove all of the users from your system if the appropriate selections are not made. For that reason, it is recommended that you run this report only after you have run a full system backup.

This password-protected report on the User tab removes users based on selections you make with regard to user record or user status. In addition, it is good practice to run a List Users report first, with the same selections you will make in the Remove Users report (Remuser). This will print a list of users that will be removed with the Remove Users report.

To schedule the Remove Users report to remove users from your system who have not had any circulation activity for a certain period of time, click the Last Activity Date gadget to select a period before or after a specific date.
Assumed Lost Report

The Assumed Lost report (Assumedlost) defines the number of days an overdue item is considered lost. Selected overdue items are marked Assumed Lost by changing their current location to LOST-ASSUM. In addition, the report adds a bill to the patron record for the replacement cost of the item and generates notices for the patrons, notifying them that the item is assumed to be lost.

The replacement cost is either the price of the item, or can be derived from the Default Price policy (Cataloging Configuration). The Default Price policy sets the default price for an item by item type and library. The Default Price policy also lets you determine if a processing fee is added to the patrons account and if the processing fee is automatically removed with the lost bill when the lost item is returned to the library.

In the selection phase, specify how many days an item must be overdue before it is marked as Assumed Lost. By default, this value is set to select any charges with a date due that falls at least 45 days before the report run date. This report is in the Circulation group of reports.
### Schedule New Reports: Schedule Assumed lost report

<table>
<thead>
<tr>
<th>Sorting</th>
<th>Undate Option</th>
<th>Charge Notice</th>
<th>Long Overdue Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Copy Selection</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>User Selection</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>User Status Selection</td>
<td></td>
</tr>
</tbody>
</table>

- **Library:**
- **Current location:**
- **Date charged:**
- **Date due:** D-45
- **Overdue:** Yes, No, Both
- **Accrued fine:**
- **Date renewed:**
- **Number of renewals:**
- **Date claims returned:** NEVER
- **Date recalled:**
- **Date notice sent:**
- **Number of overdue notices:**
- **Number of recall notices:**
- **Circulation rule:**
- **Status:** active, inactive, history
- **Date discharged:**
- **Discharge library:**
Sample Assumed Lost Mailer

Thursday, February 26, 2004

E. A. Arrowood Foundation Library
1276 N Warson
St. Louis, MO
63132

Kevin Meacham

Dear Kevin Meacham,

The following Library materials are assumed lost. You are sent the following bills. Thank you.

501 excuses to play golf / by Justin J. Exner.
Exner, Justin J.
1 call number:GV967 .E98 2004
ID:31000234597274
due:1/2/2004,23:59
price:$25.00
processing fee:$5.00

Process Long Overdue Items Report

The Process Long Overdue Items report is used primarily for items that are excessively overdue, and the library does not expect the items to be returned. Since the items are still connected to a user record, the items cannot be removed from the catalog. This report breaks the charge connection allowing for the removal of the items from the catalog.

The report selects items that have been overdue for some time, discharges them, moves them to a special location for later removal, removes the lost item bill (if any), and notes in the user record which titles have been moved. The note added to the Lost item extended information entry is the only connection that will remain between the user and the lost item after the report runs. A user’s record who has had items moved by this report:
After you make selections for the item, a new location to which the items will be moved needs to be identified. The default value is LONGOVRDUE, but a different location can be selected based on the library’s need (such as DISCARD).

The report includes the additional options of creating a bill for the user to include the price of the item, a processing fee, and the accrued fine(s) on the item(s), and/or BARRING the user from any more circulation privileges. Since this report does not produce bill notices, you must run a bill notice type report (such as the Generalized Bill Notices report) to notify patrons that they have been billed.
Sample Process Long Overdue Items Report

Example Sample Log and Result for an Update Report

Report Log for Long Overdue Items Moved
Report 'longoverdue' scheduled as Process Long Overdue Items
Move long overdue items to new location, with options to bill and/or BAR patrons.
UNICORN charge selection v2003.1 started on Thursday, May 27, 2004, 8:59 AM
  The charge file will be read sequentially by primary key.
  The user key will be written to standard output.
  The item key will be written to standard output.
  The charge library will be written to standard output.
  The date-time due will be written to standard output.
  Charges will be selected if the date due is 1/31/2004.
  Charges will be selected if library is not MADISON.
  142 charge record(s) considered.
  4 charge record(s) selected.
UNICORN charge selection finished on Thursday, May 27, 2004, 8:59 AM
UNICORN user selection v2003.1 started on Thursday, May 27, 2004, 8:59 AM
  The user key will be read from standard input.
  The user name key will be written to standard output.
  The user ID will be written to standard output.
  The user name is written to standard output.
  4 user record(s) considered.
UNICORN user selection finished on Thursday, May 27, 2004, 8:59 AM
Discard Process

You can use the following reports on the Bibliographic tab to discard items in Symphony:

- Set Items to DISCARD (password-protected)
- Convert DISCARD Items
- Remove DISCARD Items (password-protected)

Set Items to DISCARD Report

To prepare items to discard based on catalog, call number, and item characteristics, use the Set Copies to DISCARD report (Set discard). This report changes the current location of the selected items to DISCARD. The report's selection process automatically disqualifies copies with bills, charges, or copy holds from being selected for removal.

Click the Home locations gadget and select A Home location selection is required in this report. This prevents setting all the records in the database to DISCARD.
By default, this report does not update selected records. However it prints a list of items that will be modified. Click the **Update database records** check box, if you do not want to print the list of changed items.
Convert DISCARD Items Report

The Convert DISCARD Items report (Cvtdiscard) located on the Bibliographic tab selects items based on the user ID to which they are charged and (optionally) on title or charge characteristics. It changes the current location of the selected items to DISCARD. You can use this report to perform the following tasks:

- Discharge items from the MISSING user
- Discard a full collection or a portion of a collection
- Discharge items from a user who no longer has borrowing privileges

This report is the first step in the discard process. After you run this report, you must run the Remove DISCARD Items to completely remove the items from the catalog. To prepare items to discard based on location and catalog, call number, or item characteristics, use the Set Items to DISCARD report.

When you run the report to update database records, it does the following.

- Discharges items from the selected users. The users can be special status users like the MISSING user or a user who has been denied borrowing privileges and will not be returning charged items.
- Changes the current location of the item to DISCARD.

The Convert DISCARD Items report's selection process automatically disqualifies copies that meet one or more of the following conditions.

- Item has bills
- Item has one or more Copy level holds
- Item is on order
- Item is under serials control
- Item is accountable

The Convert DISCARD Items report checks in the items from MISSING user. The Current Location of the item is then changed to DISCARD.

By default, this report does not update selected records. However it prints a list of items that will be modified. Click the Update database records check box, if you do not want to print the list of changed items.
Remove DISCARD Items Report

After running either the Set Items to DISCARD report (Remdiscard) or the Convert DISCARD Items report, run the Remove DISCARD Items report to permanently remove discarded items from the catalog.

You can run the List Inventory by Item Number report to generate a list of items set to DISCARD so that the staff can perform a final search before you remove the items.
Patron Notices

Hold Pickup Notices Report

Schedule this report to run daily (or less often, depending on the number of holds placed at your library) to create notices that ask patrons to pick up available holds.

The Hold Pickup Notices report (Pickup) located in the Circulation group of reports selects holds that are ACTIVE and available and includes text for indicating that the hold is ready for pickup. The text of the notices that are available for printing can be defined by your library. Notice text files are on the Symphony server in the Unicorn/Notices directory.

On the Hold Notice tab, click the Count as a notice sent check box to track of the number of pickup notices sent to each user.

Use the Number Range and Notices gadget to change the number of notices sent to each user and change the notice text selection. This gadget helps to determine the number of pickup notices already sent, and the next notice to be sent in the series. If you only send one pickup notice, complete the Message 1 field only.
Even if your library does not send hold pickup notices, run this report to set a date flag in the Hold record. This will allow you to expire holds later that have been waiting on the hold shelf for too long.

**Sample Hold Pickup Notice**

Friday, December 19, 2003

Rockefeller University Library
1276 N Warson Rd
St Louis, MO
63132

Royce Morris
123 Hampton Ave
St Louis, MO
63116

"PICKUP NOTICE"

The item you requested is available for pickup from the Library. Contact the Circulation Desk to check out the item.

Thank you.

1 Green eggs and ham,
Geisel, Theodor, Seuss, 1904- [from old catalog]
call number:PZ8.3 .G276 GR copy:1
New Overdue Notices Report

The New Overdue Notices report (Noverdue) sends daily or weekly overdue notices, notices for recently overdue items, or items that became overdue during a specified date range. The report differs from other overdue notice reports because of a date range selection in the Charge Notice tab.

The following is one of the selection options available in the New Overdue Notices Report:

**Overdue**

If **Yes**, the report includes overdue items only. If **No**, the report only includes items that are not overdue. If **Both**, all charged items are included.

![Schedule New Reports: Schedule New Overdue Notices](image)
### Charge Notice Tab

<table>
<thead>
<tr>
<th>Basic</th>
<th>Charge Selection</th>
<th>Copy Selection</th>
<th>User Selection</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Status Selection</td>
<td>Sorting</td>
<td>Charge Notice</td>
<td>Produce Mailing Labels</td>
</tr>
</tbody>
</table>

- **Count as a notice sent**
- **Combine Notices**
- **Library address on notice**
- **Use Library Address in Patron Record**

Select 'Sent-From' Library:

- Library address:  
  - Primary
  - Address 1
  - Address 2
  - Address 3

- **Salutation on notice**
- **User ID on notice**
- **Group ID on notice**

#### Messages

| Message 1: | 0,1stoverdue | Date: |  |
| Message 2: | 1,2ndoverdue | Date: |  |
| Message 3: | 2,finaloverdue | Date: |  |
| Message 4: |              | Date: |  |
| Message 5: |              | Date: |  |

- **Closing text:**
- **Notice type:**  
  - Overdue
  - Recall

- **Title information to print with due date and time:**  
  - Brief bibliographic information
  - Call number

- **Price and fine information to print:**  
  - Accrued fine
  - Item price

---

**Count as a notice sent**

If selected, the number of overdue notices sent increments for each charge selected by the report. Alternately, the number of recall notices sent can increase if the Notice type selection is set to **Recall**.
Combine Notices
If selected, all notices for the user will be combined into one notice without regard to which library is the owning library or the charging library.

Library address on notice
If selected, the library’s address as defined in the user record for the library displays on the notice.

Salutation on notice
If Yes, the salutation “Dear User Name:” precedes the notice text, with the user name as defined in the user’s record, in addition to the User name and address that prints on all notices. If the user has a Title defined in his user record, such as Mr. or Ms., this replaces the user’s first name in the salutation.

User ID on notice
If selected, the user ID also displays on the notice.

Group ID on notice
If selected, the group ID also displays on the notice. In UnicornECOLE libraries that use the Group ID field as a Homeroom designation, reports can be sorted by Group ID (Homeroom), and distributed by the homeroom teacher.

Message 1-5
Number of messages available and the default notice text varies between reports. Use of the Message fields depends on the number of notices you send to users before taking more action. Each message can be increasingly stern. By using the Count as Notice Sent selection, if available, Symphony distinguishes between who last received their first, second, or third notice, and automatically sends the next notice in the series, all in a single report.

NOTE
If charges are selected that do not match one of the numbers of notices specified in the preceding selection, these charges are not printed. The log reports that these charges were selected but not printed.
Date

Allows selection of variable dates of overdues. The default selects overdue items that are due on the day the report is run. Use the Date Range gadget to make changes to the number of days preceding the report run date, or to select a specific date. This date selection is only available in the New Overdue Notices report.

Closing text

Your library can create the text files that can be selected from the verify list.

Notice type

If a charged item is recalled because another user has placed a hold on it, you may want to increment the number of recall notices that are sent, rather than the number of overdue notices. The notice text defaults may be the same as overdue notices if the charged item is also overdue, but text is also available for recall notices. This selection is relevant only if Yes is also selected in the Count as Notice Sent.

Sample Overdue Notice Report

Sunday, December 14, 2003
Rockefeller University Library
1276 N Warson Rd.
St Louis, MO
63132

Royce Morris                                    ID: 50764010001782
123 Hampton Ave.
St. Louis, MO
63116

Dear Royce Morris,

FINAL NOTICE

This is the final overdue notice. We have sent you several notices already. If you don’t return the following items we shall take your outstanding account to a collection agency for action.

1 call number:155.9 J                                   ID:38674001215845
First person singular : living the good life alone / Stephen M. Johnson.
Johnson, Stephen M.
due:10/24/2003,23:59
Circulation Mailer Report

The Circulation Mailer report (Mlrscirc) sends overdue, bill, and hold pickup notices, or any combination of the three (based on report selections). Overdue items, items held for pickup, or bills display in a compact, single-line list so that you can print many items on a single mailer form. By default, only ACTIVE holds are selected.

In a circulation mailer form, notice text may print inside one or more layers of a form with internal carbons. The user’s and the library’s address display on the first visible layer of the notice form. Optional notice text, a key to abbreviations, and a list of associated items display on the next layer. Use the Test Print of Notice Mailer report to verify the mailer form alignment before printing this report.

This report was designed to print on a particular commercial mailer and SirsiDynix does not guarantee that it will print on any other. Look in the online Help for more information about the mailer format.
Sample Circulation Mailer

Royce Morris  
123 Hampton Ave.  
St. Louis, MO  
63116

Rockefeller University Library  
1276 N Warson Rd  
St. Louis, MO  
63132

5) James Beard’s theory & practice  
   Beard, James, 1903-11/18/2002 (O)  
   641.5 B  
   id:38674001179660

6) First person singular : living  
   Johnson, Stephen M. 11/18/2002 (O)  
   155.9 J  
   id:38674001215845

7) Green eggs and ham,  
   Geisel, Theodor Se  
   PZ8.3.G276 GR  
   id:8876-2001

Sunday, December 14, 2003  
Patron ID:50764010001782

The Library would like your attention  
for the above overdue items, bills  
owed, and/or requested items held  
for pickup.  

O = Overdue  
P = Pickup Item  
B = Bills Owed
Create Circulation Notices in Batch Report

The Create Circulation Notices in Batch (Ntccirc) report generates one notice that will contain the user's overdue, bill, and hold pickup information, or any combination of the three types of notice information. You can use this report to create a single notice instead of running various other reports to create each type of notice.

Unlike the Circulation Mailer (Mlrcirc) report, the Create Circulation Notices in Batch report produces notices that are to be sent to the user by email, not printed on paper or on a special mailer form.
Create Notices in Multiple Languages

The Notices helper can be enabled for reports that create and print notices. You can use this helper to modify or create notice text. This helper not only allows the creation and modification of delivered notices, but also the creation of notices in multiple languages, to work with the Language field of the user record.

1. To create the notice text that corresponds with the Language field, open the Reports Module.
   - A supervisor or system administrator must turn on the Notice helper by right clicking on the Schedule New Reports wizard, selecting properties and checking the Display Notices Helper box.

2. Open the Schedule New Reports wizard.

3. Select any Notice report and the Setup & Schedule button at the bottom.

   To use the Notice helper, you must be on the tab dealing with notices.
4. Click on the Notices helper to make it display.
   - The default language is set to the language your Server has been delivered in.

5. Use the drop-down list to select a different language.
   - As seen here, initially there are no files. You must create them.
6. SirsiDynix recommends using the default file names when creating notices in other languages, as seen listed under the Default language selection.

7. To do this, select a language from the drop-down list, click the **Create** button at the bottom, and enter a file name.

---

**Note**

Delivered notices may be created the same way. However, to modify text, simply make the edits and click save.
8. Now the file name will appear in the file list. Click in the Content area and type your text.

9. When you have finished typing your text, click **Save**.

10. **Please note:** This will need to be done for every type of notice text, in order to use the new language feature for all of your Notices.

11. Click **Cancel** to close out this helper.
Example Notice text:

Wednesday, November 7, 2007

I. A. Arrowood Foundation Library

Marilyn Bigsey

ID: MARILYN

Dear Marilyn Bigsey,

Primera noticia * materiales atrasados

los materiales siguientes de la biblioteca están atrasados. Favor de regresar todos los siguientes materiales lo mas pronto posible.

Muchas gracias.

1 call number: 9465 .P4665 2002

Over sand and sea: a breviker's tales / Patrick Pfeister.
Pfeister, Patrick.
due:11/2/2007,12:00

I. A. Arrowood Foundation Library

Mike Hilmo

ID: MIKH

Dear Mike Hilmo,

* Premier Avis de Retard *

les documents suivants sont en retard. Veuillez les retourner

* a la bibliothèque d'as que possible.

Merci.

1 call number: PR681S.U565 C94 2003

Over here / Alan Hunter.
Hunter, Alan.
due:11/2/2007,12:00
Exercises

Exercise 9

Scenario: You would like to get some statistics on how many renewals were done through the OPAC by each patron user profile in the last 30 days.

Action: Schedule the Transaction Statistics report (in the Administration group) with the command, Renew User Part B. Select the interface or breakdown output by interface.

Exercise 10

Scenario: You want to get a list of patrons with overdue items that are at least 50 days overdue and for which the patron has already received at least one notice.

Action: Schedule the List Users with Charges report in the Circulation group. Make the appropriate selections.
Global Configuration Policies

Overview

WorkFlows Global Configuration policies are a class of policies that the WorkFlows client reads at startup and stores as global variables. These policies govern the behavior of various global features of the system. There is exactly one instance of each global policy; therefore, the Global Configuration wizard does not offer the Create, Copy, or Remove actions as with other configuration and policy wizards. A global policy can only be displayed or modified.

NOTE Modifications to a Global Configuration policy will only take effect after a halt and run of the Symphony server. Users with a Windows platform will stop and start the Symphony services.

To access the Global Configuration policies

On the Configuration module toolbar, click the Common Tasks toolbar, and then click the WorkFlows Global Configuration wizard. The following window appears.
To change the way User Information displays

1. After selecting the Global Configuration wizard, select the User Information tab.

   The following window appears. The policy Name and default Value appear in this window.

   ![Global Configuration: Select A Policy](image)

2. Select the policy name you wish to change and click **Modify**. The following window appears.

   ![Global Configuration](image)

   To modify the policy value, select the radio button to either display or not display the field.
4. Click to save your selection.

**To Update Staff Client by Specified Libraries**

*Use caution when changing this policy value.*

3. After selecting the Global Configuration wizard, select the Maintenance tab.

   The following window appears. The policy Name and default Value appear in this window.

2. Select a policy name, click Modify and the following window appears.

3. To modify the policy value, select Update Staff Client by Specified Libraries radio button and click Save.

4. Click to save your selection.

⚠️ **CAUTION !!**

Changing the default value of this global configuration policy, which is Update Staff Client at All the Libraries, may cause an undesirable effect when it comes to updating staff clients. Use caution when changing this policy value.
Configure Hold Range for Mailing Policy

The Configure Hold Range for Mailing policy is a Global Configuration policy that determines if holds configured to be mailed via Books by Mail are changed to group range holds when the hold is placed.

The Configure Hold Range for Mailing policy appears on the Circulation tab of the Global Configuration wizard. The default value for this policy appears in the Select a Policy window. To modify this value, select Configure Hold Range for Mailing and click Modify. Click a radio button to select one of the policy attributes. Click Save to save your selection. The default is Always Use Group Range.

**Allow User Selection for Range**

Click this option to enable Range options and allow the user to select ranges in the Place Hold wizard after a User Id and Item ID have been entered. Range options include Library, Group, and System. The Range option is not available if the Mail Item to User option is selected. This option is selected by default.
Always Use Group Range

Click this option to deactivate the Range options and set the range to Group when the Mail Item to User option is selected in the Place Hold wizard.

Configure Auto Cancellation of On–Order Holds

The Configure Auto Cancellation of On–Order Holds policy is a Global Configuration policy that allows automatic cancellation of holds placed based on holding distributions. This global configuration option will have an effect only when the ability to place on–order holds is enabled on the server.

The Configure Auto Cancellation of On–Order Holds policy appears on the Circulation tab of the Global Configuration wizard. The default value for this policy appears in the Select a Policy window. To modify this value, select Configure Auto Cancellation of On–Order Holds and click Modify. Click a radio button to select one of the policy attributes. Click Save to save your selection. The default is Do Not Automatically Cancel On–Order Holds When Order For Material On Hold Is Changed/Removed.
**Automatically Cancel On-Order Holds When Order For Material On Hold Is Changed/Removed**

Click this option to allow the automatic removal of holds when the order or orderline it is associated with is removed, when the orderline is modified to use a Holding Code policy that does not allow holds, when the orderline is modified to break the link to the title, or when the order is cancelled.

**Do Not Automatically Cancel On-Order Holds When Order For Material On Hold Is Changed/Removed**

Click this option to prevent automatic removal of holds when the order or orderline it is associated with is removed or modified. This option is selected by default. Holds created when this option is selected will remain in place until they expire, unless staff removes them.
Overview

SirsiDynix offers Web-based access to Z39.50 databases through iBistro/iLink. Z39.50 format queries are transmitted in the same, easy-to-use Web interface that is utilized for making searches against the local collection.

In addition to search and retrieval features similar to that of the Web client, copy catalogers use the SmartPort wizard (on the Cataloging Common Tasks toolbar) to find MARC records to add to WorkFlows. This wizard can simultaneously search multiple Z39.50 servers. SmartPort allows record-by-record copy cataloging using the Capture button. SmartPort also lets you save a file of acquisitions or cataloging records to the user’s PC. You can then upload these to the Symphony server and then load them into the catalog.

For more information on Z39.50 concepts, see the WorkFlows online Help file. There is additional information in the Client Care section of the SirsiDynix website at http://clientcare.sirsidynix.com.

You will need a password to access the Client Care section.
Z39.50 Search Type Gateway Elements

NOTE
The Fundamentals of iBistro/iLink Customization training guide provides information on OPAC Configuration.

Libraries set up access to Z39.50 databases by creating Z39.50 Search Type Gateway Elements using the Gateway Database Configuration wizard on the Configuration toolbar. The Z39.50 Search Gateway Type creates a search to access a Z39.50 server. By default, a KNOWLEDGE_PORTAL search group is delivered with a Z39.50 Sites group list, which is where most libraries define Z39.50 gateway elements. In this group, SirsiDynix delivers a connection to the Library of Congress’s VOYAGER database (LC).

To display the OPAC Configuration window for the LC gateway element

1. On the Configuration module toolbar, click the OPAC Configuration toolbar, and then click the Gateway database configuration wizard. The following window appears:

   ![Gateway database configuration: List Policies window]

<table>
<thead>
<tr>
<th>Gateway</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HYPERION</td>
<td>Hyperion Digital Media Archive</td>
</tr>
<tr>
<td>iBISTRO</td>
<td>iBistro at ...</td>
</tr>
<tr>
<td>iLINK</td>
<td>iLink at ...</td>
</tr>
<tr>
<td>UNICORN</td>
<td>Unicorn Delivery Gateway</td>
</tr>
</tbody>
</table>

   Click the Modify button to modify the gateway, and the Close button to close the window.
2. Select **IBISTRO**, and click **Modify**. The following window appears:

3. Double-click the **Knowledge Portal** folder.
4. Double-click the **Z39.50 Sites** folder.
5. Select **Library of Congress Books**, and click **Modify**. The following window appears:
Name

This attribute identifies a newly created gateway element. This name cannot contain any spaces and must be unique.

Description

This attribute provides a description of how the element may be used by the library. This description will appear in lists of elements to select from in iBistro or WebCat windows.

Type

This attribute defines the type of gateway element. Depending on the type selected, different tabs will display and various tab attributes will display.

WWW in use

If this attribute is selected, the WWW Information tab will appear. Click the WWW Information tab for more information.
Basic Tab Attributes

The Basic tab contains a selection to determine what clients will display this destination for selection.

User hierarchy level

This attribute identifies which users can access this gateway element, based on the User Access policy. Users must have a user hierarchical level equal to or higher than this attribute's value.

Element status

AVAILABLE (The Gateway element is active.)

HIDDEN (The Gateway element is usable but does not appear with the other elements in the same group. This element may appear when referenced from another group, or this element may contain elements used by custom buttons.)

NOT_AVAIL (The Gateway element is inactive.)

Icon name

This attribute specifies the image that graphically represents this gateway element. This image is not a hyperlink.

Display instructions

This attribute specifies whether to display the information in the instructions file. This attribute is used by WebCat only.

Instruction

This attribute contains the name of the text file of instructions. Stored in the /Unicorn/Gateway directory, this text file can contain searching examples and instructions, an abstract of database contents, copyright statements, usage disclaimers and/or usage restrictions. This attribute is used by WebCat only.
Heading

This 1-80 character attribute specifies the window title. If the element is a group element, this heading appears above the list of group or destination elements included within this element. If the element is a destination element, this heading appears at the top of the window.

Available clients for access

This attribute allows you to limit which clients can access the current element. This element can be used by the WebCat (and iBistro), WorkFlows, or InfoVIEW client, or any combination of the three. Certain element types only work with certain clients; for example, WWW type gateway elements only work in WebCat and iBistro so it is best to limit access to the WebCat client.
Destination Tab Attributes

Gateway database configuration: LC

Name: LC
Description: Library of Congress Books

type: Z3950_SRCH
✓ WWW in use

Basic  Destination  Search field  WWW Information

Number of simultaneous users: UNLIMITED
TIMEOUT: UNLIMITED
Session limit: UNLIMITED
Domain name: 3950.loc.gov
Port: 7090
Database name: VOYAGER
Format: BIBMARC

☐ Result set naming
☐ Sorting
☐ browsing
☐ Cross references
☐ Intermediate results

Presentation type: ○ Labelled fields  ○ Search icons  ○ Single Field  ○ None
Z3950 search mapping: LC2
Rank for holdings lookup: UNLIMITED
Z3950 operation: ○ Search  ○ Browse
☐ Authentication needed

Authorization string: 
Z3950 record syntax: JSMARC
☐ Post holdings

Character coding: 
Uniscipt: 

Save  Cancel
The Destination tab describes the server itself. Much of this information must be obtained from the library or vendor you are connecting to.

**Number of simultaneous users**

This attribute limits the number (1-24999) of simultaneous users that can be connected to this destination. When this limit is reached, no other users may log in to this destination until one of the current users selects another destination.

**TIMEOUT**

This attribute specifies the number of seconds (1-24999) Symphony should wait for a response from the database before timing out.

**Session limit**

This attribute limits the number of seconds (1-24999) that users may stay connected to the destination.

**Domain name**

This attribute specifies the Internet Protocol (IP) address or domain name (depending on the site's network configuration) of the site to which the user will connect. This attribute may be up to 80 characters long.

**Port**

This attribute specifies the reference database server's or the Z39.50 server's port number (1-32768 characters).

**Database name**

This attribute specifies the name of the reference database configured from the system in the specified directory or the name of the Z39.50 database to which users will connect. This name can be up to 100 characters long.

**Format**

This attribute specifies how Symphony will format the data when it is received from the destination database. This format controls window information such as which fields to display and which labels to use with these fields.

**Results set naming**

This attribute specifies whether the server supports result-set naming. If selected, and if you are searching multiple destinations, then each set of search results is separated by destination.
Sorting
This attribute specifies whether the server supports sorting. If selected, an option for sorting search results will be available when connected to this destination.

Browsing
This attribute specifies whether the server supports browsing. If selected, you can browse the catalog of the database to which you are connecting.

Cross references
This attribute specifies whether the server supports cross-references. If selected, and if your search expression has cross-references, the cross-references will be retrieved when searching the database.

Intermediate results
This attribute specifies whether the server supports intermediate search results. Depending on the number of items retrieved, intermediate search results are sometimes sent instead of full records.

Presentation type
This attribute defines how the search fields appear.

Z3950 search mapping
This attribute allows users to connect search terms to specific Z3950 search attributes. A complete map will describe all of the search terms available for a database.

Rank for holdings lookup
The system will use this number when searching the database holdings. All destinations with a rank of 1 will be searched first; those with a rank of 2 will be searched second, and so forth. When a destination is ranked 0, no holdings will be searched. This number may be between 0-24999.

Z3950 operation
This attribute specifies whether the database will default to a Search operation or a Browse operation when first accessed.

Authentication needed
This attribute specifies whether the server requires authentication. If selected, an authentication string must be typed before the destination can be accessed.
Authorization string
This 1-60 character string must be typed before the destination can be accessed.

Z3950 record syntax
This attribute defines the record syntax for the records returned by the server. Examples are USMARC (MARC21), UKMARC, etc.

Post holdings
This attribute specifies whether the Z39.50 connection should post holdings to the database.

Uniscript
This attribute specifies a file that contains a series of connection commands. The script can contain a network address, a server name, or a phone number. The script may also contain a complete dialog that watches for certain characters to be sent by the connecting system and that then sends replies to do an automatic login. These scripts are stored in the /Unicorn/Gateway/Scripts directory.
Search Field Tab Attributes

Name
This attribute defines the Z3950 search field label that displays next to the entry field where the user types the search term.

Search key
This attribute allows you to type a predefined search term or expression.

Operator
This attribute allows a predefined search to be expanded or limited using Boolean operators.
Setting Up a Z39.50 Connection

To set up a new Z39.50 gateway database connection to a Z39.50 server that can be accessed through iBistro/iLink, refer to the steps below.

**To set up a Z39.50 connection to the New York City Public Library**

1. On the Configuration module toolbar, click the OPAC Configuration toolbar, and then click the Gateway database configuration wizard.
2. Select IBISTRO, and click Modify.
3. Double-click the Knowledge Portal folder.
4. Double-click the Z39.50 Sites folder.
5. Click Create.
6. Enter the information as follows. (Bold values are based on information obtained from the site you are connecting to.)

<table>
<thead>
<tr>
<th>Name</th>
<th>NYC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>New York City Public Library</td>
</tr>
<tr>
<td>Type</td>
<td>Z3950_SRCH</td>
</tr>
<tr>
<td>WWW in use</td>
<td>No</td>
</tr>
</tbody>
</table>

7. Enter the following information on the Basic tab:

- User hierarchy level: EXTEND_PUB
- Element status: AVAILABLE
- Icon name: (Leave this blank.)
- Display instructions: No
- Available clients for access: WebCat

8. Click the Destination tab and enter the information as follows. (Bold values must be obtained from the site you are connecting to.)
<table>
<thead>
<tr>
<th>Feature</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of simultaneous users</td>
<td>UNLIMITED</td>
</tr>
<tr>
<td>TIMEOUT</td>
<td>UNLIMITED</td>
</tr>
<tr>
<td>Session limit</td>
<td>UNLIMITED</td>
</tr>
<tr>
<td>Domain name</td>
<td>catnyp.nypl.org</td>
</tr>
<tr>
<td>Port</td>
<td>210</td>
</tr>
<tr>
<td>Database name</td>
<td>INNOPAC</td>
</tr>
<tr>
<td>Format</td>
<td>BIBMARC</td>
</tr>
<tr>
<td>Result set naming</td>
<td>No</td>
</tr>
<tr>
<td>Sorting</td>
<td>No</td>
</tr>
<tr>
<td>Browsing</td>
<td>No</td>
</tr>
<tr>
<td>Cross references</td>
<td>No</td>
</tr>
<tr>
<td>Intermediate results</td>
<td>No</td>
</tr>
<tr>
<td>Presentation type</td>
<td>Single Field</td>
</tr>
<tr>
<td>Z3950 search mapping</td>
<td>INNOPACV1</td>
</tr>
<tr>
<td>Rank for holdings lookup</td>
<td>1</td>
</tr>
<tr>
<td>Z3950 operation</td>
<td>Search</td>
</tr>
<tr>
<td>Authentication needed</td>
<td>No</td>
</tr>
<tr>
<td>Authorization string</td>
<td>None</td>
</tr>
<tr>
<td>Z3950 record syntax</td>
<td>USMARC</td>
</tr>
<tr>
<td>Post holdings</td>
<td>No</td>
</tr>
<tr>
<td>Uniscript</td>
<td>None</td>
</tr>
</tbody>
</table>
9. Click the Search field tab and enter the attributes you will want to search. Leave the **Search key** blank and use **AND** as the **Operator** for all of the names.

Name 1  AUTHOR
Name 2  TITLE
Name 3  SUBJECT
Name 4  ISBN
Name 5  ISSN

---

**NOTE** You may enter only eight searches. Enter the most frequently used search names first.

---

10. Click **Save**.

11. Click **Cancel** to exit the wizard. These policy changes will take effect after you halt and run the Symphony servers.
To set up a Z39.50 connection to the New York State Library

1. On the Configuration module toolbar, click the OPAC Configuration toolbar, and then click the Gateway database configuration wizard.
2. Select IBISTRO, and click Modify.
3. Double-click the Knowledge Portal folder.
4. Double-click the Z39.50 Sites folder.
5. Click Create.
6. Enter the information as follows. (Bold values are based on information obtained from the site you are connecting to.)

<table>
<thead>
<tr>
<th>Name</th>
<th>NYSTATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>New York State Library</td>
</tr>
<tr>
<td>Type</td>
<td>Z3950_SRCH</td>
</tr>
<tr>
<td>WWW in Use</td>
<td>No</td>
</tr>
</tbody>
</table>

7. Enter the following information on the Basic tab:

- User hierarchy level: EXTEND_PUB
- Element status: AVAILABLE
- Icon name: (Leave this blank.)
- Display instructions: No
- Available clients for access: WebCat
8. Click the Destination tab, and enter the attributes as follows. (Bold values must be obtained from the site you are connecting to.)

- Number of simultaneous users: UNLIMITED
- TIMEOUT: UNLIMITED
- Session limit: UNLIMITED
- Domain name: nysl.nysed.gov
- Port: 2200
- Database name: SYMPHONY
- Format: SIRSICAT
- Result set naming: Yes
- Sorting: Yes
- Browsing: Yes
- Cross references: Yes
- Intermediate results: No
- Presentation type: Search icons
- Z3950 search mapping: UNICRN_STD
- Rank for holdings lookup: 1
- Z3950 operation: Search
- Authentication needed: No
- Authorization string: None
- Z3950 record syntax: USMARC
- Post holdings: No
- Uniscript: None
9. Click the Search field tab, and enter the attributes you will want to search. Leave the Search key blank and use AND as the Operator for all of the names.

   Name 1  ANY
   Name 2  AUTHOR
   Name 3  TITLE
   Name 4  SERIES
   Name 5  SUBJECT
   Name 6  ISBN
   Name 7  ISSN

   NOTE  Only eight searches may be entered. Enter the most frequently used search names first.

10. Click Save.

11. Click Cancel to exit the wizard. These policy changes will take effect after you halt and run the Symphony servers.
Exercises

Exercise 11

Scenario: You'd like to set up a Z39.50 connection to Emory University Library so that your catalogers can search their catalog records via SmartPort. This library has a Symphony database.

Action: Create a new gateway element in the iBISTRO Gateway for Emory University. Use the following values for the Destination and Search field tabs:

**Destination Tab**
- Domain name: libcat1.cc.emory.edu
- Port: 2200
- Database name: Symphony
- Z3950 search mapping: UNICRN_STD
- Z3950 record syntax: USMARC

**Search Field Tab**
- ANY
- AUTHOR
- TITLE
- SUBJECT
- ISBN
- ISSN
- SERIES
Exercise 12

Scenario: You'd like to set up a Z39.50 connection to the Metro Boston Library Network so that your catalogers can search their catalog records via SmartPort. This library uses a DRA Classic system with a database name of MARION.

Action: Create a new gateway element in the iBistro Gateway for Metro Boston. Use the following values for the Destination and Search field tabs:

**Destination Tab**
- Domain name: mbln.lib.ma.us
- Port: 210
- Database name: MARION
- Z3950 search mapping: DRACLASSIC
- Z3950 record syntax: USMARC

**Search Field Tab**
- ANY
- AUTHOR
- TITLE
- SUBJECT
- ISBN
- ISSN
Loading Bibliographic Records

Loading records in batch into your Symphony catalog is a two-step process:

1. Copy a file of records to the Symphony server using the MARC Import wizard.

2. Run the Load Bibliographic Records (bibload) report to add the titles to the catalog. Depending on your selection when scheduling this report, Symphony can use holdings information in the bibliographic record to create copy-level records, create copies for new titles based on a default Holding Code, or ignore item-level records altogether.

The example described in this section describes a common scenario. We will walk through copying a file of records from the hard disk or floppy disk to the proper directory on the Symphony server. The second phase of the example outlines the options for setting up the report to load those bibliographic records.

Importing MARC Records

Use the MARC Import wizard to import files of bibliographic or authority records from floppy disk, hard disk, or tape. Once imported, files can be listed, viewed, or removed.

Authority and bibliographic records can be in the same file—the MARC Import wizard separates the bibliographic and authority records into individual files to be processed separately with the appropriate reports. As part of the import process, Symphony first creates a file for bibliographic records in the /Unicorn/Marcimport directory on the server and writes any bibliographic records to this file. A file is also created in /Unicorn/Marcimport/Authtemp on the server, and any authority records are written to this file.

NOTE Some vendors will FTP MARC records for materials you purchase from them directly to this directory (if given server access).
To use the MARC Import wizard to import bibliographic data

1. On the Utility toolbar, click the MARC Import wizard. If the Property window appears, click OK to accept the defaults. The MARC Import window appears:

   ![MARC Import window]

   - File type: Marc or Sirsi flat (flat ASCII) as the file type to import.
   - Source: Navigate to a file of records saved on your hard drive.
   - Destination: Type your new name for the copy of the files on the host machine. Be sure to make a note of the destination file name to load the records into the Symphony catalog via reports.

2. Click Marc or Sirsi flat (flat ASCII) as the file type to import.

3. Click the Source gadget to locate the floppy disk drive, or navigate to a file of records saved on your hard drive.

4. In the Destination box, type your new name for the copy of the files on the host machine. Be sure to make a note of the destination file name to load the records into the Symphony catalog via reports.

   **NOTE** You may want to establish a naming convention based on the file creator and/or date created in naming your files of bibliographic records. A file copied to the server does not need to be loaded immediately into the catalog. Files can be given a descriptive name to distinguish them from other bibliographic records and loaded at your convenience.
5. Click **Import** to import the files to the server. A verification message appears:

   **Is diskette ready?**

6. Click **Yes** even if your files are not located on a diskette. A verification message appears:

   **Are there more files to upload?**

7. If you have no other files to load at this time, click **No**. If you have several files to load to the server, click **Yes**. This option appends the next file to the one that has just been loaded. When finished importing files, a log file appears:

   ![Log file image]

   **UNICORN Skip Flat Records v2003.1 started on Wednesday, August 25, 2004, 12:34 PM**
   **MARC records will be read from standard input.**
   **Flat records will be written to standard output.**
   **Only authority records will be selected.**
   **The default record format will be TOPICAL.**
   **0 marc record(s) read.**
   **5 marc record(s) processed.**
   **0 marc record(s) in error.**
   **0 record(s) written.**
   **UNICORN Skip Flat Records finished on Wednesday, August 25, 2004, 12:34 PM**

8. Click the **X** in the upper right corner to close this window. The MARC Import window remains open.

9. Click **Cancel** to exit this window.

After the files load, the file name displays on the Bib Files to Load tab (Authority files display on the Authority Files tab). Once you complete the first part of the batch load process—saving the file of records to the server—you can load the records into the catalog via reports.
Remove Unneeded Files

When using a batch record loading report, Symphony writes a backup copy of the records in the /Unicorn/MarcImport directory on the server machine. Records are stored in one of two directories, depending on whether the record was loaded successfully into the catalog or was loaded successfully for review.

- Records that loaded successfully in either the catalog or the review file are stored in files in the /Unicorn/MarcImport/Bibbackup directory.
- Records that failed to load are stored in files in the /Unicorn/MarcImport/Biberror directory.

To conserve disk space, remove all files under BIBBACKUP and BIBERROR after performing a full system backup. Remove files using the MARC Import wizard, located on the Utility toolbar.

**To remove unneeded files**

1. On the Utility module toolbar, click the MARC Import wizard. If the Property window appears, click OK to accept the defaults. The MARC Import window appears.
2. Click the Loaded Bib Files tab.
3. Select the file you want to remove, and click **Remove**. To remove multiple files at the same time, press CTRL, click each file you want to remove, and then click **Remove**.
Load Bibliographic Records Report

This section describes the process to load a file of imported bibliographic records. This example ignores any local holdings information found in the records. It uses a default holding code to create copies when creating titles.

NOTE
If you regularly load records into the system in batch, you may want to add the MARC Import Utility, Schedule New Reports, and Finished Reports wizards to your existing Cataloging toolbar. For information on modifying the toolbar, see WorkFlows online Help.

To run the Load Bibliographic Records report

1. On the Reports module toolbar, click the Schedule New Reports wizard. The Display Template Reports window appears.
2. Click the MARC Import tab. The following window appears:

4. Click the Load tab to display the following window:
5. On the Load tab, make the following selections:
**Input file**

**File to load**

The records to be loaded must have already been imported using the **MARC Import** wizard.

In the **File to load** list, select a file to load from those present in the directory. If you do not see your file name here, it was not loaded properly and you will need to run the **MARC Import** wizard again.

**File format**

Click **MARC** to load any files that are MARC format. Click **flat** to load files in ASCII format.

**Title Control Processing**

**Title control number source for incoming items**

The title control number source rule prescribes the number used as the title control number in Symphony. In determining whether an incoming record matches a record already in the Symphony database, the title control numbers of existing records are matched against the corresponding entries of the incoming record. Symphony checks the catalog for a match on the first match point value. If no match is found, the second match point will be checked, and this pattern will continue until all match points have been checked. If the match points specified are exhausted, the incoming record will be considered a new record. Use the Title control number source rule gadget to select control number rules.

The following diagram illustrates an “ils” (ISBN (020), LCCN (010), ISSN (022)) title control number source rule.
If no, the process starts over. Is there an ISBN (020) in the incoming record?

If no, is there an ISSN (022) in the incoming record?

If no, is there an LCCN (010) in the incoming record?

If yes, the LCCN becomes the provisional title control number for the incoming record. Is there a title control number in your Unicorn catalog that matches the provisional number?

If yes, the LCCN becomes the title control number for the incoming record.

If yes, the ISSN becomes the provisional title control number for the incoming record. Is there a title control number in your Unicorn catalog that matches the provisional number?

If yes, the ISSN becomes the title control number for the incoming record.

If yes, the ISBN becomes the provisional title control number for the incoming record. Is there a title control number in your Unicorn catalog that matches the provisional number?

If yes, the ISBN becomes the title control number for the incoming record.

The existing record may be updated according to other settings in the bibload report.

A new bib record, call number and copy record may be created according to other settings in the bibload report.

If no, an auto-generated title control number (an “a” number) is created as the title control number for the incoming record.
Title control number matching rule

The title control number matching rule determines if matched records will be replaced, if new records should be created and which, if any, records should either load for review or write to an error log. Use the gadget to choose the appropriate option for your library.

The title control number matching rule determines how the records being loaded will relate to existing records. The following title control number matching rules are available:

**Rule 1: Create Only** – Only new records will be created. Records with title control numbers matching existing records will not load. Error records are printed in the report log with the header flex already exists.

**Rule 2: Create and Update if Date Cataloged is NEVER** – New records will be created. Records with title control numbers matching existing records will only load for records that do not have a date cataloged. Records matched that have a date cataloged specified will not load. Error records that match existing records will be printed in the report log with the header flex already exists and the corresponding date in the date cataloged field.

**Rule 3: Update only if Date Cataloged is NEVER** – Records with title control numbers matching existing records will load only for records that do not have a date cataloged. New records and records that match a record with a date cataloged specified will not load. Error records that match existing records will be printed in the report log with the header flex already exists and the corresponding date that is in the Date Cataloged field.

**Rule 4: Always Create and Update** – New records will be created. Records with title control numbers matching existing records will always load, replacing records that may have previously had cataloging activity.

**Rule 5: Always Update only** – Records with title control numbers matching existing records will always load, replacing records that may have previously had cataloging activity. New records will not load. Error records will be printed in the report log with the header flex not found.

---

**NOTE** Error records not related to flexkey matching are only printed in the log if there is a problem with the MARC record or copy processing.
Compare multiple occurrences of a title control number field (not recommended)

If this option is selected, all recurring fields in the record such as ISBN 020 will be compared against the existing title control key. All of the fields with the designated prefix in the incoming record are matched against the existing title control key.

If this option is not selected (disabled), only the first field selected in your match list and encountered in the incoming record will be matched against the existing title control key. The first key encountered is always used for new records.

Update date cataloged

Each record created or updated by the records loaded displays a value in the Date Cataloged field of the Control tab. Use the Calendar gadget to select a date. If you decide to overwrite these records at a later point, you may want to use NEVER to give yourself the most flexibility.

Default record format

If the loader is unable to determine the format of the record, the default record format will be assigned. In the Default record format list, select a record format. MARC is Symphony’s record format for monographic print materials.

Update title control information from title information entry

Dates created, modified, and cataloged can be updated for each record during the load process using a title information entry such as the 948. If this field is left blank, dates created and modified will be set to the date of the load itself.
Bibliographic Record Processing

Update bibliographic record when updating records

It may be more efficient to create or update call numbers and copies from loaded holdings statements than to do it manually.

If no changes need to be made to the bibliographic record and only copy information updated, click to clear this option. In most cases, you will want to select this option to update the records’ cataloging information.

Update publication year

This option is preset and cannot be cleared (disabled). The publication year will be updated in the fixed field from the incoming record or entry type.

Remove entries listed in the file “junktag”

Certain entry IDs may not be used in completed catalog records in your library. These fields can be added to a junktag file on the server by your system administrator.

If the junktag file is in use and you select this option, those fields are automatically removed from incoming records and cannot be restored.

If this option is not selected (disabled), all fields in the imported record will be loaded.

Remove medical subject headings (MeSH)

If this option is selected, Medical Subject Headings will not be loaded.

If this option is not selected, the Medical Subject Headings will be loaded along with other headings, including Library of Congress Subject Headings. The loader identifies a MeSH heading as any 6xx tag with the second indicator set to 2.
Call Number and Copy Processing

Holdings entry preprocessing

Certain types of records require preprocessing.

If you are using the 049 tag in the MARC record to construct your holdings, or new Microlif records with holdings information in the 852 field, or old Microlif records with holdings in a 9xx field, your records may require preprocessing. In these instances, select a preprocessing method in the Holdings entry preprocessing list.

If you use copy processing with a Sirsi holdings statement or are not using a holdings statement at all, these preprocessing methods are not required. In the Holdings entry preprocessing list, click None.

Copy processing

Copies can be created automatically during the load process using a holding code, a holdings entry statement such as the 949, or they can be created or modified manually after the load. Use the gadget to choose the appropriate option for your library.

Use the Multiple Policies gadget to select a copy processing method. The following values will display:

Create NO copies – All of the records in the file will load only bibliographic records and call numbers, but not copies. This option is useful when loading records for acquisitions. The call number will be assigned the library information from the default holding code.

NOTE This selection is not available if a Holdings entry preprocessing method has been specified.

Create but do not update copies using holdings statement – If your library uses a holdings statement, such as the 949, copies will be created from the holdings statement for new copies. Existing copies will not be updated from the holdings statement.
Ignore holdings statements & create ONE copy only when creating a title – Holdings statements will not be used, but one copy will be created for each new title loaded. Updated records will not have any copy processing regardless of existing holdings statements. The call number and copy will be assigned the library, location, and item information from the default holding code.

**NOTE**
This selection is not available if a Holdings entry preprocessing method has been specified.

Create and update copies using holdings statement – Both new and updated records will use holdings statements. Existing copies will be updated using the incoming holdings statement information.

Create copies using holdings statement only when creating a title – Only new records will use holdings statements. When a title control number is matched in an updated record, all existing copies associated with that call number are retained and only bibliographic information is updated.

Entry ID – The Entry ID containing the holdings information for call numbers and copies is repeatable, but only one entry ID can be selected. If your records have been preprocessed using one of the Holdings entry preprocessing methods, use the default 999 entry ID. Use the list to select the entry ID used by your library.

**Call number load rules**

The rules selected in this field determine how the Symphony call number is created from the bibliographic record and what classification scheme is used. Use the Call Number Load Rule gadget to select a rule or list of rules. You must select (1) an Entry ID, (2) a Class scheme, (3) subfields, and (4) first or last occurrence, and you may have multiple options saved in a hierarchy. Use the gadget to save these fields in the proper syntax.
Default holding code

All the records loaded by the report use the library and location information defined by the selected holding code. In the Default holding code list, select a holding code.

Be aware that only one holding code (and thus copies established for one library) can be selected per bibload, which could require using the cataloging wizards to modify call number information if titles are loaded for multiple libraries. You may want to work with your system administrator to establish more holding codes and load in smaller batches to minimize cleanup.

NOTE

If your library loads records using holdings statements for copy processing, as explained in Appendix C, the DEFAULT holding code will be used if the subfield h is absent from the holdings statement. If an invalid holding code is found in subfield h, the UNK holding code will be used.

Create/update price from holdings statement, 020 subfield c

Each item has a Price field at the copy level that can be updated from subfield c of the 020 tag. Click to clear this option to retain the price in existing copy records when overlaying.

Update AUTO-assigned call numbers

Records created “on the fly” often have an auto-generated call number. Select this option to replace any AUTO call numbers in matched records with the incoming call number.

Error records

If the Load for review option is selected, records that were selected not to load will be saved to a file on the server that can be approved later, and then loaded using the Reload Bibliographic Records report. If this option is selected, you must complete the Default review status and Library fields.

- Default review status – All records loaded for review have a designated review status. In the Default review status list, select a default review status.

- Library – All titles in the report that are loaded for review are assigned a review status for the specified library. In the Library list, select a library.
If the Write to error file option is selected, titles that do not load will print in error in the report log, and the MARC records will be stored in files in the /Unicorn/Marcimport/Biberror directory.

6. After making your selections, click Schedule to run the report.

- OR -

Click Save As Template to save your bibload selections as a template before scheduling it to run. If you save a report as a template, the next time you run that report, you will only have to change a limited number of values in the report rather than recreating it. With bibload, you may need to change the file name each time you run the report, depending on your file name conventions.

The Schedule Load Bibliographic Records window appears:

7. Click ASAP to load the records into the catalog as soon as possible, or click Once to load the records at a specific date and time. Bibliographic records added or modified will be immediately searchable in the keyword index.

8. Click Schedule. A confirmation window appears.

9. Click Close to exit this window.
**Sample Load Bibliographic Records Report Log**

Report Log for Catalog Record Load
Report bibload scheduled as Load Bibliographic Records
Load bibliographic records into catalog.

UNICORN Catalog MARC Load v2003 started on Friday, December 19, 2003, 9:56 AM
Records will be interpreted according to the following format: MARC.
The item number will be updated.
The MARC record will be updated.
The price will be updated.
The year of publication will be updated.
The ISBN (020) will be used as the flexible key.
The LC call number will come from the first tag 050.
All subfields will be included in the call number.
The ISBN (020) will be used as the flexible key.
The first occurrence of the specified flexible key fields will be compared to the flexible key index for matching.
Records not matched will be loaded, but records which match will be rejected.
The date cataloged will be set to 12/19/2003.
Bibliographic records will be matched by flexible key.
MARC records will be read from standard input.
DEFAULT will be used as the default holding code.

**WARNING:ERROR IN LIBRARY**

```
**Flexible key already exists.: i0385511612

**```
```
**Flexible key already exists.: i0399150897

@01226cam  22003618a 450001000900000050170000900804100026035002400067906004
@050009192500440013695501050018001001700285020002800302040001800330043002100348
@05000270036908200160039610000320041224500350044426000450047926300090052430001
@0100533650052005446500036059665000320063265000310066465000260695651002400721
@06510022007456550028007679630630708596000600858#13325724#20031010095133.0#030
@0827s2003  nuy 000 1 eng # #a(Sirsli) 10399150897# #a7#brix#corig
@0new#d1#eocp=#20#gy-gencatlg#0 #aacquire#b2 shelf copies#xpolicy default# #ap
@0c10 2003-08-27 to HLC#clck50 2003-09-02#dlh06 2003-09-02#elh44 2003-09-02 to D
@0eweey#aaa07 2003-09-03# #a 2003062314# #a0399150897 (alk. paper)# #adLC#cdL
@0C#dDLC# #an-us-la#an-us-fl#00#aPS3553.O692#bB576 2003#00#a813/.54#222#1 #aCor
@0well, Patricia Daniels.#10#ablow fly /#cPatricia Cornwell.# #aNew York :#bG.
@0 P. Putnam's Sons,#cc2003.# #a0310# #ap. cm.# #aScarpetta, Kay (Fictitious
@0#character)#vFiction.# #aForensic pathologists#vFiction.# #aDeath row inmates
@0#vFiction.# #aWomen physicians#vFiction.# #aPsychopaths#vFiction.# #aLouisi
@0#ana#vFiction.# #aFlorida#vFiction.# #aMystery fiction.# #2gsafd# #aLily Chin,
@0 #212-366-2438; bc: lily.chin@us.penguin.com# #a1##

1 CARNEGIE DEFAULT item(s) created.
1 ROCKEFELLR UNK item(s) created.
1 ROCKEFELLR ROCKBK item(s) created.
3 total item(s) created.
0 total item(s) ignored.
5 bib record(s) read.
2 bib record(s) in error.
3 bib record(s) loaded.
0 bib record(s) cancelled.
0 full bib record(s) replaced.

UNICORN Catalog MARC Load finished on Friday, December 19, 2003, 9:56 AM

UNICORN item printing v2003 started on Friday, December 19, 2003, 9:56 AM

The catalog key will be read from standard input.
The output will be a record by record list.
Catalog bibliographic information will be written to standard output.
Enter IDs: ALL.
Entry IDs will precede catalog data.
Subfield codes will appear in output.
The report title option will be used.
3 catalog record(s) printed.
0 catacnt record(s) printed.
0 call number record(s) printed.
0 item record(s) printed.
0 itemacnt record(s) printed.
Loading Users

Load Users Report

The Load Users report (userload) loads user records from a flat ASCII text file into the Symphony user database creating either new or updating existing users. The report is in the Administration group of Reports.

To import user record data into the user database

1. Prepare the input records according to Symphony’s requirements.

The following is the layout of the ASCII text record.

```
*** DOCUMENT BOUNDARY ***
FORM=LDUSER
 .USER_ID. User ID
 .USER_ALT_ID. User alternative ID
 .USER_ROUTING_FLAG. Routing allowed flag
 .USER_GROUP_ID. Group ID
 .USER_RESP_CODE. Responsibility code
 .USER_TITLE. Title
 .USER_NAME. Name
 .USER_LIBRARY. Library name
 .USER_PROFILE. User profile
 .USER_LOCATION. Location
 .USER_ACCESS. User access policy
 .USER_ENVIRONMENT. Environment policy
 .USER_CATEGORY1. Statistical category 1
 .USER_CATEGORY2. Statistical category 2
 .USER_DEPARTMENT. Department
 .USER_BIRTHYEAR. Birth year
 .USER_PRIV_GRANTED. Date privilege granted
 .USER_PRIV_EXPIRES. Date privilege expires
 .USER_LAST_ACTIVITY. Last activity date
 .USER_PIN. P.I.N.
 .USER_STATUS. Delinquency status
 .USER_CLAIMS_RET. Number of claims returned
 .USER_MAILINGADDR. Mailing address
 .USER_ADDR1_BEGIN.
 .USER_ADDR1_END.
 .USER_ADDR2_BEGIN.
 .USER_ADDR2_END.
 .USER_ADDR3_BEGIN.
 .USER_ADDR3_END.
 .USER_XINFO_BEGIN.
 .USER_XINFO_END.
 .UACNT_CLEARANCE. Accountability clearance
 .UACNT_CITIZENSHIP. Accountability citizenship
 .UACNT_ACCESS_RESTR. Accountability access restrictions
 .UACNT_NEED_TO_KNOW. Accountability need-to-knows
 .UACNT_PATRONTYPE. Accountability patron type
 .UACNT_AUTHORITY. Accountability clearance granting authority
 .UACNT_SSN. Accountability social security number
 .UACNT_BIRTHDATE. Accountability date of birth
 .UACNT_BIRTHPLACE. Accountability place of birth
```
NOTE  Omit any field not used from the record.

The following are required fields for the ASCII text record:

- USER_ID
- USER_NAME
- USER_LIBRARY (when adding a new user in a multi-library system)
- USER_PROFILE

2. Transfer the file containing the user record data from your PC disk to the Unicorn/Xfer directory of your server using an FTP application.

3. Run the Load Users report to create or update the Symphony user records.

File to Load

This field is required. Files of user records that have already been placed on the server in the Unicorn/Xfer directory display for selection. Use the list to select a file of user records.

Load by alternate ID

If this option is set to Yes, the alternative ID will be used to match against existing user records. By default, users are matched by user ID, so this option is set to No.
Update other ID

When user records are matched against existing users and a match is found, you may select Yes to update whichever ID was not matched. For instance, if you are loading by user ID, the alt ID will be modified to the value supplied in the incoming record. Select No to leave both the matched ID and the other ID unmodified.

Default library

Users in incoming records can be created or updated to any library defined in the appropriate field of the incoming user record. If new users are being loaded without a defined library, the library specified in this field will be the default library assigned to the user. Existing users are not updated to the Default Library; the existing user library is retained. The default value that displays is the Library associated with the user access of the user who schedules the report. If the text in the Library field of the incoming record is not a valid Library policy name, the record will be loaded in error.

Mode

When user records are matched against existing users and a match is found, the mode determines how the records being loaded will relate to existing records.

Create – This option loads only new records.

Update – This option loads only records that are matched against existing records.

Create and update – This option creates new users for records that do not match an existing user, and user records that do match an existing user are updated. Create and Update is the delivered default.

Test only

The Test only option allows you to run the Load Users report without making any modifications to the database. By default, this check box is cleared.

Dynamic Indexing

If you click this check box, Symphony automatically indexes the loaded user records so that they can be searched and browsed in the user searches. If you clear this check box, the user records are not indexed until the next run of the Add, Delete, Update User (Adduserertext) report.

We recommend that you click to clear the Dynamic Indexing check box when loading more than 2,000 user records at one time so the Symphony system performance is not adversely affected.
Sample Load Users Report Log

Report Log for Users Loaded from Data File
Report userload scheduled as Load Users
User records created or updated by external data.

UNICORN load flat users v2003 started on Friday, December 19, 2003, 10:06 AM
Flat user input records will be read from standard input.
Batch server transactions will be written to the apiserver.
Keys of new or updated users will be written to standard output.
Records with errors will be saved in c:/tmp/rpt1060.xfererr.
The user ID will be used as the matching key.
Records not matched will be loaded, but records which match will be rejected.
The batch user ID for transactions will be ADMIN.
The batch workstation name for transactions will be PCGUI-DISP.
Default user library will be ROCKEFELLR.
**Invalid library name in input record:**
*** DOCUMENT BOUNDARY ***
FORM=LDUSER
.USER_ID. |a999666444
.USER_NAME. |aMr. Darcy
.USER_MALINGADDR. |a1
.USER_LIBRARY. |aROCK
.USER_PROFILE. |aSTUDENT
.USER_PRIV_GRANTED. |a20030925
.USER_PRIV_EXPIRES. |a20041231
.USER_STATUS. |aOK
.USER_ADDR1_BEGIN.
.STREET. |a101 Washington Street
.CITY/STATE. |aHuntsville, AL
.ZIP. |a35801
.PHONE. |a256-704-7000
.EMAIL. |aafdarcy@sirsi.com
.USER_ADDR1_END.
.USER_ADDR3_BEGIN.
.COUNTY. |aMadison
.USER_ADDR3_END.
.USER_XINFO_BEGIN.
.NOTE. |aNew patron
.USER_XINFO_END.
46 line(s) read.
2 user record(s) read.
1 bad input record(s) encountered.
1 new user record(s) created.
0 existing user record(s) updated.
UNICORN load flat users finished on Friday, December 19, 2003, 10:06 AM
Appendix A – Solutions to Exercises

Exercise 1

1. On the Utility module toolbar, click the Save properties wizard. The Save Properties window appears.
2. Select the “site” property file from the list, and click Load.
3. Click the + next to the Circulation folder.
4. Click Checkout, and click Modify. The Set Properties window appears.
5. On the Behavior tab, click to clear the check box next to Pay bills.
6. Click the Helpers tab, and click to clear the check boxes next to User Lost Card, Register New User, Pay Bills, Add Brief Title, Change Item ID, Special Due Date, and Renew Privilege.
7. Click OK.
8. Click Discharging on the list, and click Modify.
9. On the Behavior tab, click to clear the check box next to Pay bills.
10. Click the Helpers tab, and click to clear the check boxes next to Pay Bills and Change Item ID.
11. Click OK.
12. Click Renew User on the list, and click Modify.
13. On the Behavior tab, click to clear the check box next to Extend user’s library privilege.
14. Click the Helpers tab and click to clear the check boxes next to User Lost Card, Pay Bills, Special Due Date, and Renew Privilege.
15. Click OK.
16. Click Renew Item on the list, and click Modify.
17. On the Behavior tab, click to clear the check box next to Extend user’s library privilege.
18. Click the Helpers tab, and click to clear the check boxes next to Change Item ID, Special Due Date, and Pay Bills.
19. Click **OK**.

20. Click **Display User** on the list, and click **Modify**.

21. Click the Helpers tab, and click to clear the check box next to Pay Bills.

22. Click **OK**.

23. In the box, type **volunteer** as the new properties file name.

24. Click **Save**.
Appendix A – Solutions to Exercises

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Exercise 2

1. On the Configuration module toolbar, click the Access Control Configuration toolbar.

2. Click the User Access Policy wizard.

3. On the List Policies window, select CIRC and click Copy.

4. Next to New policy name, type VOLUNTEER and click OK.

5. Change the Description to Volunteer.

6. Delete all of the report groups in the Report group list attribute.

7. If an appropriate Properties file exists, select it from the list (e.g., the volunteer properties file created in Exercise 1).

8. Click the Access list tab.

9. Click to clear the check box next to Acquisition. Do the same for Authority Booking, Cataloging, Configuration, Outreach, Request, Reserve, Serial, and Utility.

10. Click the + next to Cataloging.

11. Select the check boxes next to Lookup and Item Search and Display.

12. Click to clear the check box next to Circulation.

13. Click the + next to Circulation. Reselect the following wizards: CheckOut, Discharging, Discharging Bookdrop, Renew Item, Renew User, and Display User.

14. Click Save.

15. At the List Policies window, click Close.

16. Click the User Configuration wizard.

17. Click the User Profile Policy wizard.

18. On the List Policies window, select CIRC and click Copy.

19. Next to New policy name, type VOLUNTEER and click OK.

20. Change the Description to Volunteer.

21. Click the Login Attributes tab.
22. Select **VOLUNTEER** from the **User access** list.

23. Click **Save**.

24. At the List Policies window, click **Close**.

---

**NOTE**

Since new policies were created, halt and run the Symphony servers before proceeding to step 26.

---

25. Use the **New User Registration** wizard on the **Circulation** toolbar to create the user record. The user ID and PIN entered in the user record will be used for the WorkFlows login. Assign the VOLUNTEER user profile.
Exercise 3

1. Click the Utility module toolbar.

2. Click the Toolbar Management wizard.

3. In the Delivery Toolbar Files column, right-click the Circulation toolbar, and click Copy to Customized.

4. In the Customized Toolbar Files section, click the + to open the copied Circulation toolbar.

5. Right-click Billing a User, and click Remove.

6. Repeat step 5 for all of the wizards on the toolbar, except CheckOut, Discharging, Renew User, Renew Item, and Display User. (You may want to delete the entire User Maintenance group, and then add back only the Display User wizard.

7. When finished modifying the toolbar, right-click Circulation, and click Save As.

8. Type volunteer for the File name, and click Save.

9. In the Enter description box, type Volunteer and click OK.

10. Click Close.
Exercise 4

1. Click the Configuration module toolbar.
2. Click the User Configuration toolbar.
3. Click the User Profile Policy wizard.
4. On the List Policies window, select PUBLIC and click Copy.
5. Next to New policy name, type NONRES and click OK.
6. Change the Description to User profile for non-residents.
7. Under Privilege limit, select years and then type a 1 in the corresponding field.
8. In the Privilege fee box, type 20.00.
9. Click Save.
10. At the List Policies window, click Close.
Exercise 5

1. Click the **Configuration** module toolbar.
2. Click the **Circulation Configuration** toolbar.

3. Click the **Item Type Policy** wizard.
4. Click **Create**.
5. In the **Name** box, type **BESTSELLER**.
6. In the **Description** box, type **Bestsellers**.
7. Change the **Hold Threshold** value to **250**.
8. Leave the **Booking profile** blank.
9. Click **Save**.
10. At the List Policies window, click **Close**.
Exercise 6

1. Click the **Configuration** module toolbar.
2. Click the **Circulation Configuration** toolbar.
3. Click the **Circulation Map Policy** wizard.
4. Click **Create**.
5. In the **Name** box, type **BESTSELLER**.
6. In the **Description** box, type **Bestsellers**.
7. Select **All** from the **Library** list.
8. Select **All** from the **User profile** list.
9. Select **BESTSELLER** from the **Item type** list.
10. Select a **Circulation rule** from the list. If there is not an appropriate Circulation Rule policy to use in the list, click the **Circulation Rule** helper.
   a. On the List Policies window, select **14DAY** and click **Copy**.
   b. In the **New policy name** box, type **21DAY** and click **OK**.
   c. In the **Description** box, type **21 days**.
   d. Select a **Loan period** from the list. If there is not an appropriate Loan Period policy to use in the list, click the **Loan Period** helper.
      1. On the List Policies window, select **14DAY** and click **Copy**.
      2. In the **New policy name** box, type **21DAY** and click **OK**.
      3. In the **Description** box, type **Circulates for 21 days**.
      4. Under **Period type**, select **Daily**.
      5. In the **Period count** box, type **21**.
      6. Type **23 hours and 59 minutes** to set the **Time due** to one minute before midnight.
      7. Click **Save**.
      8. Select **21DAY** from the **Loan period** list.
   e. Select **OVERDUE** from the **Billing structure** list.
   f. In the **Renew limit** box, type **0**.
g. Select **Chargeable**.

h. In the **Maximum charges** box, type 3.

i. Select **RECALL** from the **Recall loan period** list.

j. Select **14DAY** from the **Alternate loan period** list.

k. Click **Save**.

l. Select **21DAY** from the **Circulation rule** list.

11. Click **Save**.

12. Reorder the map so that your new line for Bestsellers is not at the bottom. It should be above any lines dealing with MISSING or LOST items.

13. Click **Close**.
Exercise 7

1. Click the **Configuration** module toolbar.
2. Click the **Cataloging Configuration** toolbar.
3. Click the **Catalog Format Policy** wizard.
4. On the List Policies window, select **MARC** and click **Modify**.
5. Click the Entries tab.
6. Verify that ISBN (020) is a valid entry ID in the MARC format (look for it in the list of entries).
7. Click the **Entry ID** helper.
8. On the List Policies window, select **MARC-FULL** and click **Modify**.
9. Click the **Entries** gadget.
10. Select 020 on the **List to choose from**. Click the arrow to add the 020 to the **List selected**.
11. Scroll to the bottom of the **List selected**, and click the 020. Use the arrows to move the 020 up in the list.
12. Click **OK**.
13. Click **Save**.
14. Click **Save** again.
15. At the Catalog Format Policy : List Policies window, click **Close**.
16. After a halt and run (stop/start) of the Symphony Services, the ISBN will appear in Full Displays of monograph catalog records.
Appendix A – Solutions to Exercises

Exercise 8

1. Click the **Configuration** module toolbar.

2. Click the **Cataloging Configuration** toolbar.

3. Click the **Catalog Format Policy** wizard

4. On the List Policies window, select **MARC** and click **Modify**.

5. Click the Entries tab.

6. Select **035** in the list, and click **Modify**.

7. Click the Keyword tab.

8. Click the **Keyword Index** helper
   a. Click **Create**.
   b. Type **035** for the **Name** and **Description**.
   c. Under **Type**, select **Searchable**.
   d. Select the first available value from the **Internal name** list.
   e. Enter the **Sort index**.
   f. Click **Save**.

9. Select **035** from the **Index** list.

10. Click **in addition to others**.

11. Click the **Subfields** gadget to make sure **All** subfields will display. Click **OK**.

12. Click **Create**. **035** should appear under **Keyword index variations**.

13. Click **Save**.

14. Click **Save** again.

15. At the Catalog Format Policy : List Policies window, click **Close**.

16. Changes to keyword index variations affect records indexed after you make changes. To implement changes to keyword indexes in records already keyword indexed, run the Rebuild Text Database report to re-index all your bibliographic records. Keyword searching and browsing will be disrupted while this report runs.
Exercise 9

1. Click the **Reports** module toolbar.

2. Click the **Schedule New Reports** wizard.

3. Click the Administration tab.

4. Select the **Transaction Statistics** report, and click **Setup & Schedule**.

5. On the Basic tab, type **OPAC Renewals by User Profile** for the **Report name**.

6. Click the Transaction Statistics Selection tab.

7. Click the **User profile** gadget, and select only those user profiles used for patrons (ASSOCIATE, FACULTY, GRADSTNDT, PUBLIC, STAFF, STUDENT) in the **List to choose from**. (You may use the SHIFT or CTRL keys to select multiple profiles.)

8. Click the arrow to add the selected profiles to the **List selected**, and click **OK**.

9. Click the Transaction Selection tab.

10. D-30:D0 is the default **Transaction date range**. Keep this default.

11. Click the **Command** gadget. Select the command **Renew User Part B** in the **List to choose from**.

12. Click the arrow to add the selected command to the **List selected**, and click **OK**.

13. Click the Transaction Statistics tab.

14. Select **User profile** from the **Column** list.

15. Select **Interface** from the **Row** list.

16. Click **Schedule**.

17. Click **Schedule** to schedule the report to run **ASAP**.
Exercise 10

1. Click the **Reports** module toolbar.

2. Click the **Schedule New Reports** wizard.

3. Click the Circulation tab.

4. Select the **List Users with Charges** report, and click **Setup & Schedule**.

5. On the Basic tab, type **Users with VERY overdue items** for the **Report name**.

6. Click the Charge Selection tab.

7. Click the **Date due** gadget.

8. Click the **Date depends on the report run date** helper.

9. Under **Start date**, select **Since the beginning of the system**.

10. Under **End date**, select **Before** and select **Days** from the list.

11. Change the 1 to a 50 (50 days before the report run date), and click **OK**.

12. Select **Overdue**: **Yes**.

13. Click the **Number of overdue notices** gadget.

14. Click the greater than > symbol and type **0** (zero) in the box.

15. Click **OK**.

16. Click the Sorting tab, and select **user name** from the list.

17. Click the Print User tab.

18. Under **Charge information**, select **Charges: Overdue** and **Format: Brief**.

19. Click **Schedule**.

20. Click **Schedule** to schedule the report to run **ASAP**.
Exercise 11

1. Click the Configuration module toolbar.
2. Click the OPAC Configuration toolbar.
3. Click the Gateway database configuration wizard.
4. Select IBISTRO, and click Modify.
5. Double-click the Knowledge Portal folder.
6. Double-click the Z39.50 Sites folder.
7. Click Create.
8. In the Name box, type EMORY.
9. In the Description box, type Emory University.
10. Select Z3950_SRCH from the type list.
11. On the Basic tab, select the following STAFF from the User hierarchy level list.
12. Select HIDDEN from the Element status list.
13. For Available clients for access, select only WorkFlows.
14. Click the Destination tab.
15. In the Domain name box, type libcat1.cc.emory.edu.
16. In the Port box, type 2200.
17. In the Database name box, type Symphony.
18. Select SIRSI_CAT from the Format list.
19. For Presentation type, select Single Field.
20. Select UNICRN_STD from the Z3950 search mapping list.
21. For Z3950 operation, select Search.
22. Click to clear the Authentication needed check box.
23. Select USMARC from the Z3950 record syntax list.
24. Click the Search Field tab.
25. Select ANY, AUTHOR, TITLE, SUBJECT, ISBN, ISSN, and SERIES from the Name lists.
26. Leave the Search key fields blank.
27. Select AND from the Operator lists.
28. Click Save.
29. Click **Cancel** to exit the wizard.

30. After a halt and run (stop/start) of the Symphony Services, the Emory University library catalog should be searchable via SmartPort.
Exercise 12

1. Click the **Configuration** module toolbar.
2. Click the **OPAC Configuration** toolbar.
3. Click the **Gateway database configuration** wizard.
4. Select **IBISTRO**, and click **Modify**.
5. Double-click the **Knowledge Portal** folder.
6. Double-click the **Z39.50 Sites** folder.
7. Click **Create**.
8. In the **Name** box, type **METROBOS**.
9. In the **Description** box, type Metro Boston Library Network.
10. Select **Z3950_SRCH** from the **type** list.
11. On the Basic tab, select the following **STAFF** from the **User hierarchy level** list.
12. Select **HIDDEN** from the **Element status** list.
13. For **Available clients for access**, select only **WorkFlows**.
14. Click the Destination tab.
15. In the **Domain name** box, type **mbln.lib.ma.us**.
16. In the **Port** box, type **210**.
17. In the **Database name** box, type **MARION**.
18. Select **BIBMARC** from the **Format** list.
19. For **Presentation type**, select **Single Field**.
20. Select **DRACLASSIC** from the **Z3950 search mapping** list.
21. For **Z3950 operation**, select **Search**.
22. Click to clear the **Authentication needed** check box.
23. Select **USMARC** from the **Z3950 record syntax** list.
24. Click the Search Field tab.
25. Select **ANY, AUTHOR, TITLE, SUBJECT, ISBN, and ISSN** from the **Name** lists.
26. Leave the **Search key** fields blank.
27. Select **AND** from the **Operator** lists.
28. Click **Save**.
29. Click **Cancel** to exit the wizard.

30. After a halt and run (stop/start) of the Symphony Services, the Metro Boston Library Network catalog should be searchable via SmartPort.
Appendix B – Symphony Offline

**Overview**

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 a PC and automatically transferred to the server. The Load Offline Transactions report applies the transaction files to the Symphony database.

**Preparing GUI Offline Data**

You must run the Prepare GUI Offline Data report (`prepstand`). This report is found in the Administration group of reports. You should run this report before any scheduled down times, or set up to run daily in case of unscheduled down times.

**Updating Delinquent User File**

The Update User Delinquency Status and the Update Select User Delinquency Status reports include an option called “Generate list of delinquent users.” This option prompts the user to choose whether to produce a file of delinquent users.

With patron delinquency information available in Offline mode, the system will display a message, alerting staff if the patron is delinquent, and blocking checkout if the patron is blocked or barred. This optional feature can be used at your library’s discretion.

The file is automatically downloaded to the WorkFlows each time you log into the workstation. The file provides the staff with information regarding delinquent users while using Offline. The workstation operator can determine if a patron is blocked or barred from library use. This prevents some transactions from failing when the transaction data log files are loaded onto the Symphony server.


# Offline Toolbar

<table>
<thead>
<tr>
<th>Button Image</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Offline Session" /></td>
<td>Offline Session</td>
</tr>
<tr>
<td><img src="image" alt="New User Registration" /></td>
<td>New User Registration</td>
</tr>
<tr>
<td><img src="image" alt="Checkout" /></td>
<td>Checkout</td>
</tr>
<tr>
<td><img src="image" alt="Discharge/Checkin" /></td>
<td>Discharge/Checkin</td>
</tr>
<tr>
<td><img src="image" alt="Renew Single Item" /></td>
<td>Renew Single Item</td>
</tr>
<tr>
<td><img src="image" alt="Renew Reserve" /></td>
<td>Renew Reserve</td>
</tr>
</tbody>
</table>
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 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 information is stored.
- Data recorded by Offline will be copied from the hard drive to the server automatically on the next connection to the server. The system administrator will run the Load Offline Transactions report, which will then try to perform each recorded transaction as if a library operator were at a regular workstation. Errors result when an activity recorded at an offline workstation would have been blocked or would otherwise fail when done in a real Symphony database.
To circulate materials using Offline

1. Double-click the WorkFlows shortcut on your desktop. The Configuration window appears:

![Configuration Window]

2. Click the **Operate in Offline mode** check box.
3. Click **OK**. This opens the WorkFlows client.
4. Click the Offline module toolbar. The Common Tasks toolbar appears.
**Offline Session Settings Wizard**

1. On the Common Tasks toolbar, click the **Offline Session** Settings wizard. The following window appears:

   ![Offline Session Settings Window](image)

   - **Review Settings Each Session**
   - **User access:** CIRC
   - **Library:**
   - **Current date:** 09/19/2005
   - **Current time:** 12:11
   - **Default due date:**
   - **Log directory:** C:\Documents and Settings

   **User status generated on:**
   - Mon Sep 19 00:20:13 2005
   - Use user delinquent list file

2. In the **User access** box, select the user access to associate with the offline transactions, typically **CIRC**. This is a required entry.

   **NOTE** Customers using a 2003.1 server or upgrading from a 2003.1 or older server may use the delivered STANDALONE user access.

3. In the **Library** list, select the name of your library. This is a required entry.
4. In the **Current date** and **Current time** boxes, accept the default values.

5. Click the **Default due date** gadget, and select a date from the calendar if you want the same due date for all materials.

   - **Or** -

   Leave this field blank and WorkFlows will calculate the due date when you load offline transactions to the server.

6. The **Log directory** box displays the path destination where the WorkFlows client writes the transaction log for all activities performed with the Offline toolbar. Accept the default, or click the gadget to select a different path.

7. Click the **Use user delinquent list file** check box if the file was recently generated.

8. Click **OK**, or press ENTER to accept the settings.
**Offline New User Registration Wizard**

Use the Offline New User Registration wizard to register a new user for your library.

**To set the New User Registration properties**

As in regular WorkFlows circulation, you can change certain defaults for the New User Registration wizard using the Property window.

The New User Registration wizard allows you to set the following properties:

1. In the **User library** list, select the library you want to associate with the new user record. The library you choose will be the library associated with the transactions that are finally loaded.

2. In the **User department** list, select the department you want to associate with the new user record. This entry is optional. You can configure it not to display.
3. In the **User profile** list, select the User Profile policy name. The User Profile policy determines the user’s privileges, for example, STUDENT. This field also determines the user’s loan period and fine rate. When creating a user, this field is required.

4. Click **OK** to save your changes.

**To register a new user**

1. On the **Common Tasks** toolbar, click the **New User Registration wizard**. The User Registration window appears:

2. Type information about a user and his or her access in the User Information tab.

3. Use the User address and User extended information tabs to add additional information, such as notes and comments.

4. When you finish entering information, click **OK** to save your changes.
Offline Checkout Wizard

To checkout an item to a user

1. On the Common Tasks toolbar, click the Checkout wizard. The following window appears:

2. Scan the barcode from the user’s card, or type the user ID and press ENTER.

3. If needed, click the ALT due date gadget to set a different due date than the one you set in the session settings.

4. Scan the barcode on the item, or type the item ID and press ENTER.

5. Continue entering barcodes until all items are checked-out.
6. When finished checking out to this patron, click **Cancel**.

7. Repeat these steps as needed for additional patrons.

**Notes**

- If an item already checked out to a patron is charged by that patron again, the item will be renewed for that patron when the transactions are uploaded.

- If an item is already checked out to a patron, then checked out by another patron, the item is discharged from the original patron and checked out to the new patron when the transactions are uploaded.

- If a workstation has a receipt printer, you can use the **CheckOut**, **Renew Item**, or **Renew Reserve** wizards on the Offline toolbar to print date due slips.
**Offline Discharge/Checkin Wizard**

**To check-in an item**

1. On the **Common Tasks** toolbar, click the **Discharge/Checkin** wizard. The Discharging window appears:

2. Scan the item’s barcode, or type the **Item ID**.
3. Click the **Date of discharge** gadget, and select a date.
4. Click **OK** to complete discharge of the item.
5. After all items for a user have been checked-in, click **Cancel** to close the wizard.
Offline Renew Single Item Wizard

To renew an item

1. On the Common Tasks toolbar, click the Renew Single Item wizard. The Renew Item window appears:

2. Scan the item’s barcode, or type the item ID.
3. If needed, click the Alt due date gadget to set a different due date than the one you set in the session settings.
4. Click OK to complete renewal of an item.
5. Continue entering barcodes until all items are renewed.
6. Click Cancel to close the wizard.

NOTE If a workstation has a receipt printer, you can use the Checkout, Renew Single Item, or Renew Reserve wizards on the Offline toolbar to print date due slips.
Offline Renew Reserve Wizard

The **Offline Renew Reserve** wizard extends the loan period on a reserve item. Because the reserve copy is currently checked out to the user requesting a renewal, the amount of time the copy can be borrowed is simply extended.

**To change the wizard properties**

As in regular WorkFlows circulation, you can change certain defaults for the Renew Reserve wizard using the Property window:

![Renew Reserve: Property Window](image)

In the **Reserve Desk** list, select the reserve desk you want to use for renewals. The list that displays is specified in your library’s policies. If no values display in the Reserve Desk list, run the Prepare GUI Offline Data report.

**To renew a reserve item**

1. On the **Common Tasks** toolbar, click the **Renew Reserve** wizard. The Renew Reserve window appears:
2. Scan the item’s barcode, or type the Item ID.

3. If needed, click the Alt due date gadget to set a different due date than the one you set in the session settings.

4. In the Reserve Desk list, select the desk.

5. Click OK to complete renewal of the reserve item.

6. After all reserve items for a user have been renewed, click Cancel to close the wizard.

NOTE If a workstation has a receipt printer, you can use the Checkout, Renew Single Item, or Renew Reserve wizards on the Offline toolbar to print date due slips.
Loading Offline Transactions

The recorded data from each workstation is uploaded to the host computer automatically the next time you log into WorkFlows by connecting to the server.

Run the Load Offline Transactions (loadstand) report to upload the transaction files to the Symphony database. Transactions that failed are reported, as well as log lists of successful loads.

This report consolidates, concatenates, and sorts the transactions by date. The report includes both failed transactions and successful loads. The number of logs printed will be twice the number of failed transactions because both the request and response are logged by this report. If a corrupt file causes the Load Offline Transactions report to terminate, a warning message is included in the report log.
Schedule the Load Offline Transactions Report

**CAUTION** The workstation server must be running to schedule and run this report, or the report will fail. Do not halt the workstation server until the report displays on the finished list.

**To schedule the report**

1. On the **Reports** module toolbar, click the **Schedule New Reports** wizard. The Display Template Reports window appears.
2. Click the Administration tab.
3. Double-click **Load Offline Transactions**. The following window appears:

![Schedule Window](image)

4. Change or add information, as needed, and click **Schedule**.

5. Schedule the report to run **ASAP** or on a regular basis.

6. Click **Schedule**. A schedule confirmation window appears.

7. Click **Close**.
To view the completed report

1. On the Reports module toolbar, click the Finished Reports wizard. The Display Finished Reports window appears:

2. Select the Load Offline Transactions report from the list, and click View. The View Finished Reports window appears.

3. Accept the defaults and click OK. The report will open in the word processing application designated by your report properties. The report lists failed transactions only. Offline transactions may not load for the same reasons that daily circulation functions fail.
The following reasons commonly cause standalone transactions to fail:

- User not found
- Item not found

**NOTE** Offline transactions will be incorporated into monthly statistics when the Statistics Log report is run.

**Sample Log from a Load Standalone Transactions Report**

<table>
<thead>
<tr>
<th>Report Log for Standalone Transactions Loaded</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report loadstand scheduled as Load Standalone Transactions</td>
</tr>
<tr>
<td>Load standalone transactions.</td>
</tr>
</tbody>
</table>

UNICORN application program interface server v2003 started on Wednesday, December 17, 2003, 10:13 AM
Transactions will be read from standard input.
Reply transactions will be written to standard output.
Error requests and responses will be logged in d:/Sirsi/Unicorn/Standalone.
History logging of requests will be in d:/Sirsi/Unicorn/Logs/Hist.
No system logging will be done.
6 transaction(s) read.
1 transaction(s) failed.
UNICORN application program interface server finished on Wednesday, December 17, 2003, 10:13 AM

UNICORN log printing v2003 started on Wednesday, December 17, 2003, 10:13 AM
Log transactions will be read from standard input.
The report will be written to standard output.
2 log record(s) printed.
UNICORN log printing finished on Wednesday, December 17, 2003, 10:13 AM

Log Listing
Produced Wednesday, December 17, 2003 at 10:13 AM

12/16/2003,16:36:16 Station: 0006 Request: Sequence #: 01 Command: Charge Item Part B
station library:ROCKEFELLR user access:STANDALONE item ID:3867401225638
user ID:50764010000925 master override: Max length of transaction response:200
000 log format time:20031216163616

12/16/2003,16:36:16 Station: 0006 Response: Sequence #: 01 Command: *ERROR*
message:Privilege has expired message number:92 workstation operator alert:1
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