INFOhio SirsiDynix K12 Manual

Symphony 3.3
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Cat & Cat Jr.
Section 2

2.1 Searching with Cat Jr.

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Hi!

I’m CAT Jr. - INFOhio’s online catalog just for kids! Let me help you find things in your library!

First, find your school. Then, click on me!

Basic Search

Type the topic you are looking for in the box.

Enter words:
You may also select:

**Item Group** will help you find a TRUE book (select NONFICTION or BIOGRAPHY), or a STORY book (select EASY or FICTION). Select ANY and you will get a list of all books, both story books and true books.

**Sort options** will put the titles in alphabetical order (a,b,c), or put the newest items in your library at the top of the list (New to Old).

Click on the picture for the type of search you want.

**Author** - type the author’s name.  

**Title** - just one or two words will do!  

**Subject** - find books about things.  

**Series** - type the name of a series to get a list of titles from that series in your library.  

**All Fields**- not sure what search type to choose? Use this!
Let's search for “space” using All Fields search, NONFICTION item group, NEW books first sort:

This is what you see next.

I tell you:
1. how many items match your search.
2. where you can find them in your library. 
   (E = Easy section; B = Biography)
3. more information about the book. The titles are in blue. If you click on a title you will get the full record.
4. what the cover of the book looks like.
5. if it's a book, video, computer disk, etc.
6. if you can check them out. Copy Available or No copies on shelf).
7. **Previous/Next** will move you through the list.

8. **Try Again** will take you to a search screen, but you'll still be able to see what you typed the last time - check what you entered!!

9. **Go Back** will take you back to the Brief Search screen. Then you can do another search or get me ready for the next person.

**Need help with spelling?**

**If you spell a word wrong...**

1. Click on the little arrow.
2. Choose the right word.
3. Click SEARCH.
You will see your list.

<table>
<thead>
<tr>
<th>#1</th>
<th>567.9 NOR</th>
<th>Dinosaur. 1st American ed.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Norman, David, 1930-</td>
<td></td>
</tr>
<tr>
<td></td>
<td>63 p. : col. ill. ; 29 cm.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>No Copies on Shelf</td>
<td>See why.</td>
</tr>
<tr>
<td></td>
<td>1989</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>#2</th>
<th>E FIC JOY</th>
<th>Dinosaur Bob and his adventures with the family Lizardo. 1st ed.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Joyce, William.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>No Copies on Shelf</td>
<td>See why.</td>
</tr>
<tr>
<td></td>
<td>1988</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>#3</th>
<th>629.22 STR</th>
<th>Dinosaur-cars</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Struthers, John.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1977</td>
<td></td>
</tr>
</tbody>
</table>

Also Try this

Type the first few letters of the word and then a dollar sign $.  
(Hold the shift key and type the number 4 at the top of the keyboard to make it.) You could do this for dinosaur.

Enter words: dino$
1. Click on Reading Programs Search.
2. Select Reading Program Search button or Lexile search button.
3. Use the little arrow to choose Accelerated Reader or Reading Counts.
4. Use the entry box to choose your reading level.
5. Use the entry box to choose points you want.
6. Type your search term.
7. Click Show Matching Books.
Using the Visual Search

1. Choose

2. Choose a topic.

3. Narrow the topic.
4. See the books in your library!

1. Go to BIG Cat 2.0

2. Online help

3. Logout to Library Login page
Searching with CAT

1. **Click** on the CAT 2.0 link.

2. **Quick Search** screen displays.

3. **Toolbar** – displays options.

4. **Help** - provides directions for the displayed screen.

5. **Log Out** – returns to opening page.

6. **Special Searches** (click **Reading Level Search** to find **Reading Program** and **Lexile** searches)

7. **INFOhio Resources**

8. **Review My Account** - Some schools may allow you to view your library record. Ask your librarian if this is available for your school.

9. **Suggestion Box** – Please provide suggestions to continue refining this search tool.

10. **Library** – “HERE” is library you are logged in to

11. **Sort By** – allows you to sort your results as shown.
12. **What Others are Reading** – includes Hottest Titles, Authors, and Subject from your library. Click on More Items to locate additional items.

13. **Recommended Reading** – provides recommended reading lists.

14. **Best Sellers** – Best Seller lists from major reviewers.

### What Others Are Reading

<table>
<thead>
<tr>
<th>Hottest title:</th>
<th>ABC cat</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hottest author:</td>
<td>Rowling, J. K.</td>
</tr>
<tr>
<td>Hottest subject:</td>
<td>Alphabet</td>
</tr>
</tbody>
</table>

### Recommended Reading

<table>
<thead>
<tr>
<th>Buckeye Children’s Book Award of Ohio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caldecott Medal (Children’s)</td>
</tr>
<tr>
<td>Newbery Medal (Children’s)</td>
</tr>
<tr>
<td>Alex Award (YA)</td>
</tr>
<tr>
<td>IRA Children and Young Adult Book Awards</td>
</tr>
</tbody>
</table>

### Best Sellers

<table>
<thead>
<tr>
<th>Best Sellers</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York Times Children’s Picture Book</td>
</tr>
<tr>
<td>New York Times Children’s Chapter Book</td>
</tr>
<tr>
<td>New York Times Fiction</td>
</tr>
<tr>
<td>New York Times Nonfiction</td>
</tr>
<tr>
<td>Publishers Weekly Children’s Fiction</td>
</tr>
<tr>
<td>More best seller lists</td>
</tr>
</tbody>
</table>

(at BOTTOM of Quick search page)
There are eight basic search options:

1. QUICK SEARCH - allows simple searches for items, defaults to your library.
2. ADVANCED SEARCH - search for items in any library in your school district and allows more search options.
3. VISUAL SEARCH 4 KIDS – search by topic using pictures.
4. OTHER RESOURCES – Includes links to area media center, the INFOhio electronic resources, other electronic resources, public libraries and access to Ohio Statewide resource sharing.
5. BROWSE CALL NUMBERS – A Browse search is like walking through the “shelves” in the library. It lets you see items that are next to each other on the shelf.
6. BROWSE HEADINGS – groups subject headings to give you additional searching terms.
7. READING LEVEL SEARCH (special searches link) – search by Reading Program (Accelerated Reader, Reading Counts), Reading Level, or Points in the Reading Program.
8. LEXILE SCORE SEARCH (special searches link) – search by lexile range.

Quick Search:

1. Select search type by clicking the appropriate radio button.
2. Enter your search term.
3. Select item group, if desired, to filter by item group.
4. Sort by, author, subject, title, relevance, old to new, or new to old, or leave default for none.
5. Click on the search type. Press [enter] if the search type you want is already selected (by default “all fields” is selected).
6. Previous Searches allows you to review or launch a previous query.
7. Back takes you back to your last screen.
8. Help will open online help information.
9. Logout will end your search session.
Search Results screen displays.

1. Click on the Title or Show Details button to select desired title.

2. Click the options you wish to display, available from Search results, Details, or Show Me screen.
   a. Author Biography
   b. Summary
   c. Review
   d. Table of Contents
   e. CLCD Review

3. Click the Next and Back buttons to move through search results.
4. Or Click the appropriate tab to view Brief Description, A Look Inside, or Full Description.
Advanced Search:

Further define your search based on criteria configured by your library. You may select as many or as few options as you wish to narrow your search.

1. For a combined search, **Enter** the search topic in the appropriate search type boxes and select the appropriate Boolean operators.

2. **Select** a library or all libraries in your school district to search.

3. Limit the search, if you wish, by language, item group, material type, funding source or pub year. You may select one criterion in each area.

4. **Select** the sort by option, using the drop down menu.

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**Search Results**

Keyword "mississippi" AND Author "twain" search found 6 titles.

Keep All on this Page

#1  
**VC TWA**

Tom and Huck [videorecording]
Mark, Lauraoga.  
Burbank, Calif. : Distributed by Buena Vista Home Entertainment, [2002]  
1 videodisc (ca. 92 min.) ; sd., col. ; 4 3/4 in.

Copies at Available Total
TEST Elementary School 1 1  

#2  
**FIC TWA**

The adventures of Tom Sawyer
Twain, Mark, 1835-1910  
238 p. : ill. ; 21 cm.

Copies at Available Total
TEST DLMS Middle School 1 1  

#3  
**FIC TWA**

The adventures of Huckleberry Finn  
Bantam classic ed.

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Tips and Tricks

**Entering a search**

1. **Author** – author can be entered with either *first or last name* first.
2. **Title** - You do not need all the words - leave out "a," "and," "the," etc.
3. **Combination Searching** – Some combination searches to use: Author, Subject, Title
   
   Connect them with the Boolean operators AND, OR, and NOT.

   *Author* twain AND *subject* Mississippi = books by Mark Twain that are about the Mississippi.
   *Author* twain OR *subject* Mississippi = all items written by Mark Twain and all items about the Mississippi.
   *Author* twain NOT *subject* Mississippi = items written by Mark Twain but not about the Mississippi.

4. **Limiting a search** - click on the arrow and highlight your preferences - pick a language, an item group, material type, funding source, match on (keyword, left to right, exact content), pubyear (ex. >1990, <2007 or =2005) and/or a sort order. This would be a good way to limit your results to recent videos, old maps, or anything from the 50's.

**Visual Search 4 Kids:**
Allows a topical search of items in your school’s libraries.

![Visual Search 4 Kids](image-url)
Other Resources:
Includes links to area media center, the INFOhio electronic resources, other electronic resources, public libraries and access to Ohio Statewide resource sharing.

- Search Area Media Centers – links to the INFOhio web site and the available Media Center Collections.
- INFOhio Electronic Resources – links to the INFOhio web site Core collections of Electronic Resources.
- Other Electronic Resources – is a link to other INFOhio Electronic Resources.
- Find Area Public Libraries – is a list of links to public libraries.
- Ohio Statewide Resource Sharing – is a link to MORE libraries.

Reading Level Search:

1. Special Searches (located on top/right of Quick Search screen) – **Click** Reading Level Search.
2. **Select** Reading Program Search by highlighting the appropriate radio button.
3. **Select** Accelerated Reader or Reading Counts program.
4. **Select** “check for tests”, (if enabled).
5. **Select** the reading level range.
6. **Select** the reading points range.
7. **Enter** a search term, if desired.
8. **Choose** library.
Lexile Score Search:

1. Special Searches (located on top/right of Quick Search screen) – **Click** Reading Level Search.
2. **Select** Lexile Score Search by highlighting the appropriate radio button...
3. **Enter** the lexile score range.
4. **Enter** a search term if desired.
5. **Choose** library.
Spell Checker

1. Search term is misspelled:

2. Browse list displays, with suggestions for other possible spellings (drop-down list):
The Results

1. The brief record list will display title, author, and shelf number.
2. You may sort the items in your brief record list by author, subject, title, relevance, old to new, or new to old.
3. To see the Full Record, click on the title or the Show Details button and then choose the Full Description tab.
4. Full description may contain hypertext links to related subjects and titles by the author.
5. When the Full Record displays, click Back on the menu bar. This will return you to the Search Results page.

Results Features

1. Back takes you back to previous screen.
2. Help is online and delivered by SirsiDynix.
3. Limit Search pops you to bottom of current page where you can “revise” your search and resubmit.
4. New Search will return you to quick search.
5. Next allows you to display the next record in the results list.
6. XRef allows you to view cross references from Search Results.
7. Kept navigates to the kept list
8. Logout logs out the session.
9. **Find more by this author** allows you to locate other titles.

10. **Find more on these topics** allows you to locate similar items.

11. **Nearby items on shelf** allows you to “browse” the shelf as if in a library.

12. **Try these too** allows you to view cross-references.

13. **Search also under** provides additional subject term references.

14. **You Found Titles in Categories** provides areas of interest and can help refine results.

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**Using the Keep Feature**

*Click* the *Keep* button to select titles from your brief results list or on the brief description view of the item. Once you click the *Keep* button, the button changes to *Kept*.

1. You can search for titles from your own library or other libraries.

2. You can add all items from a results list at once by selecting *Keep All on this Page* at the top of the page.

3. You can *Place a Hold* from OPAC, if library policy allows.
View your Kept List:

1. **Click** the *Kept* feature from the menu bar to see your selected items.
2. **Sort** your list using the *Sort by:* drop down menu, you may choose to sort titles by author, title, or call number.
3. **Click** *Type of List* to choose Full or Brief display.
4. **Click** Remove Checked Titles to delete unwanted titles,
5. **Click** Remove all titles to clear your Kept list.

6. **Click** *View/Print* to display the bibliographic information.
7. **Email Citation List**

Some schools have chosen to allow students to email these lists. Check with your librarian to see if this option is turned on for your school.

[Image of email citation list interface]

**My Account** features – must be enabled in library policies, check with Librarian. (For details, see Section 2.2T – tip sheet – “How to Use My Account”.)
<table>
<thead>
<tr>
<th>Boolean Operators</th>
<th>Workflows</th>
<th>Web2</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AND</strong> – locates records containing all specified terms</td>
<td>Using General search: Rocks and minerals Will yield titles with the word rocks and the word minerals anywhere in any indexed field in the record. To search for phrase “rocks and minerals” enclose the words in double quotes.</td>
<td>Using All Fields search: Rocks and minerals Will yield titles with the word rocks and the word minerals in any indexed field in the record. To search for phrase “rocks and minerals” enclose the words in double quotes.</td>
</tr>
<tr>
<td><strong>NOT</strong> – locates records containing the first search term but not second</td>
<td>Using General search: Science not fiction Will yield titles with the word science but not the word fiction anywhere in any indexed field in the record. To phrase search, enclose in double quotes.</td>
<td>Using All Fields search: Science not fiction Will yield titles with the word science but not the word fiction anywhere in any indexed field in the record. To phrase search enclose in double quotes.</td>
</tr>
<tr>
<td><strong>OR</strong> – Locates records matching any or all of the specified terms</td>
<td>Using General search: help or hindrance Will yield titles with the word help or the word hindrance anywhere in any indexed field in the record. To phrase search, enclose in double quotes.</td>
<td>Using All Fields search: help or hindrance Will yield titles with the word help or the word hindrance anywhere in any indexed field in the record. To phrase search, enclose in double quotes.</td>
</tr>
<tr>
<td><strong>XOR</strong> – locates records matching any one but not all of the specified terms</td>
<td>Using General Search: Science xor fiction Will yield titles with the word science or the word fiction but not both words anywhere in any indexed field in the record. To phrase search, enclose in double quotes.</td>
<td>XOR Boolean operator is not available to be used in Web2.</td>
</tr>
<tr>
<td>Positional Operators</td>
<td>Example Query</td>
<td>Example Result</td>
</tr>
<tr>
<td>---------------------</td>
<td>--------------</td>
<td>---------------</td>
</tr>
<tr>
<td><strong>SAME</strong> - Locates records in which a single MARC tag field contains all specified terms</td>
<td>Using General search: Small NEAR2 berenstain</td>
<td>Will yield titles with the word small within 2 words of the word berenstain in any MARC field.</td>
</tr>
<tr>
<td><strong>WITH</strong> - locates records in which field contains a phrase with all of the specified terms in particular order</td>
<td>Using All Fields or Special CCL search: Small adj2 berenstain</td>
<td>Will yield titles with the word small found at within two words before the word berenstain in any MARC field.</td>
</tr>
<tr>
<td><strong>NEAR</strong> n - locates records in which field contains all search terms in no particular order</td>
<td>Using General search: Small NEAR2 berenstain</td>
<td>Will yield titles with the word small within 2 words of the word berenstain in any MARC field.</td>
</tr>
<tr>
<td><strong>ADJ</strong> n - locates records in which field contains all search terms in order</td>
<td>Using All Fields or Special CCL search: Small adj2 berenstain</td>
<td>Will yield titles with the word small found at within two words before the word berenstain in any MARC field.</td>
</tr>
</tbody>
</table>

**NOTE**: n indicates a number can be used for proximity searching.

<table>
<thead>
<tr>
<th>Relational Operators</th>
<th>Example Query</th>
<th>Example Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;=  - Less than</td>
<td>WF: General - {pbyr}&lt;1950</td>
<td>Titles with a publication year less than 1950</td>
</tr>
<tr>
<td>&gt;  - Greater than</td>
<td>Web2: Special CCL - (PBYR)</td>
<td>Titles with a publication year greater than 2001</td>
</tr>
<tr>
<td>=  - Equal to</td>
<td>Web2: General - {pbyr}=2003</td>
<td>Titles published in 1994, but does not include titles published in 2003</td>
</tr>
<tr>
<td>&lt;&gt; - Not equal to</td>
<td>Web2: General - {pbyr}&gt;1999 and {pbyr}&lt;&gt;2003</td>
<td>Titles published in 1994 or earlier</td>
</tr>
<tr>
<td>&lt;=  - Less than or equal to</td>
<td>Web2: General - {pbyr}&lt;=1949</td>
<td>Titles published in 2000 or after</td>
</tr>
</tbody>
</table>

The operator SAME does not work in keyword searches.
<table>
<thead>
<tr>
<th>Special Characters used in Searches</th>
<th>Example Query</th>
<th>Example Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;&quot; [double quotes] – denotes a single phrase search which must match in the same adjacent order. ** [single quotes] – used by workflows</td>
<td>WF: Title – gold rush vs. ‘gold rush’ Web2: “gold rush” vs. gold rush</td>
<td>Titles with the word “gold” and the word “rush” in the title fields vs. titles with the words “gold rush” in the title fields</td>
</tr>
<tr>
<td>() [parentheses] – allow search expressions to be grouped. The innermost set of parentheses is executed first.</td>
<td>WF: Subject - dogs or (DOG ADJ BREEDS) Web2: Adv. All Fields – su dogs or (su dog adj su breeds)</td>
<td>Titles with subjects on dog breed or just dogs</td>
</tr>
<tr>
<td>{ } [curly braces] – allows you to search specific Sirsi entries which have been indexed.</td>
<td>WF: General - pumpkinhead {505} Web2: Special CCL – pumpkinhead (505)</td>
<td>Title “Nightmare hour”</td>
</tr>
<tr>
<td>? and $ - allows for substitution of a single character, $ allows for truncation of multiple characters.</td>
<td>WF: Title - cabin$ Title – so?p Web2: Title – cabin$ Title – so?p</td>
<td>Titles with “cabin”, “cabins”, and “cabinet”. Titles with “soap” and “soup”.</td>
</tr>
<tr>
<td>[space] – must be used to separate numbers if they are to be searched separately.</td>
<td>WF: General – 32 10010 (readprog) Web2: Special CCL – 32 10010 (READPROG)</td>
<td>Looking for a value of 32 and also a value of 10010 in the reading program special tag. Titles for grade level 3.2 worth one point.</td>
</tr>
<tr>
<td>, [comma] - used to search numbers in their concatenated form, replaced by space in alphabetic search</td>
<td>WF: no example. Will search 1,2,3,4,5 as a single term Will search “dog, cat” as “dog cat”</td>
<td></td>
</tr>
<tr>
<td>. [period] – replaced with a space in a search unless numeric, then assumed to be a decimal point</td>
<td>WF: no example. Will search “3.2” as a single term Will search “a.b” as “a b”</td>
<td></td>
</tr>
<tr>
<td>- [hyphen] - to search with the hyphen included, same words without the hyphen will yield hyphenated words as well a non-hyphenated.</td>
<td>WF: General - hound-dog vs. hound dog Web2: All Fields – same results</td>
<td>Records with “hound-dog” vs. records with “hound and dog” and “hound-dog”.</td>
</tr>
<tr>
<td>‘ [apostrophe] - is ignored</td>
<td>WF: Title – don’t vs dont Web2: Title – don’t vs dont</td>
<td>Yields same titles</td>
</tr>
<tr>
<td>Access Points</td>
<td>Web2 Index Name</td>
<td>MARC Tags Searched</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-----------------</td>
<td>-----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Author</td>
<td>AU</td>
<td>100, 110, 111, 700, 710, 711, 800, 810, 811</td>
</tr>
<tr>
<td>Curriculum Alignment</td>
<td>CURR (is not currently working in Web2)</td>
<td>658</td>
</tr>
<tr>
<td>Periodical</td>
<td>N/A</td>
<td>780, 785</td>
</tr>
<tr>
<td>Sel</td>
<td>N/A</td>
<td>594, 595 (indexed, but obsolete in both WF and Web2)</td>
</tr>
<tr>
<td>Reading Program</td>
<td>READPROG</td>
<td>595 (from 526 contents)</td>
</tr>
<tr>
<td>Series</td>
<td>SER</td>
<td>400, 410, 411, 440, 490, 830, 840</td>
</tr>
<tr>
<td>Subject</td>
<td>SU</td>
<td>600, 610, 611, 630, 650, 651, 690, 691</td>
</tr>
<tr>
<td>Title</td>
<td>TI</td>
<td>130, 210, 245, 246, 247, 440, 505, 586, 730, 740</td>
</tr>
<tr>
<td>Author Browse</td>
<td>AU</td>
<td>100, 110, 111, 700, 705, 710, 711, 715, 720, 770, 800, 810, 811, 830, 840</td>
</tr>
<tr>
<td>Periodical Title Browse</td>
<td>N/A</td>
<td>780, 785</td>
</tr>
<tr>
<td>Series Browse</td>
<td>SER</td>
<td>400, 410, 411, 440, 490, 760, 800, 810, 811, 830, 840</td>
</tr>
<tr>
<td>Subject Browse</td>
<td>SU</td>
<td>600, 610, 611, 630, 650, 651, 655, 656, 658, 690, 691</td>
</tr>
<tr>
<td>Title Browse</td>
<td>TI</td>
<td>130, 222, 240-247, 440, 630, 730, 740</td>
</tr>
<tr>
<td>Web2 filters</td>
<td>Web2 Name</td>
<td>Sirsi K-12 Field</td>
</tr>
<tr>
<td>-----------------</td>
<td>-----------------------------</td>
<td>------------------------------------------------------</td>
</tr>
<tr>
<td>Collection</td>
<td>Material_filter</td>
<td>Item Group/Type</td>
</tr>
<tr>
<td>Material Type</td>
<td>Item_category1_filter</td>
<td>Material Type</td>
</tr>
<tr>
<td>Date</td>
<td>Date_filter</td>
<td>Sirsi PubYear (008 date1 or 008 date2 or 260</td>
</tr>
<tr>
<td>Language</td>
<td>Language_filter</td>
<td>Sirsi Language Policy (using subset)</td>
</tr>
<tr>
<td>Funding Source</td>
<td>Item_category2_filter</td>
<td>Funding Source</td>
</tr>
<tr>
<td>Librarian’s Choice</td>
<td>Bulletin_name_filter – currently not used</td>
<td>Librarian Reference Policy + 598 contents</td>
</tr>
<tr>
<td>Record Format</td>
<td>Format_filter – not using</td>
<td>For INFOhio only the MARC-type catalog formats</td>
</tr>
<tr>
<td>Location</td>
<td>Location_filter</td>
<td>Home Location for INFOhio always AVAILABLE</td>
</tr>
<tr>
<td>Sort Order</td>
<td>Sort_by_filter</td>
<td>Initial sorting of list, none, au, ti, su, pbyr, -pbyr</td>
</tr>
<tr>
<td>Library</td>
<td>Location_group_filter</td>
<td>Library or Search Library – replaces branch search target in Web2</td>
</tr>
</tbody>
</table>

**Web2 Stopwords – these words are typically ignored during searching.**

A, AN, AS, AT, BE, BUT, BY, DO, FOR, IF, IN, IT, OF, ON, THE, TO

If a title is comprised of all stopwords, place double-quotes around the title for successful searching.
CAT 2.0 Have you read?

Librarian Favorites - Allows librarian to hand-select titles to suggest to readers; a link to them appears on the basic search screen in CAT 2.0.

<table>
<thead>
<tr>
<th>What Others Are Reading</th>
<th>Have you Read?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hottest title:</td>
<td>none</td>
</tr>
<tr>
<td>Hottest author:</td>
<td>none</td>
</tr>
<tr>
<td>Hottest subject:</td>
<td>none</td>
</tr>
</tbody>
</table>

Procedure:

1. **Notify** your ITC to turn on “Librarian Favorites”. *ITC staff will need one day prior notification to set necessary policies/reports.*
2. **Scan** the items using the Inventory Item Wizard located under the Special Circulations functions to identify the records you want to add to your list:
3. **Generate** from the Info Desk tab the “Add Items to Item List” report.
   a. Basic tab – change name of report to “Add Items to FAV list”.
   b. From the Information Desk tab:
      Select FAV from drop down menu. Select “Item” radio button.
   c. From the Item selection tab:
      Enter your library. Use the Date Inventoried gadget to select “The date this report will be run” as Start Date.
   d. **Save** report as a template.
   e. **Generate** the report and this will update the opac. Old favorites will be removed and new ones added. The updated list will appear in CAT the next day.

**NOTE:** If for some reason you cannot inventory the items and generate the report the same day, you’ll need to change the “Date inventoried” on the Item Selection tab.
CAT 2.0 Have you read?

New Books

This report will let you generate a list of new titles in your library. A link to the new titles will appear on the basic search screen in CAT 2.0. You may run this report whenever you want to update the list, or you can schedule it to run periodically.

<table>
<thead>
<tr>
<th>What Others Are Reading</th>
<th>Have you Read?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hottest title:</td>
<td>From</td>
</tr>
<tr>
<td>Hottest author:</td>
<td>Anderson, Laurie Halse</td>
</tr>
<tr>
<td>Hottest subject:</td>
<td>High schools--Fiction.</td>
</tr>
<tr>
<td>Librarian Favorites</td>
<td></td>
</tr>
<tr>
<td>New Books</td>
<td></td>
</tr>
</tbody>
</table>

Procedure:

1. **Notify** your ITC that you want the “Have you read?” feature turned on. *ITC staff will need one day prior notification to set necessary policies/reports.*

2. **Generate** from the Info Desk tab, the “Add Items to Item List” report.
   a. Basic tab - change name of report to “Add Items to NEW list”.
      In description line add ITEM SELECTION TAB - USE DATE CREATED as a reminder.
   b. Information Desk tab:
      Select NEW from drop down menu.
      Select the "Item" radio button.
   c. Item selection tab
      Enter your library.
      Use the Date Created gadget to select the time period you desire.
   d. **Save** report as a template.

**NOTE:** *Before you actually run the Add Items to Item List report, you may wish to run a CAT: Shelflist with the same selection criteria to verify that you will be making the changes that you expect.*
e. **Run** the report. This will update the MARC records for the OPAC. Older titles (if they exist) will be removed and your new ones added.

f. The updated list will appear in CAT the next day.

**NOTE:** You will not be presented with a list of titles in your finished reports. This report only updates the opac.

**HINT:** When the opac has been updated, mark all the new titles Kept. Display your Kept list, sort as desired, and email it (if that option has been turned on) to faculty or students!
Table of Contents
Getting Started in Workflows
Section 3

3.1 Accessing Workflows
3.2 Workflows Screen/Themes
3.3 Wizards & Toolbars
3.4 Set Wizard Properties
3.5 Online Help
3.6 Additional Information Sources
3.7 Keyboard Shortcuts
3.8 Dictionary
3.9 Library Calendar
Getting Started in Workflows

Accessing Workflows

Double click on the Workflows icon on your desktop.

Logging in

1. Connect to Host
   - You will see a large screen similar to this. It should be configured for you. If you cannot access Workflows, contact your ITC (or see your district's specifics in Section 1.1)
   - Click on OK at the bottom of the screen.

2. Enter your User ID and PIN.
Workflows Screen

Sirsi K-12 features wizards that allow you to perform complex library tasks quickly and efficiently. These wizards can be accessed on toolbars. The helper bar, menu bar, and tools such as gadgets, glossaries, tabbed folders, alert windows and hypertext links allow you to move easily through Workflows.

Note: For more detailed information or specific questions, search ONLINE HELP.
WorkFlows Themes

WorkFlows Themes displays a new look that is consistent with today's desktop graphical environment, and provides much faster navigation between Unicorn modules and functions.

You can change your WorkFlows desktop colors by selecting from a set of preset color palettes. To change WorkFlows Themes, from the menu bar Click on Preference, point to Desktop, and Click Desktop Setup. In the Themes box, select a theme (or color palette) from the drop-down list, and Click OK. The first time you may be prompted to restart the workstation to see the new theme windows.

NOTE: Once you are in Themes mode, you can easily change to other themes without having to restart the workstation again. NEVER select Classic!

The following themes are delivered:
1. ** Classic (DO NOT SELECT)
2. Blue
3. Brown
4. Green
5. Pink
6. Purple
7. Primary Red
8. Primary Blue
9. Primary Green
10. Spring
11. Summer
12. Fall
13. Winter

From the Menu Bar:
1. Click Preference
2. Desktop
3. Desktop Setup

On the Themes drop down menu:
4. Select the theme or color you prefer.
5. Click OK

BE SURE TO PUT A CHECK BY MULTIPLE WINDOWS MODE!
Using Multiple Windows

You may have multiple windows open at one time. Opening many of the same windows, at one time, may slow down Workflows response time. A new feature in Symphony has made it easier finding and selecting your open screens.

Active Windows

When you have more than one window open, the Active option will display and you may easily switch between screens.

1. **Click** Window from the top menu.
2. **Move to** Active
3. **Click** the name of the screen you now wish to work with.

✔ The checkmark indicates the active screen on top and ready for work.
Window settings
Top menu, window settings, will allow you to display several open windows in different views. Screenshots of 3 open windows with different settings, opened in this order: 1 - Item Search 2 - Checkout 3 – Check In

Tile:

Cascade:
Resizing the Screens

Most screens in Java can be made larger or smaller by simply clicking and dragging. Watch your mouse as you move it around the screen. When it turns to resize mode (2 points), you can click and drag that section to the size you wish.

Before:

<table>
<thead>
<tr>
<th>Description</th>
<th>Call Number/item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phillips, Charles. - The last history of Aztec &amp; Maya : the history, legend,</td>
<td>972.01 PHI PB - NRHS</td>
</tr>
<tr>
<td>3045060143255 - 1 - NONFICTION - AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>Price: $20.00</td>
<td>item group: NONFICTION</td>
</tr>
<tr>
<td>Shelf location: AVAILABLE</td>
<td>Current location: AVAILABLE</td>
</tr>
<tr>
<td>Material type: BOOK</td>
<td>Funding source: none</td>
</tr>
<tr>
<td>Date created: 4/10/2006</td>
<td>Media desk: none</td>
</tr>
<tr>
<td>Date last charged: NEVER</td>
<td>Previous user ID:</td>
</tr>
<tr>
<td>Last discharged: NEVER</td>
<td>Last activity: NEVER</td>
</tr>
<tr>
<td>Date inventoried: NEVER</td>
<td>Total checkouts:</td>
</tr>
<tr>
<td>Times inventoried: 0</td>
<td>In-house uses:</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

After:

<table>
<thead>
<tr>
<th>Description</th>
<th>Call Number/item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phillips, Charles. - The last history of A</td>
<td>972.01 PHI PB - NRHS</td>
</tr>
<tr>
<td>3045060143255 - 1 - NONFICTION</td>
<td></td>
</tr>
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<td>Price: $20.00</td>
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<tr>
<td>Last discharged: NEVER</td>
<td>Last activity: NEVER</td>
</tr>
<tr>
<td>Date inventoried: NEVER</td>
<td>Total checkouts:</td>
</tr>
<tr>
<td>Times inventoried: 0</td>
<td>In-house uses:</td>
</tr>
</tbody>
</table>

You can use the Show / Hide Search Pane helper to see more of the result screen.
### Sorting Results

Any of the screens that have a results list (Item Search, User Search, Finished Reports) with a header column can be sorted by clicking the various headers. The selected sort option will have a gray arrow in it to indicate ascending or descending.

Click on Title to sort by title.

<table>
<thead>
<tr>
<th>Title</th>
<th>Author</th>
<th>Pub. Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>The apes, the gorilla, chimpanzee, orangutan, a...</td>
<td>Reynolds, Vernon.</td>
<td>1967</td>
</tr>
<tr>
<td>Encyclopedia of events that changed the world: ...</td>
<td>Ingpen, Robert R.</td>
<td>1991</td>
</tr>
<tr>
<td>Exploring the ocean world; a history of oceanography ...</td>
<td>Ickes, C. P. (Clarence P.)</td>
<td>1969</td>
</tr>
<tr>
<td>The grand tactical, Khrushchev’s rise to power</td>
<td>Piskar, Lazar.</td>
<td>1961</td>
</tr>
<tr>
<td>The History of the First World War</td>
<td>Wood, Leonard.</td>
<td>1965</td>
</tr>
<tr>
<td>History of World War I</td>
<td>Taylor, A. J. P. (Alan John Percivale), 1906-</td>
<td>1974</td>
</tr>
<tr>
<td>The Macmillan world history factfinder</td>
<td>McEvedy, Colin.</td>
<td>1985</td>
</tr>
<tr>
<td>The military history of World War II</td>
<td>Dupuy, Trevor Nevitt, 1916-</td>
<td>1962</td>
</tr>
<tr>
<td>Pictorial history of the Jewish people, from Bible ...</td>
<td>Ausubel, Nathan, 1899-</td>
<td>1953</td>
</tr>
<tr>
<td>A pictorial history of the World War II years</td>
<td>Jablonski, Edward.</td>
<td>1977</td>
</tr>
</tbody>
</table>

Click on Author to sort by author

<table>
<thead>
<tr>
<th>Title</th>
<th>Author</th>
<th>Pub. Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>World War II : a photographic history</td>
<td>Year</td>
<td>1956</td>
</tr>
<tr>
<td>Pictorial history of the Jewish people, from Bible tim...</td>
<td>Ausubel, Nathan</td>
<td>1953</td>
</tr>
<tr>
<td>The United States since 1865</td>
<td>Dulles, Foster Rhea</td>
<td>1900-</td>
</tr>
<tr>
<td>Prelude to world power; American diplomatic history ...</td>
<td>Dulles, Foster Rhea</td>
<td>1900-</td>
</tr>
<tr>
<td>The military history of World War II</td>
<td>Dupuy, Trevor Nevitt</td>
<td>1916-</td>
</tr>
<tr>
<td>The war in the air; a pictorial history of World War II</td>
<td>Gurney, Gene.</td>
<td>1962</td>
</tr>
<tr>
<td>Exploring the ocean world; a history of oceanography ...</td>
<td>Ickes, C. P. (Clarence P.)</td>
<td>1969</td>
</tr>
<tr>
<td>Encyclopedia of events that changed the world: ...</td>
<td>Ingpen, Robert R.</td>
<td>1991</td>
</tr>
<tr>
<td>A pictorial history of the World War II years</td>
<td>Jablonski, Edward.</td>
<td>1977</td>
</tr>
</tbody>
</table>

Click on Pub. Year to sort by date of publication.

<table>
<thead>
<tr>
<th>Title</th>
<th>Author</th>
<th>Pub. Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salt; a world history</td>
<td>Kurtansky, Mark.</td>
<td>2002</td>
</tr>
<tr>
<td>World War II : a photographic history</td>
<td>Year</td>
<td>1990</td>
</tr>
<tr>
<td>Encyclopedia of events that changed the world: ...</td>
<td>Ingpen, Robert R.</td>
<td>1991</td>
</tr>
<tr>
<td>The Macmillan world history factfinder</td>
<td>McEvedy, Colin</td>
<td>1985</td>
</tr>
<tr>
<td>The spoils of time; a world history from the dawn of ...</td>
<td>Weigwood, C. V. (Cicely Veronica), 1910-</td>
<td>1985</td>
</tr>
<tr>
<td>A pictorial history of the World War II years</td>
<td>Jablonski, Edward.</td>
<td>1977</td>
</tr>
<tr>
<td>History of World War I</td>
<td>Taylor, A. J. P. (Alan John Percivale), 1906-</td>
<td>1974</td>
</tr>
<tr>
<td>A World History</td>
<td>McNeill, William H.</td>
<td>1971</td>
</tr>
<tr>
<td>Exploring the ocean world; a history of oceanography ...</td>
<td>Ickes, C. P. (Clarence P.)</td>
<td>1969</td>
</tr>
</tbody>
</table>
Wizards

Wizards are similar to menus. They are displayed by subject and reside on a toolbar. Simply click on a wizard to perform the specified function. A user will be denied use of a wizard if they do not have access privileges granted in policies.

Wizards that have an arrow gadget indicate related functions are available. This is called a Wizard Group. Click on the wizard icon to display the wizard group.
Toolbars

Toolbars allow quick access to the wizards that have been preset for the type of privileges granted to the account. The toolbar will display the access profile you have been assigned.

Example: The CIRC2 toolbar allows access to only the listed wizards. If a user logs in and attempts to use a toolbar with wizards who they have not been granted access, they will receive an error message stating they are not authorized.
Set Properties

Understanding Properties

Each wizard has properties which provide screen defaults and various control settings for each wizard. A set of default properties for wizards are provided and stored in a system file on the server. The ITC administrator can customize those properties for the site (recommended for all “generic” properties), or for a group of users. These customizations are saved on the host to a file specified by the library system administrator (system-level properties). However, local properties for the workstation can also be saved to a property.dat file by the staff user.

When a client session is started, the system-level properties file is downloaded to the workstation along with the properties defined for this user's User Access policy. When a wizard is used, the system first loads the system-level properties, but any locally-defined properties take precedence over the system-level properties.

NOTE: Only users with a user access level of administrator or supervisor can change Behavior and Helper properties. Supervisors can access wizard properties on individual workstations, and any changes are saved locally.

Selecting Properties

1. To display properties for a specific wizard:
   - **PC users**, place your mouse over a wizard's icon and right **click** on the mouse.
   - **MAC users**, hold down the **ctrl** button and **click** on the mouse.

2. Select **Properties** to display each wizard's Set Properties window, containing the following folders:
   - Behavior
   - Defaults
   - Helpers.

These folders display the current settings for the wizard and allow you to change these settings. These changes will be displayed the next time the wizard is used.

NOTE: If a folder does not contain any information, the folder will not display. For example, the Checkout wizard does not contain any Defaults properties.
3. Behavior

In the Behavior folder, you can preset selected field values and select which next steps and/or folders will display with a specific wizard or helper. Some wizards will contain an At End of Wizard screen area, in which you can select which next step buttons display at the end of the wizard workflow or select which action the wizard should automatically perform as the last step of the wizard.

**NOTE:** This folder only displays to users at the supervisor and administrator access level. Contact your ITC if you need changes here.

4. Defaults

In the Defaults folder, you can preset field values and select which information will display with a specific wizard or helper.

5. Helpers

In the Helpers folder, you can select which helpers will display with a specific wizard or helper. You can also configure properties for helpers by clicking on the platform under the helper name. (ex: Item Search and Display wizard, select the Helpers tab, Show Search/Display/Browse Options Helper

**CAUTION:** Changes you make to a helper's properties apply globally whenever this helper is used.

**NOTE:** This folder only displays to users at the supervisor and administrator access level.

**Saving Properties**

If you want to save your property changes permanently:

1. **Exit** the workstation.
2. **Select** Yes to save the changes to your local workstation.
3. **Log in** and your changes will be there.

**TIP:** You have the option of displaying the Set Properties screen every time a wizard is selected. This may be helpful for some of the cataloging wizards.

**Display property page:** Wizard Startup Never

**Note:** For more detailed information or specific questions, use HELP wizard.
**Situation:** Students come to the library by class. Librarian wants to quickly checkout by using their names rather than scan a barcode.

1. **Right click** on Check Out on the Common Tasks Toolbar.
2. **Click** on Properties
3. On the Helpers tab, **click** on the User Search button, NOT the checkbox.
4. **Select** Keyword for Type.
5. **Set** Search Index to Homeroom.
6. **Set** Sort by to User Name.
7. **Check** the Start with Search Helper box.

### How to use this setting:

1. In checkout, **click** on User Search Wizard.
2. In the search box, **enter** homeroom number exactly as it appears on the student records.
3. **Select** student from the list.
4. When you are ready for next student, **click** on Check out to new user. Your list will still be there and you can select the next student.

**NOTE:** The search index can be made anything you wish from the menu (alt ID, Name, etc.). However, it will become the default search index in all wizards, not just checkout.
**Situation:** You are going to catalog a large number of items with similar properties (item group, price, funding source, etc.)

1. **Right click** on Add Item Wizard.
2. **Select** Properties.
3. On Default tab, **select** the common properties your items have. The example below shows DVDs purchased with grant money for $19.95 each.

<table>
<thead>
<tr>
<th>Behavior</th>
<th>Defaults</th>
<th>Helpers</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Index:</strong></td>
<td>Title</td>
<td></td>
</tr>
<tr>
<td><strong>Library:</strong></td>
<td>Full access to all libraries</td>
<td></td>
</tr>
</tbody>
</table>

**Editor display options**
- [ ] MARC View
- [x] Display fixed fields
- [ ] Descriptive View
- [ ] Display descriptive labels (for entries)

**Extended Info Display Options**
- [x] Display staff note on item list
- [x] Display public note on item list

**Item required default values**
- **Type:** AUDVISUAL
- [x] Permanent
- **Home location:** AVAILABLE
- [ ] Circulate
- [ ] Shadow item

**Item optional default values**
- **Price:** $19.95
- **Item category 1:** DVD
- **Item category 2:** GRANT
- **Media desk:**

How to use this setting:
1. **Click** on Add Item.
2. **Display** the correct record.
3. The default values you entered will automatically appear on the screen, so you just need to **enter** call number and barcode number.
Online Help

Help in performing any function, is just a click away. Be sure to get acquainted with these features. The online help contains hyperlinks to facilitate moving between topics. The WorkFlows client uses the Java Help technology for presenting and indexing help topics. Four methods of accessing WorkFlows Help topics are available.

1. Context-sensitivity
2. Table of Contents
3. Index
4. Search

1. Context-sensitivity **Use to find a help topic within the wizard workflow.**
   a) *Click* the Help button (book with question mark) on the current toolbar, and context help for the active window will appear.
   b) *Select* “Context” from the Help menu, and context help for the active window will appear.
   c) *Right-click* the mouse over a wizard icon, select Help from the shortcut menu, and the wizard help topic will appear.
2. Table of Contents – **Use to find help topics that relate to a specific module.**
   The Table of Contents folders are arranged as follows:
   - About the Module
   - Module Toolbar – Wizards
   - Wizard Properties
   - Working with the Module
   - Wizard Tabs
   - Wizard Fields
   - FAQs

3. Index – **Use when you know the topic title, subject or keyword.**
   Topics are organized alphabetically, specifically grouping wizard topics with their properties topics, “about” topics, and FAQs.

4. Search – **Use to search questions, phrases, or keywords.**
   Java Help full-text search analyzes your search text and locates specific passages where answers to your queries may be found. It is wise to refine your search with multi-word, natural language queries, rather than one term or keyword.
5. Select Desktop/Setup/Default help topic to set a specific default topic for online Help (such as Circulation).
Additional Information Sources

In addition to the online help, you will find alerts, gadgets, glossaries, and tabs to be helpful sources of information.

Special Information Windows and Alerts

Special Information windows will display any user alerts after a user has been identified. Information about user status are typical library alerts.

![Special Information Window](image)

Gadgets

A gadget icon will appear when you can access information such as date/time ranges and monetary amounts. Click on the gadget icon to display the information.

![Gadget Example](image)

In this example, clicking the gadget by the special due date will display a calendar. You can just click on the calendar for the due date you wish.
Glossaries

Glossaries are indicated by a dashed line under a field of information. Clicking on the line will bring up a box containing more information about the user or item.

Platforms

Platforms are hyperlinks that appear as raised boxes. Click on the box to display additional information/selections.
Tabs

Information about an item, user, or hold is displayed in tabbed folders. Click on the name of the folder to display the information.
**PC Keyboard Shortcuts**

When in the client windows, the following key combinations can be used instead of your mouse.

<table>
<thead>
<tr>
<th>For this task</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Windows menu items</td>
<td>ALT+Underlined character</td>
</tr>
<tr>
<td>Perform various client tasks</td>
<td>ALT+[key]</td>
</tr>
<tr>
<td>Move through wizard tables, lists, and drop-down lists</td>
<td>ARROW Keys</td>
</tr>
<tr>
<td>Insert and delete fields</td>
<td>CTRL+[key]</td>
</tr>
<tr>
<td>Select default button</td>
<td>ENTER</td>
</tr>
<tr>
<td>Access Help</td>
<td>F1</td>
</tr>
<tr>
<td>Move forward thru Tabs</td>
<td>SHIFT+PAGE UP</td>
</tr>
<tr>
<td>Move backward thru Tabs</td>
<td>SHIFT+PAGE DOWN</td>
</tr>
<tr>
<td>Select or clear check boxes and radio buttons</td>
<td>SPACEBAR</td>
</tr>
<tr>
<td>Move forward thru text boxes, check boxes, and radio buttons</td>
<td>TAB</td>
</tr>
<tr>
<td>Move backward thru text boxes, check boxes, and radio buttons</td>
<td>SHIFT+TAB</td>
</tr>
</tbody>
</table>

**ALT+Underlined character**

*Press* ALT with the appropriate underlined character to access basic Windows commands (such as File, Edit, etc.) from the menu bar.

Additionally when using a wizard, *press* ALT with the underlined character in the wizard next step buttons to perform next step functions. In order for this to work properly, you may need to make a modification to the Windows Control Panel/Display selections. Follow these steps.

1. *Click* the Windows Start menu button.
2. Point to *Settings*, then *click* Control Panel.
4. *Click* the Effects tab.
5. On the Effects tab, make certain the Hide Keyboard Navigation Indicators Until I Use the Alt Key option is *not selected*. If it is selected, clear the check box, then click Apply.
6. If you cleared the check box while the client was open, you will need to *restart* the client for this change to take effect.

**ALT+[key]**

ALT in combination with different keys can perform various tasks in the client.

- *Press* ALT+C to cancel an operation.
• **Press** `ALT+F4` to close a wizard window.
• **Press** `ALT+F4` to close Workflows (after all wizards are closed)

**ARROW Keys**

*Use* the UP and DOWN ARROW keys to move through a drop-down list; the UP and DOWN ARROW keys sometimes open this list as well. **Selecting** a letter or starting to type an entry name jumps to that entry in the list. When the list is open, you can also **highlight** a value and press ENTER to select the value.

When you search for an item in the catalog, you can use the UP and DOWN ARROW keys to move the highlight to an entry in the search results list. Pressing ENTER selects that entry.

**CTRL+[key]**

CTRL in combination with different keys can perform various tasks in the client.

• **Press** `CTRL+DELETE` to delete a field.

**ENTER**

*Pressing* ENTER in a client window selects the default action (typically the left-most button).

**Note:** *Pressing ENTER in a drop-down list selects the highlighted value.*

**F1**

**Press** F1 to access the Help. F1 is the standard for accessing help files.

**SHIFT+PAGE UP or PAGE DOWN**

Use the SHIFT and PAGE UP (PAGE DOWN) keys to tab between text boxes.

• **Press** `SHIFT+PAGE UP` to tab forward.
• **Press** `SHIFT+PAGE DOWN` to tab backward.

**SPACEBAR**

**Press** the SPACEBAR to select or clear a check box or radio button.

**TAB and SHIFT+TAB**

The TAB and SHIFT+TAB with different keys can perform various tasks in the client.
• **Press** TAB to move between writable fields, check boxes, and buttons. A button appears as active when a dotted outline appears around the button text.
• **Press** SHIFT+TAB to move backward between active, input text boxes, check boxes, and buttons.
• **TAB** to a check box or radio button, then **press** SPACE to select the check box or radio button.
• **TAB** to a gadget, then **press** ENTER to open the gadget.

Notes

• For information about how to create keyboard shortcuts for wizards, refer to the Toolbar Management: Modifying a Toolbar topic in online help.
• For a listing of default wizard toolbar keyboard shortcuts, see Toolbar Wizard Keyboard Shortcuts in online Help.
## Dictionary of Sirsi K-12 Terminology

<table>
<thead>
<tr>
<th>Sirsi K-12 Term</th>
<th>Sirsi K-12 Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alert Window</td>
<td>The <strong>Alert Window</strong> displays user alerts such as delinquencies, bills, and messages.</td>
</tr>
<tr>
<td>Auto-generated barcodes</td>
<td><strong>Auto-generated barcodes property</strong> can be selected or cleared to allow IDs to be automatically generated when adding new items or new users. Barcodes are automatically generated, using an autoid file with predetermined starting numbers. When the system is auto-generating an ID using Barcode Validation policies and finds a duplicate ID, the system will try to generate a valid ID again before creating the item or user record with an auto-generated ID.</td>
</tr>
<tr>
<td>Barcode shortcut</td>
<td>Using the <strong>barcode shortcut</strong> feature, you may enter only the significant digits of the barcode to retrieve the user or item record. You may also include an x wild card character for the check digit to auto-calculate the check digit on-the-fly. For example, barcode 32605000024312 could be entered as just 5002431x or 50024312</td>
</tr>
</tbody>
</table>
| Barcode validation | The **Barcode Validation** feature prevents the use of user or item barcodes that do not comply with the INFOhio formats.  
1. The first digit of the barcode number must be a 2 (user/patron) or 3 (item)  
2. Positions 2 through 5 of the barcode number is the institution code assigned to the school district  
3. Position 14 is appropriate calculated check-digit (mod 10 algorithm)  
4. The barcode is 14 digits long. |
<p>| Barred | <strong>Barred</strong> users cannot checkout items. A user cannot be automatically barred or unbarked by the server. This status must be set or removed by a workstation operator with special privileges. An override code is required to check out items to a <strong>barred</strong> user. |
| Blocked | Users are <strong>blocked</strong> when their unpaid bills and accruing fines reach a specified amount (policy) or they have overdue items beyond limit allowed by policy. An override code is required to check out items to a <strong>blocked</strong> user. |
| Client | <strong>Client/server</strong> means that there is an intelligent workstation <strong>client</strong> accessing a central database through software that resides on a server. |
| Delinquent | Users become <strong>delinquent</strong> when they have unpaid bills or overdue items, but have not yet reached the limits set by policy for barring. <strong>Delinquent</strong> users have all privileges, but the system will warn staff of the user’s status. |
| Gadgets | <strong>Gadgets</strong> are buttons used to select information such as date/time ranges and monetary amounts. |
| Glossaries | <strong>Glossaries</strong> are dashed lines that contain additional information about users and items. |
| Helper Bar | The <strong>helper bar</strong> is located below the active window’s title bar. Helpers on the left side of the bar make it easier to access information needed by the current wizard. |
| Hyperlinks | <strong>Hyperlinks</strong> are underlined terms that represent a link to a related step. |
| Instance | An <strong>instance</strong> is the specific district. |
| ITC Staff | Instructional Technology Center staff. |
| Item Group | The <strong>Item Group</strong> uniquely identifies an item type of an object. INFOhio has a standard list of <strong>Item Groups</strong>. |
| Item ID | The <strong>item ID</strong> is the barcode number for a specified item. |
| Library | The <strong>Library</strong> is a specific school library in an instance. The library has been assigned a 4-5 letter building code. |
| Location | Each item has a home <strong>Location</strong> and a current <strong>Location</strong>. The item is at its home <strong>Location</strong> whenever it is not checked out (usually <strong>AVAILABLE</strong>). The current <strong>Location</strong> always reflects where the item is now, checked out or not. |
| Material Type | <strong>Material Type</strong> denotes a copy’s special characteristics for collection management and statistical analysis. <strong>Material Type</strong> determines display in the OPAC. |
| Override | An <strong>Override</strong> password is needed to allow entry into protected information or allow the staff to override policies for circulation. Must be obtained through system administrator. |
| Policies | <strong>Policies</strong> are tools used to configure Sirsi K-12 Library Management System to reflect a library’s <strong>policies</strong> governing access to resources. |</p>
<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Radio Button</td>
<td>A <em>Radio Button</em> is a circle that must be selected to control the type of search: keyword, browse, exact, current, etc.</td>
</tr>
<tr>
<td>Search Index</td>
<td><em>Search Index</em> is a list of possible search fields. The values that display in the list vary depending on the wizard or helper.</td>
</tr>
<tr>
<td>Set ID</td>
<td><em>Set ID</em> identifies items placed in a Circulation Set to circulate together.</td>
</tr>
<tr>
<td>Shadow</td>
<td>The <em>shadow</em> catalog allows the library to retain full catalog records searchable only by library staff. The library may want to <em>shadow</em> records which cannot be used by patrons, such as lost or missing volumes/copies or titles still being cataloged by technical services.</td>
</tr>
<tr>
<td>Shortcuts</td>
<td><em>Keyboard Shortcuts</em> are two keys struck at the same time to eliminate the need to use the mouse.</td>
</tr>
<tr>
<td>SirsiDynix</td>
<td><em>SirsiDynix</em> is the company that owns the library software.</td>
</tr>
<tr>
<td>Sirsi Workflows</td>
<td>SirsiDynix library software</td>
</tr>
<tr>
<td>SmartPort</td>
<td>Software that acts as gateway to various cataloging sites such as LC and the Union Catalog. <em>SmartPort</em> provides the additional feature of immediately capturing records directly into your catalog.</td>
</tr>
<tr>
<td>Tabs</td>
<td><em>Tabs</em> are categorized folders containing related information. Arrow <em>tabs</em> display when more than five folders are available.</td>
</tr>
<tr>
<td>Template</td>
<td><em>Template</em> (reports) is a list of reports based on generic delivered reports that were modified and/or saved as <em>templates</em> by members of the library staff.</td>
</tr>
<tr>
<td>Title</td>
<td>The first level of the Bibliographic information in Sirsi is the <em>Title</em>. The <em>Title</em> is the Bib/MARC Record.</td>
</tr>
<tr>
<td>Toolbar</td>
<td>The <em>toolbars</em> contain the wizards that the user has access to through defined User Access policies.</td>
</tr>
<tr>
<td>User</td>
<td>Correct term for students/patrons. The patron is the <em>User</em>.</td>
</tr>
<tr>
<td>User ID</td>
<td><em>User ID</em> refers to the patron barcode number which uniquely identifies a User.</td>
</tr>
<tr>
<td>Call Number</td>
<td>The second level of the Bib information in Sirsi is the <em>Call Number</em> level. In a district system, each library must have separate call numbers for the titles in its collection. The prefix used in the Call Number tells the patron where the item can be found in the library.</td>
</tr>
<tr>
<td><strong>Wizard</strong></td>
<td>A <strong>Wizard</strong> is an interactive utility that leads a user through all the steps required to complete a complex task. Toolbars are made up of various <strong>Wizards</strong> – determined by staff’s access policy.</td>
</tr>
<tr>
<td>-------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Wizard Group</strong></td>
<td>A <strong>Wizard Group</strong> opens a bar of wizards necessary to perform a task.</td>
</tr>
<tr>
<td><strong>Workflows</strong></td>
<td><strong>Workflows</strong> is a powerful, yet easy-to-use interface to the SirsiDynix Library Management System, used by library staff.</td>
</tr>
<tr>
<td><strong>Workform</strong></td>
<td>A <strong>Workform</strong> is a template used to enter cataloging information.</td>
</tr>
</tbody>
</table>


Library Calendar

The Library Calendar wizard can be used by library staff to display and modify the closed dates for their individual library. Authorized staff members will only have access to the calendar for their library. The wizard displays the calendar for the library linked to the user's login.

To modify your library's calendar, do the following.

1. **Click** on Library Calendar wizard.

   The current calendar settings for your library appear.

   ![Library Calendar Wizard](image)

   Lima Senior High School
   

   ![Closed Dates](image)

   2. In the **Closed Dates** box, **click** the gadget to select dates the library is closed.

   ![Gadget: Closed Dates](image)

   3. **Select** Add

   ![Add Button](image)
4. Newly added dates will display in list.

<table>
<thead>
<tr>
<th>Closed from</th>
<th>Until</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/16/2006</td>
<td></td>
</tr>
<tr>
<td>02/20/2006</td>
<td></td>
</tr>
<tr>
<td>03/31/2006</td>
<td></td>
</tr>
<tr>
<td>04/14/2006</td>
<td>04/21/2006</td>
</tr>
<tr>
<td>05/29/2006</td>
<td></td>
</tr>
<tr>
<td>06/07/2006</td>
<td>06/12/2006</td>
</tr>
<tr>
<td>07/04/2006</td>
<td></td>
</tr>
</tbody>
</table>

**NOTE:**
- 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.
- Up to 64 closed dates may be selected.
- Ranges of dates, such as December 24-25, may be used as one closed date.

5. Under Closed Days, **DO NOT MAKE ANY CHANGES**.

6. **Click** Save. Library calendar changes made in this wizard will update the corresponding Library policy.

   ![Save Cancel Button]

**NOTE:** If you need this policy to take effect immediately, contact your ITC. The policy will take effect after the database is recycled.

7. **DO NOT REMOVE** any closed dates, unless directed to do so. If deemed necessary, contact your ITC Staff.

**NOTE:** For other options available for checking items in without charging a fine, see Sec. 6.8, Fine Free Check In or Sec. 7.1 – Checkin Bookdrop.
Barcode Options in Symphony

Dumb Barcodes

Currently everyone can generate dumb barcodes for both patrons and items using the LBL: Dumb Label report on the INFOhio tab. These are used for adding new items or new patrons to your database.

Barcode Shortcut

Symphony lets you shortcut the barcodes when you need to type them. Instead of typing all 14 digits, you can type the significant digits with an x for the check digit. When a valid number is entered and the X is added, the complete 14 digit number will be filled in the entry box.

Remember all INFOhio barcodes are 14 digits:

<table>
<thead>
<tr>
<th>Type</th>
<th>Inst. Code</th>
<th>Unique number</th>
<th>check digit</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2 3 4 5</td>
<td>6 7 8 9 10 11 12 13</td>
<td>14</td>
</tr>
</tbody>
</table>

32612000100069 could be typed as 10006x

Advantages:

Patrons:
- You could check out to a student if he tells you his student ID number by typing those 6 digits with an x at the end.
- You can display a student by using the barcode shortcut.
- You can use the shortcut in User Registration.

Items:
- When you are cataloging without a scanner, you can type just the significant digits with an x instead of all 14 digits to enter the new ID number. These digits can be gotten from a dumb barcode, or you can keep track of barcode numbers by hand and then print smart barcodes.
- You can look up an item by typing the significant digits with an X.

Wizards it works with:
- Any barcode entry screen. DOES NOT WORK in search screen.

Auto Generated Barcodes (Auto-gen)

Symphony gives you the option of letting the system generate patron and item barcode numbers. You need to give your ITC a starting number so they can set this up for you. (This is a separate range from dumb barcodes.) You also need to set properties in the various wizards. Once your system is configured properly, barcode numbers will “magically” appear on various screens.

Advantages:

Patrons:
- When adding new patrons, the system will track the next available barcode number and assign it when you enter a new patron. This is a good thing for adding faculty or schools that do not use patron updating.
Items:
- When adding new items, the item ID automatically appears on the screen when you click Add Item.
- Beginning numbers for auto gen can be set by building or for the district.

Disadvantages
Patrons:
- Schools using Patron Updating need to use care that they don’t use this for students. Their ID numbers must be generated from their student ID number.

Items:
- You will need to print smart barcodes for your items after entering them into your database.
- This does not work when you change an item’s ID. You still need to use dumb barcodes for that.
- If you chose to have a different range of auto gen barcodes for each building, catalogers will need to be very careful. The barcodes are generated based on the way the computer was logged in. If you login as XXHS and want to catalog an item for XXMS, the auto gen barcode will be in the XXHS range.

Our Recommendation: Select just one range for auto gen barcodes for the district. If using them, you’ll need to print smart barcodes for the items anyway, and they will display the school’s name.

Things to consider:
- You can try auto-gen and if you don’t like it, simply change your properties to switch to the barcode shortcut instead.
- How do you check out to students? Which method would be most advantageous to you?
- How do you catalog? Which method would be most advantageous to you?

Setting the Properties for Auto-gen

Properties for adding users are set in User Registration.

Properties for adding items are set in Call Number / Item Maintenance.

NOTE: If auto gen is turned on, you will not be able to use the barcode shortcut when adding items or patrons. However, you will still be able to use it for other wizards.
# Table of Contents

**User Maintenance**

**Section 4**

4.01 User Search Helper/Properties

4.1 Display User

4.2 User Registration

4.3 Copy User

4.4 Modify User

4.5 Remove User

4.6 Suspend User

4.7 Unsuspend User

Helper Buttons which display on User Maintenance windows.

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>![User Search Icon]</td>
<td>User Search</td>
<td>![Modify User Icon]</td>
</tr>
<tr>
<td>![Display User Icon]</td>
<td>Display User</td>
<td>![Copy User Icon]</td>
</tr>
<tr>
<td>![Pay Bills Icon]</td>
<td>Pay Bills</td>
<td>![Item Search Icon]</td>
</tr>
<tr>
<td>![Print User Helper Icon]</td>
<td>Print User Helper</td>
<td>![Credit Account Icon]</td>
</tr>
<tr>
<td>![Transaction History Icon]</td>
<td>Credit Account Transaction History</td>
<td></td>
</tr>
</tbody>
</table>
Display User

The Display User wizard displays user information after guiding you through the process of selecting which user information to display.

1. **Click** on User Maintenance Wizard Group
2. **Click** on Display User Wizard
3. **Locate** the appropriate User.

**NOTE:** Method of User search will be pre-determined by the property setting on the Workstation (see Sec. 4.01).

a. **Scan** in or type the significant digits of the user ID.

   OR

b. Using the User Search Helper, **select** User (options are determined by property settings - see Sec. 4.01 for specific details in setting the User Search Helper properties).

4. If you have previously viewed a user record, the option of “Current” will display.
5. If you identify the user by partial name a list may display.

6. When the correct user is located,
   - **click** on the user name
   - **click** on Display this User.

7. **Click** on the tabs or glossaries to access specific user information. Modifications cannot be made from this wizard.
   a. Addresses
   b. Extended info
   c. Bills
   d. Checkouts
   e. Holds
   f. Suspensions
Printing User Information

8. **Print User** information by selecting the **PRINT USER** helper. This will allow for printing of user information from inside the wizard. The helper allows you to select to print All user information, or select from the following options.

   a. **Summary** — Prints user information from the Summary tab of the user record.
   
   b. **Addresses** — Prints all user address information.
   
   c. **Extended Information** — Prints all user extended information.
   
   d. **List of Checkouts** — By default, prints all Active checkouts. To change, select from the list options Active, All, Claims Returned, Inactive, Overdue, Recalls, Renewals.
   
   e. **List of Bills** — By default, prints all Unpaid bills. To change, select from the list options Unpaid, Paid, All.
   
   f. **List of Holds** — By default, prints all Holds. To change, select from the list options All, Available, Recalled, Reserve.
   
   g. **List of suspensions** — by default prints all active suspensions. To change, select from active or All suspensions.
   
   h. **List of routings** - Not used.

**NOTE:** You can also use the Print function from the Printer icon in the Common Tasks toolbar; but if you do, you can only print the whole record. There is no option to print a specific screen.

**HINT:** Before printing, look at the print preview. If information is wrapping, try changing the page setup to Landscape.

9. **Select** from options.

**Note:** For more detailed information or specific questions, use HELP wizard.
User Search Helper / Properties

The User Search Helper is used to locate a user record. Various search options are available. You can perform a keyword or browse search. If performing a keyword search, search options may include name, phone, email, user ID, Alt ID, etc. If performing a browse search, you can only search on user name.

**Caution:** Changes you make to this helper’s properties apply globally whenever this helper is used.

1. **Right-click** on the Display User wizard.
2. **Select** Properties.
3. **Click** the Helpers tab.
4. **Click** the User Search helper button.
5. Under **Type**, **select** the type of search you want to perform. You have these options:
   - **Keyword** – Locates and displays user records that contain the terms you entered. Boolean operators, field qualifiers, and other search strategies can be used to narrow or expand your search. The search indexes that display are wizard specific.
   - **Browse** – Produces a list in the alphabetic vicinity of the term you entered. For example, a search on Jones J might return all users with a last name of Jones and whose first name begins with J.
6. If you wish a wizard to start with the search helper, **put a check in Start with search helper option**.
7. **Keyword search properties**:
   - **Select** the search option you want from the **Index** list. The search options that display in the Index list are defined in your library’s policies.
   - In the **Library** list, **select** the library to qualify your search.
   - **Sort by** options are also available.
8. **Browse search properties**:
   - In the **Search For** box, **type** the text you want to use for the search.
   - In the **Library** list, **select** the library to qualify your search (if applicable).
Using the User Helper lookup to search for a user

1. If performing a **Keyword** search:

   - In the **Search For** box, **type** the text you want to use for the search.
   - **Select** the search option you want in the **Index** list. The search options that display in the Index list are defined in your library’s policies. For example:
     - **Name** – Displays the user’s name. Perform a partial name search for users by using a dollar sign ($) as the truncation symbol. Include as many characters as possible before the truncation symbol so the resulting list is meaningful and concise. For example, searching for **smith, jo$** produces a more concise hit list than searching for **smith$** or **smith, j$**.
     - **User ID** – Displays the user ID. The User ID field is limited to a maximum of 20 alphanumeric characters.
     - **Alt ID** – Displays the Alt ID (alternative ID) such as student ID number. The Alt ID field is limited to a maximum of 20 alphanumeric characters.
     - **Homeroom** – Displays a list of users in the same homeroom.
   - In the **Library** list, **select** a specific library (or ALL_LIBS) to qualify your search.
   - If you want to use multiple search options, do one of the following:
     - **Click AND** to search for user records using the AND operand. For example, a user record is considered a match if both the specified name and homeroom are found in the user record.
     - **Click OR** to search for user records using the OR operand. For example, a user record is considered a match if either the specified name or phone number is found in the user record.

2. If performing a **Browse** search:

   - In the **Search For** box, **type** the text you want to use for the search.
   - In the **Library** list, **select** the library to qualify your search (if applicable). If the Library field contains a specific library name, only user records for that particular library are searched. If the Library field contains the Full access to all libraries option, the user records of all libraries are displayed.

3. **Click** Search.

4. If a list of users displays, **select** a user, and then continue the current process.

**NOTE**: Changes you make to this helper’s properties apply globally whenever this helper is used.

**Note**: For more detailed information or specific questions, use HELP wizard.
User Registration

The User Registration wizard guides you through the process of registering a new user for your library.

**NOTE:** Automatic Patron Update will keep your student records updated each night. New students will be automatically added but will not appear until the following day after the update runs. If you need to create faculty or a new student follow these steps, using dummy patron barcodes to assign the Patron ID #.

1. **Click** on User Maintenance Wizard Group
2. **Click** on User Registration

   If not using Auto_GENERATED ID, the User Registration screen displays.

   **NOTE:** If the wizard properties are set to not auto-generate a user ID, you can still auto-generate an ID by typing AUTO in the User ID box during registration.

3. **Select** from the drop down menu the correct profile name. The user profile is based on your library’s User Profile policies.

4. **Scan or Type** in the new user barcode number.

   By default, the Duplicate Checking option is enabled to check by User Name and Student ID. If a duplicate is found, the Duplicate User(s) found during Registration screen displays.

   **If using Auto-Generated ID,** the next available number will be added and the information screen will open ready to add your information.

   **NOTE:** Required fields appear highlighted.

   Use the folder tabs to add information about a user and his or her access.

   The Basic Tab will be open.

5. **Type** the faculty/student name as formatted.

6. **Preferred name** – may be used if available. To have the preferred name display instead of the First Name field, **Click** the check box for User preferred name. Enter other fields as needed.

7. **Select** your library code, if not displayed, from the drop down menu.

8. **Select** the profile, if not previously selected, from the drop down menu.
9. The Privilege Tab should be left as system generated.

10. **Select** the Demographic Tab.

    You may enter the Grade (when entering FACULTY* users, selection FACULTY as the grade), Gender, Birth date and Department (Teacher).

    ![](image)

**IMPORTANT NOTE:** Do not change the drop down selections on the labels for the entries in Addresses and Extended Info. These are preset to work with the automatic patron update.

You can add additional information, such as notes and comments, on the Extended Information folder and the Addresses folder. Use the Before and After helper buttons to add entry fields before or after the field in which your cursor is positioned. Use the Delete helper button to delete an entry field.

11. **Select** the Addresses Tab

12. **Enter** the address information if applicable.

    You may enter a second address if applicable. This is not updated by the system.

    Address 3 - this information has been added to allow for additional information you may wish to enter. This will not be replaced by nightly update.
13. **Select** the Extended Info tab to add a comment or note.

14. To remove an entry in a comment or note, you must **select** the Delete Row helper.

**NOTE:** The extended information will display on the user screen when you click on the Notes glossary. This will not be changed by the patron update.

15. When all information is completed, **click** the Check Duplicate User button.

**NOTE:** Check Duplicate may be turned off in properties.

16. If there are no duplicate users, a message will appear stating “No duplicate users found”. **Click** OK. The Register User button will turn black and then you’ll be able to **click** it to complete the user’s registration.

**Note:** For more detailed information or specific questions, use HELP wizard.
Copy User

The Copy User wizard guides you through the process of creating a new user record by copying existing user information.

1. **Click** on User Maintenance Wizard Group.
2. **Click** Copy User wizard.
3. **Locate** the appropriate user record.

**If not using Auto Generated ID, Copy User:** Clone/Copy User screen displays

**NOTE:** If the wizard properties are set to not auto-generate a user ID, you can still auto-generate an ID by typing AUTO in the User ID box during registration.

4. In the Clone/Copy User step, scan a new barcode number in the New ID field or type Auto to generate an ID.

**If using Auto-Generated ID,** the next available number will be added and the information screen will open ready to add your information.

**Copy User: Entering Info for screen displays.**

5. Use Tabs to enter information about a user and his or her profile, name, demographics, and addresses. Add additional information, notes and comments, on the Extended Information tab.

6. **Select** Register User to add new user when finished entering information.

7. **Select** from options:

   - Register User
   - Modify
   - Clone/Copy This User to Another
   - Make More Changes
   - Close

**Note:** For more detailed information or specific questions, use HELP wizard.
Modify User

The Modify User wizard guides you through the process of updating or correcting a user record.

1. **Click** on User Maintenance Wizard Group
2. **Click** on Modify User Wizard

Modify User screen displays.

3. **Select** a user and Click the Modify User button.

Modify User screen displays.

4. User information displays based on the selected tab folder options. **Make changes** to the information in the tab folders.

5. **Click** Modify User when you have finished modifying the user information.

![Modify User screen](image)

6. **Select** from options.

![Complete screen](image)

**Note:** For more detailed information or specific questions, use HELP wizard.
Remove User

The Remove User wizard guides you through the process of removing a user record from the catalog.

1. **Click** on User Maintenance Wizard Group.
2. **Click** on Remove User Wizard.
3. **Locate** the appropriate user.

Remove User: Removing User screen displays.

4. **Review** the user information.
   - If this is the correct user, **click** the Remove User button; if not, **click** Remove Another User button and search again.

   (Name of User) Removed screen displays.

**NOTE**: If the user has open transactions, Remove User: Error alert displays. You will not be allowed to remove the user.

**Note**: For more detailed information or specific questions, use HELP wizard.
Suspend User
(Suspending a User's Loan Privileges)

Some libraries prefer to suspend a user's loan privileges when overdue materials are returned rather than assess overdue fines. The library can define policies to automatically suspend loan privileges for a specified period of time when materials are returned. In addition, staff members may use the Suspend User wizard to manually suspend a user's loan privileges for a specified number of days for reasons not associated with borrowed materials.

**NOTE:** These instructions are for MANUALLY suspending a user.

1. **Click** on User Maintenance Wizard Group
2. **Click** on Suspend User.

Suspend User screen displays.

3. **Locate** the appropriate user.

4. **Select** the Reason for suspension from the drop down menu.

5. **Enter** the date for end of suspension in the Suspend by Date Selection OR number of days to suspend the user's loan privileges in the Suspend for Number of Days box. (does not consider closed days/dates) (depends on property setting for this wizard).

6. If the suspension reason is associated with an item, **Type or scan** the item ID in the Item ID box.

7. **Click** the Suspend User button.

8. The information for the suspension will display in the List of Suspensions section. The Next allowed loan date will display in the User Information section.

**Note:** For more detailed information or specific questions, use HELP wizard.
Unsuspend User
(Modifying Suspend User function)

Using the Unsuspend User Wizard, you can cancel or forgive individual suspended users.

1. **Click** on User Maintenance Wizard Group

2. **Click** on Unsuspend User.

   Unsuspend User screen displays.

3. **Locate** the appropriate user.

4. **Select** the Reason for the unsuspension from the drop down menu.

5. **Enter** the the Date to unsuspend the user’s loan privileges or the number of days to unsuspend (depends on property setting). **Do not edit** the Suspension key field.

6. **Click** the Unsuspend User button.

   The Display User screen will show the suspension/unsuspension record entries under the Suspension tab.

**NOTE:** For more detailed information or specific questions, use HELP wizard.
The Item Search and Display wizard is used to identify a specific title in your library and display information at the title, call number, and item level. At the item level, other types of information related to the item’s circulation and holds are also available.

1. **Click** on Common Tasks Wizard Group.
2. **Click** on Item Search Wizard.

*Item Search* screen displays.

3. In the **Search For** box, **enter** your search expression.

4. **Select** the type of search you want to perform. (see *Search Strategies*)
   a. Keyword – locates and displays records that contain the terms you entered.
   b. Browse - produces a list in the alphabetic vicinity of the term you entered, which may then be browsed forward or backward.
   c. Exact - displays record(s) of the search index you used or a browse list if no exact match.
   d. Current Title - displays the record that was most recently displayed, modified, or added (will not display if first search).

5. In the **Index** list, **select** the search index you want. The search indexes that display are wizard specific.
   a. Author - Author Lookup
   b. Call Number
   c. Curr – Curriculum info (658 tag)
   d. General – ISBN, all fields
   e. Item ID – Barcode Number
   f. Periodical Title- Periodical Title Lookup
   g. Series- Series Title Lookup
   h. Set ID – Circulation Set Lookup (use “3”)
   i. Subject – Subject Lookup
   j. Title - Title Lookup
   k. Title Control # - (oisl) OCLC, ISBN, ISSN, LCCN

6. In the **Library** list, **select** a library to qualify your search. If the Library field contains a specific library name, only item records for that particular library are searched. If the Library field contains the value Full access to all libraries, the item records of all libraries are displayed.

7. **Click** Search.
8. If your search finds results, a list of matching records displays in the hit list area. Select the record you want to display. If the Viewer is turned on, the selected title will display in the lower portion of the window with two tabs, Description and Call Number/Item.

9. To display complete information about the item, including tabs that display detailed bibliographic description information and information about circulation data, click Detailed Display. Several tabs may display, depending on the configuration of the Item Search wizard.
   a. Control Tab – Information used primarily to administer the catalog and maintain the catalog, authority metadata, and review data files.
   b. Bibliographic Tab - Information common to all items associated with the title, and is used primarily to bibliographically describe the item or items.
   c. Call Number/Item Tab – Call number information, and all items associated with the title. The information that displays is specific to a single call number and/or item of the title. The following item information will be displayed:
      • Call Number Information – Call Number, Class Scheme, Call Library, Shadow Call Number
      • Item Information – Item ID, Copy Number, Type, Item Library, Shelf location, Current Status, Material Type, Funding Source, Media Desk, Number of Pieces, Total Checkouts, Price, Permanent, Circulate, Shadow Item
      • Item History – Date Created, Date Due, Date Last Charged and Discharged, Inventory Information, Previous User ID, Last Activity Date, Number of In-House Uses
      • Circ Info – Total Bills, Comments, Checkouts, and Holds
      • Bills – Unpaid Bills with User ID and Name, Amount Owed and Reason
      • Checkouts – User ID and Name, Status, Date Due
      • Holds – User ID and Name, Hold Level, Hold Status
10. In the result list, if there is a NOTE on the item record, you will see a small icon next to the item id:

<table>
<thead>
<tr>
<th>Description</th>
<th>Call Number/item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Harry Potter and the chamber of secrets - Rowling, J. K.</td>
<td>FIC ROW - DLFN</td>
</tr>
<tr>
<td>Price: $19.95</td>
<td>Item type: FICTION</td>
</tr>
<tr>
<td>Shelf location: AVAILABLE</td>
<td>Current status: AVAILABLE</td>
</tr>
<tr>
<td>Material type: BOOK</td>
<td>Funding source: BIRTHDAY</td>
</tr>
<tr>
<td>Date created: 6/25/2008</td>
<td>Media desk: none</td>
</tr>
<tr>
<td>Date last charged: Never</td>
<td>Previous user ID: none</td>
</tr>
<tr>
<td>Date discharged: Never</td>
<td>Last activity: Never</td>
</tr>
<tr>
<td>Date inventoried: Never</td>
<td>Total checkouts: 0</td>
</tr>
<tr>
<td>Times inventoried: 0</td>
<td>In-house use: 0</td>
</tr>
</tbody>
</table>

Extended Information

<table>
<thead>
<tr>
<th>Tag</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>PUBLIC</td>
<td>Donated by Steve Cooper</td>
</tr>
</tbody>
</table>

11. You can print item information by selecting the Print command from the File menu, or by clicking the Print Wizard, if present, on the toolbar.

12. To perform another title search, select from options:

   Return to Search  Close

Note: For more detailed information or specific questions, use HELP wizard.
Check Item Status

The Check Item Status wizard displays the current status of an item. This wizard is especially useful if you find an item and want to know where it should be shelved, or if it should be put in transit.

1. **Click** on Common Tasks Wizard Group.
2. **Click** on Check Item Status Wizard.

   *Check Item Status* screen displays.

3. **Scan or Type** the Item ID or use the Item Lookup Helper.

   **TIP:** The record that was most recently displayed, modified, or added will display as "Current".

4. If item is checked out, patron information will display. If item is AVAILABLE, **click** on title bar to select item glossary to see ID of last user that checked out this item.

   **Check Item Status:** Current Status of Item (Item ID Number) screen displays.

Note: For more detailed information or specific questions, use HELP wizard.
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Circulation
Section 6

6.1 Circulation Helpers
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6.9 Fine Free Checkin

Helper Buttons which display on circulation windows.

| User Search | Renew Privilege | Add Brief Title |
| Register New User | Item Search | Confirm Address |
| User Lost Card | Check Item Status | Special Due Date |
| Display User | Change Item ID | Select Another Library |
| Copy User | Limit List by Due Date | Print User |
| Modify User | Pay Bills |

Print Screen Information.
- Click File.
- Click Print Screen
Circulation helpers

Circulation Helpers will appear on appropriate screens as you perform circulation functions. Only helpers that function from a specific screen will display. To set the properties for a helper, see (3.4 Getting Started in Workflows).

1. User Search

The following methods are available to identify a user. **Select** one.

- **Keyword** - Locates and displays user records that contain the terms you entered. Boolean operators, field qualifiers, and other search strategies can be used to narrow or expand your search. The search indexes that display are wizard specific.
- **Browse** - Produces a list in the alphabetic vicinity of the term you entered. For example, a search on Jones J might return all users with a last name of Jones and whose first name begins with J.
- **After choosing the method, select** the Lookup field and enter the users name or ID.
- **If a list of users displays, select** a user, then continue the process.

2. Register New User

Using this helper, you can register a new user by selecting a profile name and entering other user information. New users often need to be registered during the checkout process.

Once the user is registered, you can check out materials to the new user, review the user information, or make additional changes to the new user record.

3. User Lost Card

Using this helper, you can replace a user's barcode by identifying the user, then entering a new user ID. As the user's library card and record is updated with a new barcode, the server creates a new user record and changes the user profile of the old user record to LOSTCARD.

- **Search** for the user who lost the card.
- **Select** the Assign New Card button to issue a new card, or **select** Cancel to search for another user record.
- **Scan** the new user ID on the new card, or **type** the new ID in the New User ID field. You will see a message confirming that the new card has been issued, and the old user ID has been deactivated.

When you return to the Checkout wizard or Renew User Checkouts wizard, the new user ID is entered automatically.

Set the properties of the User Lost Card helper to use default user search values.
4 Display User

Using this helper button, you can display user information by selecting from the following folder tabs.

- Summary
- Addresses
- Extended Info
- Bills
- Checkouts
- Suspension

5. Copy User

The Copy User helper is used to create a new user record by copying existing user information.

- Click the Copy User helper.
- Search for the user record.
- If a list of users displays, select a user.
- Click Clone/Copy User.

6. Modify User

The Modify User helper is used to change an existing user record.

- Click the Modify User helper.
- Click each tab, as needed, to make changes to the existing user record.

7. Renew Privilege

- This helper displays when the user’s privilege is set to expire within 30 days. If you click Extend Privilege, the user’s privilege expiration date is extended based on the associated User Profile policy.

8. Item Search

You can display item information with the Item Lookup step. The Item Lookup step allows you to perform a Keyword lookup, Browse lookup, or Exact lookup. If item information was recently modified, you can do a Current lookup.

- If a list of items displays, select an item, then continue the process.
Item information may need to be displayed in the following circumstances.

- Checking out an item
- Checking in an item
- Renewing an item
- Billing a user
- Making item holds available
- Inventorying an item
- Marking an item as used
- Checking in a bookdrop item
- Checking an item's status
- Receiving items from transit

FYI: Sort By

The Search or Browse lookup results will be sorted by the selected criteria. The following sort options are available.

- Author sorts by the first occurring author field in the record. Titles that do not include an author display first in the list. Main entry (1xx) and added entry (7xx) authors are combined in the sort.
- Title sorts by the title statement (245) entry.
- Subject sorts by the first occurring subject field in the record. All subject heading types, including topics, names, titles, and geographic headings (6xx) are combined in the sort.
- Pub Year sorts with the earliest published titles first.
- Reverse Pub Year sorts with the most recently published titles first.

9. Check Item Status

The Check Item Status helper is used to display information about the current status of an item, where the item is shelved, or whether it should be put in transit.

- Click the Check Item Status helper.
- Scan the item’s ID in the Item ID box. The Current Status of Item window displays information about the item, proposed action, and current location of the item (if needed).
- Click OK to close the helper and return to the wizard to continue checking the status of other items.
10. Change Item I.D.  

The Change Item I.D. helper guides you through the process of replacing a missing, damaged, or temporary barcode while you are using a wizard.

- **Scan** the item’s barcode, or enter an item's call number. Select Current to accept the most recently displayed or modified item.
- **Select** a library from the Library verify list to qualify the lookup.
- If a list displays, **select** one on the items and **choose** the Change Item ID button.
- You can also **choose** the Cancel button to display another user.
- If you enter a call number and it has more than one item, **select** one of the listed items and **click** the Change Item ID button.
- In the Change Item ID Enter step, **scan** the item's new barcode and **select** Modify.

You can customize the Replace Item Barcode helper by setting its properties.

11. Limit List by Due Date  

Using this helper with the Renew User Checkouts wizard, you can limit the items displayed on a renew list by the due date. Enter a date and time in the List Items Currently Due On or Before field, or select a date and time using the Calendar gadget. Only items with a due date on or before the specified date display in the item renew list.

12. Pay Bills  

Using this helper button, you can accept bill payment during another Circulation activity. This helper button only displays when the identified user has unpaid bills. A payment can be made for a single bill or applied to the total.

The amount owed glossary shows bill information, such as the amount of the bill, the billing date, billing reason, number of payments, number of notices, amount still owed, the date paid, and the billing library. If the patron has made any payments on the bill, the payment due date, payment amount, and payment type are shown for each payment. If the bill is for an overdue item, the glossary displays the date the item was checked out, the date it was due, the date the item was renewed (if applicable), the date the item was returned, and the circulation rule. This information is useful if the patron questions the bill.

If the amount of the bill and the amount the user still owes differ, either the user made a payment on the bill, or tax has been figured on the amount billed. The tax rate is set for each billing reason in the Bill Reason policy.

Once a bill has been paid, you can review the payment or continue the current process. If bills are not paid in full, you can also make more payments.
13. Add Brief Title

A brief title record may need to be added when a patron wants to check out an item that has not been cataloged. See (10.2 Item Maintenance, Add Brief Title)

- **Select** the Add Brief Title helper from within the wizard.
- **Add** a temporary title record to the catalog by entering title and author information. The title is required.
- Additional copy information displays, allowing you to change the type, library, or item ID (barcode). Item groups, locations, and libraries are specified in your library’s policies.
- After adding the temporary record, you can check out the item to the user.

**NOTE:** Although the server will assign an auto-generated item ID in place of an actual barcode, the library should keep a supply of random item barcodes on hand at the Circulation Desk to be used when adding temporary (on-the-fly) titles. Checking in the item will then be much simpler when it is returned.

14. Confirm Address

Using the Confirm Address helper button, you can display a user’s address for confirmation. The K-12 staff client remembers the previous user ID. If the address needs to be updated, changes can be made, or information can be added using the Before, After, and Delete helper buttons.

After the address has been confirmed or updated, you can return to the current wizard, review the address again, or make additional changes to the address.

15. Special Due Date

When checking out or renewing an item, you can set a special due date before scanning the item(s). Use the Calendar gadget to select a date in the Special Due Date field. Then select how long you want this date effective.

- **From now on** – the date you select will remain in effect for all users until you close the Checkout wizard or use the Clear Date action button. This date will display on the checkout screen.
- **For this user only** – the date you select will affect all the items this user checks out.
- **For this checkout only** – the date you select will affect only this one item.

After returning to the checkout or renewal process, scan the item’s barcode in the Item ID field.

16. Select Another Library

When you choose the Select Another Library helper in the Pending Transit wizard window, the Select Another Library window displays select a Library from the list.

- To view items in transit to another library, **select** the library name from the Library list, and then click OK.
17. Print User

Print User information by selecting the PRINT USER helper. This will allow for printing of user information from inside the wizard. The helper allows you to select to print All user information, or select from the following options.

• **Summary** — Prints user information from the Summary tab of the user record.

• **Addresses** — Prints all user address information.

• **Extended Information** — Prints all user extended information.

• **List of Checkouts** — By default, prints all Active checkouts. To change, select from the list options Active, All, Claims Returned, Inactive, Overdue, Recalls, Renewals.

• **List of Bills** — By default, prints all Unpaid bills. To change, select from the list options Unpaid, Paid, All.

• **List of Holds** — By default, prints all Holds. To change, select from the list options All, Available, Recalled, Reserve.

**Note:** For more detailed information or specific questions, search ONLINE HELP.
Check Out Items

The Checkout wizard guides you through the process of checking out materials to a library user.

1. **Click** on Circulation Wizard.
2. **Click** on the Checkout Wizard.

**NOTE:** If your checkout properties helper is set to “Start with search helper”, your user search screen will display first.

**Checkout** screen displays

3. **Locate** the **user** by scanning the user ID or using the User Search helper.

4. **Scan** the **item** ID or use the Item Search helper.

The checked out items will display on the List of Checkouts section.

5. **Continue** checking out items as appropriate.

**NOTES:** If a user is delinquent or blocked, a User Alerts Display screen may appear allowing you to investigate the reason for the status. This pop up box can be turned on or off in Checkout properties. (Check or uncheck “Display user blocks in separate window.”)

If a user is blocked, the override password is required to complete the checkout process.

If a user is barred, a popup window will display, regardless of the property setting, informing you of their status. You must change their status to OK in Modify User before they can Check out.

6. When the first user’s transactions are complete, **scan (or type)** in the next user’s barcode number. **Checkout** screen for next user will display. **Scan** items for this user.

7. **Select** from options:

**NOTE:** For more detailed information or specific questions, use HELP wizard.
TIP: If you prefer checking out by name rather than scanning a barcode:

1. Right **click** on CheckOut Wizard.
2. **Select** properties.
3. **Click** on the Helpers Tab.
4. **Click** on User Search.
5. **Click** on the Defaults Tab.
6. Choose **keyword** for search type.
7. **Select** Name for Search Index, enter your library, and choose a sort option.
8. Put a **check** in the Start with search helper box.
9. **Click** OK.
10. Now when you click on the checkout wizard, this is what you will see.

TIP: If students come to the library by homeroom and you want to check out by name:

1. **Repeat** all the steps above, **except** set your search index to Homeroom or Teacher and sort by User Name.
2. When a class comes in, **click** on the Checkout Wizard and **search** for the room you wish. (Remember, homeroom or teacher must be typed exactly as it appears in the student record.)
3. A list of students will display. **Highlight** the one you want and **click** Checkout to User.
4. **Check out** items. When done, **click** Check Out to new user.
5. This will return you to the class list. **Highlight** the next student’s name and click Checkout to User.
**TIP:** If you wish to checkout multiple items to the same patron, you may turn on **Cache Item IDs.** This allows you to scan multiple items into a single Item ID window. You will need to click the Check Out Item to User button to select another patron.

1. Right **click** on CheckOut Wizard.
2. **Select** properties.
3. **Click** on the Behavior Tab.
4. Place a **check** in Cache Item ID’s.
5. **Click** OK.
6. Click on Checkout Items, notice the larger Item ID field.
7. **Scan** the desired number of items.
8. When finished scanning, **click** the Check Out Item to User button.
9. All items scanned will be checked out to user.

**NOTE:** If an item cannot be checked out, an override password (obtain password from supervisor) will be required to complete the checkout process. When the password is entered an **Alerts Display** screen will appear explaining the reason for the status and allowing you to complete check out.
Special Due Date Helper

When checking out or renewing an item, you can set a special due date before scanning the item(s).

1. Use the Calendar gadget to select a date in the Special Due Date field.

2. Select how long you want this date effective.
   - From now on – the date you select will remain in effect for all users until you close the Checkout wizard or use the Clear Date action button. This date will display on the checkout screen.
   - For this user only – the date you select will affect all the items this user checks out.
   - For this checkout only – the date you select will affect only this one item.

3. After returning to the checkout or renewal process, scan the item’s barcode in the Item ID field. The special due date will display above that field for all users until the date is cleared.

Using Circ Notes

Circ notes will display when an item is checked in and checked out if “Display Circulation note” is checked in properties for those wizards.

You can enter the circ note on an item’s record under Extended information.
Printing User Information

Print User information by selecting the PRINT USER helper. This will allow for printing of user information from inside the wizard. The helper allows you to select to print All user information, or select from the following options.

- **Summary** — Prints user information from the Summary tab of the user record.
- **Addresses** — Prints all user address information.
- **Extended Information** — Prints all user extended information.
- **List of Checkouts** — By default, prints all Active checkouts. To change, select from the list options Active, All, Claims Returned, Inactive, Overdue, Recalls, Renewals.

- **List of Bills** — By default, prints all Unpaid bills. To change, select from the list options Unpaid, Paid, All.
- **List of Holds** — By default, prints all Holds. To change, select from the list options All, Available, Recalled, Reserve.
- **List of Suspensions** — Prints all Active suspensions for the user
- **List of Routings** — Prints all bookings for the user (Materials Booking), not currently supported.

**NOTE:** You can also use the Print function from the Printer icon in the Common Tasks toolbar; but if you do, you can only print the whole record. There is no option to print a specific screen.

**HINT:** If information is wrapping, try changing the page setup to Landscape (before printing, look at the print preview (toolbar ➔ file ➔ print preview)).
Check In Items

1. **Click** on Circulation Wizard group.
2. **Click** on Check In Wizard.

**Check In: Identify Item** screen displays.

**NOTE:** If the Check in property is set to display user information, the information will be displayed at the top of the screen.

- **3. Scan or type** item barcode number or use the Item Lookup helper.
- **4. If appropriate, continue** to next item to be checked in.

As Items are scanned, the following Information will display:

- **Title**
- **Item ID** of item being returned.
- **Where item is to be routed** (AVAILABLE, RESERVES, Transit to another LIBRARY, etc.)
- **Amount billed** if item is fined for being overdue.
- **Amount paid automatically** if applicable.
- **User ID** of user returning item (click on platform to display user record, transaction history)

**NOTE:** Caution – watch screen carefully as items are checked in, various messages may appear.

*If an item is scanned, but was NOT checked out through the system, a Check In: Error message will appear in a separate window, or on the list of items checked in, depending on your check in property setting.*

5. **Select** from Options:
**Accumulate Fines**

This function allows you to total selected bills and accept payment on them without leaving Checkin.

1. **Click** on Circulation Wizard group.
2. **Right Click** on Check In Wizard.
3. **Click** on Properties.
4. **Bullet** Accumulate Fines Yes or Prompt. This only needs to be done once.
5. **Click** Yes to accumulate fines.
6. **Check in** all items.

- **List of checkins**

7. When finished, **click** on User header. This will group all the items returned by the same user together.
8. **Click** the Pay Bill helper.
9. **Enter** payment information.
   - a. You can accept a payment on the total amount due. **OR**
   - b. You can accept a payment for individual patrons or individual items. Enter the amount in the payment column in the appropriate box.
10. **Click** Pay Bills to exit and accept all payments.
Printing User Information

**Print User** information by selecting the **PRINT USER** helper. This will allow for printing of user information from inside the wizard. The helper allows you to select to print All user information, or select from the following options.

- **Summary** — Prints user information from the Summary tab of the user record.
- **Addresses** — Prints all user address information.
- **Extended Information** — Prints all user extended information.
- **List of Checkouts** — By default, prints all Active checkouts. To change, select from the list options Active, All, Claims Returned, Inactive, Overdue, Recalls, Renewals.
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- **List of Holds** — By default, prints all Holds. To change, select from the list options All, Available, Recalled, Reserve.
- **List of Suspensions** — Prints all Active suspensions for the user
- **List of Routings** — Prints all bookings for the user (Materials Booking), not currently supported.

**NOTE:** You can also use the Print function from the Printer icon in the Common Tasks toolbar; but if you do, you can only print the whole record. There is no option to print a specific screen.

**HINT:** If information is wrapping, try changing the page setup to Landscape (before printing, look at the print preview (toolbar → file → print preview)).
Renew Single Item

The Renew Item wizard guides you through the process of renewing a single checked-out item. This wizard may be used when the user comes into the library with the item to be renewed in hand.

1. **Click** on Circulation Wizard Group.
2. **Click** on the Renew Single Item Wizard.

3. **Renew Single Item** screen displays.

4. To renew the item and record the renewal as a "seen" renewal, select the **Mark Item as Seen** check box before scanning or typing the item ID. (A "seen renewal" indicates item is physically present at the time of renewal)

5. **Scan** the item's barcode number.

6. **Renew This Item?** screen displays (if property settings are not set to review items before renewing – can be turned off).

7. **Select** Renew This Item or Do Not Renew.

**Renew Item:** screen displays with the renewed item, new due date, and any associated bills displayed.

Select from options.
Exceptions to the Renewal Process

_Holds Block Override_ screen will display if the item has a hold by another user.

Options:

1. Override & Renew Item.
   a. _Type_ in the “hold block override” password.
   b. _Click_ on Override & Renew Item.

   OR

2. _Click_ on Do Not Renew Items.

Note: For more detailed information or specific questions, use HELP wizard.
Renew User Checkouts

The Renew User Checkouts wizard guides you through the process of renewing a user's checked-out materials. This wizard is designed to handle renewal of items that are not physically presented at the desk for renewals.

1. **Click** on Circulation Wizard Group.
2. **Click** on Renew User Checkouts Wizard.
3. **Locate** user's record.

   **Renew User** screen displays.

   ![Renew User Checkouts](image)

   4. **Select** items to be renewed.
      a. To renew all eligible items, **check** the Select All box.
      b. To renew specific items, **check** the boxes next to each item to be renewed.
      c. To record the renewal as a “seen” renewal, place a checkmark in the Select all seen check box before scanning or typing the item ID. (A “seen renewal” indicates item is physically present at the time of renewal).

4b. ![Renew This Item?](image)

   5. **Click** Renew selected items at the bottom of the screen.

   **Renew This Item?** screen displays (if property setting is to review the renewals).

6. **Click** on Renew This Item or Do Not Renew.

   **Renew User** screen displays.

7. **Select** from options.
TIP!  Resize columns so you can see more of the title!  Click on the line between columns and drag in the direction you wish.

Before:

<table>
<thead>
<tr>
<th>Current user checkouts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Items eligible for renewal: 2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Renew</th>
<th>Title</th>
<th>Item ID</th>
<th>Date Due</th>
<th>Reserve</th>
<th>Status</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐</td>
<td>Harry Potter ... 3262006515...</td>
<td>7/27/2005,2...</td>
<td></td>
<td></td>
<td>FICTION</td>
<td></td>
</tr>
<tr>
<td>☐</td>
<td>Harry Potter ... 3262006515...</td>
<td>7/27/2005,2...</td>
<td></td>
<td></td>
<td>FICTION</td>
<td></td>
</tr>
</tbody>
</table>

After:

<table>
<thead>
<tr>
<th>Current user checkouts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Items eligible for renewal: 2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Renew</th>
<th>Title</th>
<th>Item ID</th>
<th>Date Due</th>
<th>Reserve</th>
<th>Status</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐</td>
<td>Harry Potter and the goblet of... 326200651...</td>
<td>7/27/2005,2...</td>
<td></td>
<td></td>
<td>FICTION</td>
<td></td>
</tr>
<tr>
<td>☐</td>
<td>Harry Potter and the prisoner ... 326200651...</td>
<td>7/27/2005,2...</td>
<td></td>
<td></td>
<td>FICTION</td>
<td></td>
</tr>
</tbody>
</table>

Note: For more detailed information or specific questions, use HELP wizard.
Paying Bills

The Paying Bills wizard guides you through the process of accepting payments for current bills.

1. **Click** on Circulation Wizard.
2. **Click** on Paying Bills Wizard.
3. **Locate** user record.
   - Paying Bills: User Alert screen displays.
4. **Click** OK.
   - Paying Bills screen displays.
5. Payments can be made on the total bill or for a specific item.
   - a. To pay on the total balance, **enter** amount received and **select** payment type from the drop down menu.
   - b. To pay on a specific item, **enter** the amount received (can be full amount or partial) and **select** payment type. Clicking in the payment column will bring up a menu.
6. **Select** from options.
TIP! To see the payment history on a specific item, click on the dollar amount owed for that item.

<table>
<thead>
<tr>
<th>Item information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title: Harry Potter and the goblet of fire</td>
</tr>
<tr>
<td>Author: Rowling, J. K.</td>
</tr>
<tr>
<td>Call#: FIC ROW 6.8</td>
</tr>
<tr>
<td>Copy: 1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Bill information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Billed: $8.99</td>
</tr>
<tr>
<td># payments: 3</td>
</tr>
<tr>
<td>Still owes: $4.79</td>
</tr>
<tr>
<td>Library: LMHS</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Payments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment date: 7/13/2005</td>
</tr>
<tr>
<td>Payment date: 7/13/2005</td>
</tr>
<tr>
<td>Payment date: 7/13/2005</td>
</tr>
<tr>
<td>Payment date: 7/13/2005, 15:26</td>
</tr>
</tbody>
</table>

To see a history of all payments:
- Click on Display User wizard.
- Choose the Bills tab.
- Click on Display Options
- Select paid.

Harry Potter and the goblet of fire 32620065159029 PROCESSFEE $.00 $2.00 7/13/2005

Note: For more detailed information or specific questions, use HELP wizard.
Billing a User

The Bill a User wizard guides you through the process of issuing a bill to a user.

1. **Click** on Circulation Wizard.
2. **Click** on the Billing a User Wizard.
3. **Locate** user.

![Billing a User Screen](image)

### User Information
- **Name:** Pery, KURT
- **Profile name:** STUDENT3...
- **Library:** DLFN
- **User categories:** Y
- **Homeroom:** 5B-SOMMERS
- **Status:** BLOCKED
- **Amount owed:** $19.15
- **Available holds:** 0
- **Overdues:** 1
- **Privilege expires:** 6/30/2014
- **User ID:** 22612001407002

### Enter Item & Bill Information
- **Reason for bill:** DAMAGE
- **Amount:** 2.50
- **Item ID:** 32612010004962
- **Payment type:** CASH

### List of Bills

<table>
<thead>
<tr>
<th>Title</th>
<th>Item ID</th>
<th>Reason</th>
<th>Billed</th>
<th>Bill Status</th>
</tr>
</thead>
</table>

**Billing a User** screen displays.

4. **Select** Reason for bill from drop down menu.
5. **Enter** the amount to bill - use x.xx format.
6. **MANUALLY Enter** the Item ID (will only be required if bill is related to an item).
7. **Select** Payment type (leave at CASH if paying later)
8. **Click** Bill User to record bill or Pay Now to take a payment. It will be automatically recorded.
9. **Select** from options.

**Note:** For more detailed information or specific questions, use HELP wizard.
Credit User Account – Credit Account

The Credit User Account wizard is used to manually create (add) a credit or withdraw credit from a user’s credit account. Using this wizard, you can deposit funds into a user’s credit account, manually refund a previously paid bill, or manually withdraw funds from the account for other library-defined reasons.

1. **Click** on Credit User Account Wizard.

2. **Enter** the user i.d.

   **NOTE:** If your checkout properties helper is set to “Start with search helper”, your user search screen will display first.

3. If configured in the wizard properties, the complete transaction history for the user displays under Credit Transactions Account.

4. **Enter** the amount in the amount field to create a credit, use x.xx format.

5. **Select** the credit payment type from the Payment Type list.

6. **Select** the reason for issuing the Credit from the Credit Reason list.

   ![Credit User Account Wizard](image)

**NOTE:** If you are creating a credit, and the user does not have an existing credit account in the database, the wizard will display a message indicating that the user does not currently have a credit account, and an account will be created automatically for the user. The initial balance for the user’s credit account is 0.00. You can then continue to manually add credits to the user’s account.
Credit User Account – Manual Refund

The Manual Refund helper in the Credit User Account wizard is used to manually issue refunds for paid bills for users with credit accounts.

1. To issue a refund, use the Manual Refund helper.

2. **Select** the Select All check box if you wish to refund all paid bills.

3. **Select** the check box in the Refund column for the bill if you wish to refund a specific bill.

### Credit User Account – Manual Refund

*Paid bills: 5 ($6.50)*

<table>
<thead>
<tr>
<th>Refund</th>
<th>Title</th>
<th>Item ID</th>
<th>Reason</th>
<th>Ow...</th>
<th>Bill...</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑</td>
<td>Yellow boat</td>
<td>3261201... LOST</td>
<td>$0.00</td>
<td>$6.83</td>
<td></td>
<td>6/25/2008</td>
</tr>
<tr>
<td>☑</td>
<td>Famous peop...</td>
<td>3261201... LOST</td>
<td>$0.00</td>
<td>$20.00</td>
<td></td>
<td>6/25/2008</td>
</tr>
<tr>
<td>☑</td>
<td>Exceptional</td>
<td>3261201... LOST</td>
<td>$0.00</td>
<td>$19.00</td>
<td></td>
<td>6/25/2008</td>
</tr>
</tbody>
</table>

**Note:** If a refund could not be made for a selected bill, a dialog box displays the reason the refund was denied. If a refund had been previously refunded, credit reason, payment type, amount, and refund date display.

4. **Click** OK. The refunded bill information is added to the list of refunds posted under Credit Transaction Account.
Credit User Account – Manual withdrawal of funds

1. **Click** the Manual Withdrawal helper to manually withdraw funds.

2. **Enter** the amount of funds to be withdrawn from the credit account in the amount field, use x.xx format.

3. **Select** the form of withdrawal payment (for example, CASH) in the Payment Type field.

4. **Select** the reason for the withdrawal in the Credit Reason field.

5. **Click** Withdraw funds.
Credit User Account – Close Account

**CAUTION – Credit User Account CANNOT be recreated once closed**

If NO balance:

1. Select manual withdrawal helper.
2. Click Close Account.

If balance remains:

1. Select manual withdrawal helper.
2. Enter balance to withdraw and credit reason.
3. Click Withdraw Funds.
4. Do you want to close the account? Click “Yes”

Note: For more detailed information or specific questions, use HELP wizard.
Fine Free Check In Wizard

The Fine Free Check In wizard allows you to turn off fine charges when overdue items are returned to the library. You can use this wizard when checking in items you don’t want to collect fines for, such as for a designated fine free day, or an unplanned calamity day.

When overdue items are discharged with this wizard, fines and suspensions will NOT be assessed for the user. The wizard performs all other discharge functions, such as transits, check for holds, and update item records that the existing check-in wizards do except for fines and suspensions.

To use this wizard, perform the following steps:

1. **Click** on Circulation Wizard.
2. **Click** the Fine Free Check In wizard.

3. In the Item ID box, **scan** the item’s barcode. Notice that the item displays in the List of check-ins and the user displays in the User Information.

4. Repeat the previous steps until all items are checked in.

After discharging the items, select one of the following options:
Notes

- To sort items in the List of Discharges in ascending or descending order, click the column heading of the column you want to sort.
- If a Current record exists for the item, click the Current record button to access the last record displayed, modified, or added.
- Click the glossary links to display more detailed information.
- When a user’s record is located, information from the user record displays under User Information. User Information only displays if the Configure Display of User Status Header attribute in the Global Configuration wizard is set to Display User Status Header in Circulation Wizards.

Note: For more detailed information or specific questions, use HELP wizard.
Table of Contents
Special Circulation Functions
Section 7

7.1 Bookdrop Check In
7.2 User Claims Returned
7.3 User Lost Card
7.4 Modify Due Date
7.5 Mark Item Used
7.6 Ephemeral Checkout

See Sec. 14.2 Inventory Item
See Sec. 14.2 Scanner (Inventory Transfer)

7.7 Pending Transits
7.8 Receive Transit
7.9 Inter-Library Loan

Helper Buttons which display on circulation windows.

| Lookup User | Renew Privilege | Add Brief Title |
| Register New User | Item Search | Confirm Address |
| User Lost Card | Check Item Status | Special Due Date |
| Display User | Change Item ID | Select Another Library |
| Copy User | Limit List by Due Date | |
| Modify User | Pay Bills | |
Bookdrop Check In

The Bookdrop Check In wizard guides you through the process of checking in multiple items left in the bookdrop or when the library is unexpectedly closed.

1. Click on Special Circulation Functions
2. Click on Bookdrop Check In Wizard.

Bookdrop Check In screen displays.

3. Type in the check-in date or use the calendar gadget to select the date (a date in the past or a date in the future can be selected).

   **NOTE:** When using this function to check in items due on an unexpected “closed” day, set the check-in date to the actual date the items were due.

4. Scan or type in item barcode number or use the Item Search helper.
   a. After the item is scanned, the title of the book will appear.
   b. The user's ID will display.

5. If an item requires an additional action, an alert window will appear, if property setting indicates.

6. If appropriate, continue checking items in.

7. Select from options:

   ![Check In Item] ![Clear Checkin List] ![Close]

   **Note:** For more detailed information or specific questions, use HELP wizard.
User Claims Returned

If a user receives an overdue notice, but claims to have returned the materials earlier, use the User Claims Returned wizard to mark the materials with a “claims returned” date.

When you mark an item with a claims returned date, the Claims Returned field value in the user record is increased by one. The value shows the number of times a patron has claimed to have returned materials during the history of the patron’s use of your library. Since this number is a historical counter, the value does not decrease if the items are later found and checked in, or marked as MISSING or LOST. This historical counter can be useful in determining if a patron is abusing his or her library privileges. The Claims Returned value can only be removed manually from the user record by staff with appropriate access.

1. **Click** on Special Circulation Functions Wizard Group
2. **Click** on User Claims Returned Wizard
3. **Locate** the appropriate User.

4. Title and date due for all items checked out to that user display in the List of Checkouts.

5. **Use** the calendar gadget to select the date for the claims returned item.

6. **Click** Ok to save the entries.
7. User record will now display date next to the items that user claims to have returned.

8. Select from options:

NOTES:

- Once the item is marked, the user no longer accrues overdue fines for that item, however the item continues to appear on the patron's current checkout list with a status of Claims Returned and will appear on overdue fine lists.

- If the claims returned date is the same as, or falls before the due date, the patron will not accrue any fines.

- If the claims returned date is after the item's due date, fines are calculated on the days overdue up to and including the claims returned date, and are billed to the user.

- If the claims returned item is eventually marked as Lost, the user may be billed for processing fees and/or the cost of the item if your library's policies are set to bill a user for the lost item.

Note: For more detailed information or specific questions, use HELP wizard.
User Lost Card

The User Lost Card wizard guides you through the process of replacing a user's ID number.

**NOTE:** If your district is using automatic patron update for student processing, Do Not change the student's ID number.

1. **Click** on Special Circulation Functions Wizard Group.
2. **Click** on User Lost Card Wizard.

User Lost Card search screen displays.

**NOTE:** If the User Lost Card properties helper is set to “Start with search helper”, your User Search screen will display first.

3. **Select** the appropriate user.

User Lost Card screen displays

4. **Verify** this is the correct user.

5. **Click** in the New user ID box and **type or scan** the new (14-digit) ID number.

6. **Select** from options.

Note: For more detailed information or specific questions, use HELP wizard.
Modify Due Dates

Sometimes, the library may extend an item's due date temporarily if the user is not able to return the materials by the due date, such as when the user is out of town. The Modify Due Dates wizard guides you through the process of modifying an item's due date.

1. **Click** on Special Circulation Functions
2. **Click** on Modify Due Dates Wizard.

Modify Due Dates user search screen displays.

**NOTE:** If the Modify Due Dates properties helper is set to “Start with search helper”, your User Search screen will display first.

3. **Select** the appropriate user.

Modify Due Dates screen displays.

4. **Check** the individual titles to modify due date or **Click** the Select All option.

5. **Click** Apply Same Due Date to select the same due date for each/all selected item(s) if desired.

6. **Click** the calendar gadget next to the appropriate Title or Apply Same Due Date to select the modified date due.

7. **Click** Modify User Due Dates to save your changes. You will see Record updated for the item(s) modified.

8. **Select** from options:

Note: For more detailed information or specific questions, use HELP wizard.
Mark Item Used

Items retrieved from the various areas of the library, such as the Reference section, may be marked as used for statistical purposes. These items are not actually checked out. The Mark Item Used wizard guides you through the process of marking an item as having been used. Items that are currently checked out can also be marked as “used” (alert screen appears).

1. **Click** on Special Circulation Functions Wizard Group
2. **Click** on Mark Item Used Wizard

3. **Type** or **scan** the item number or use the lookup item button.

4. When completed, a list of items marked “used” displays. You can **view** specific item information using the glossary. In-house uses: displays a count of times used.

5. **Select** from options:
   - Mark Item Used (o)
   - Clear List
   - Close

**Note:** For more detailed information or specific questions, use HELP wizard.
Ephemeral Checkout - Checking Out Impermanent Materials

The Ephemeral Checkout wizard guides you through the process of checking out impermanent materials to a library user. Libraries may have items that they want to circulate, but do not want to track for overdue notices or billing purposes. Impermanent materials can include items such as donated paperbacks and pamphlets.

This wizard checks out a number of copies to an item ID you created for a type of impermanent materials. For Example, your library uses an item ID of HEALTH for physical fitness pamphlets. The user wants to check out three fitness pamphlets, so you would enter 3 in the # Copies field, and HEALTH in the Item ID field.

The Ephemeral Checkout wizard checks an item out and then immediately checks it in. The wizard repeats the checkout and checkin sequence for every copy presented for checkout. In the health pamphlets example, the Ephemeral Checkout wizard would repeat the checkout and checkin sequence for all three pamphlets in one transaction.

The checkout transactions are recorded for statistical reports and checkout data, but they are not used for generating late notices or bills. If you display an item’s record, checkouts done with the Ephemeral Checkout wizard do not display in the list of current checkouts, but they are counted in the total number of checkouts for the item.

1. **Click** on Special Circulation Functions..
2. **Click** on the Ephemeral Checkout Wizard.
3. **Select** the appropriate user.
4. **Scan** the Item ID or use the Item Search Helper.
5. **Enter** the number of copies being checked out.
6. **Select** from options

**NOTE:** Since items are immediately checked in, they will not appear on a student's record.

**Note:** For more detailed information or specific questions, use HELP wizard.
Pending Transits

The Pending Transits wizard displays a list of items that are currently in transit to your library or a selected library. You have the option of receiving them. This wizard is useful for getting lists of transit items or receiving them without the item in hand.

1. **Click** on Special Circulation Functions Wizard group.
2. **Click** on Pending Transits Wizard.

Pending Transits screen displays.

3. **Select** the Item to receive.
4. **Click** the Receive Item button.
5. A List of items received will be displayed at the bottom of the screen.

**TIP:** You can resize the columns to see more of the title or the history of the item by clicking on the line between the columns and dragging in the appropriate direction.
Viewing items in transit to another library:

1. If no items are in transit to your library, a message will display. **Click** OK.

2. You will be given the option to view transits for another library. **Select** a library from the drop down menu.

3. If you choose to receive an item from another library, you will need to **enter** a password.

**TIP:** The Select Another Library wizard will also allow you to select another library.

**Note:** For more detailed information or specific questions, use HELP wizard.
Receive Items in Transit

The Receive Transit wizard takes items out of transit status and gives them available status in your library. Use this wizard if you have the item in hand.

1. **Click** on Special Circulation Functions Wizard group.
2. **Click** on Receive Items In Transit Wizard.

*Receive Items in Transit* screen displays.

3. **Type or scan** the Item ID to receive.
4. **Click** Receive Item.

<table>
<thead>
<tr>
<th>Title</th>
<th>Item ID</th>
<th>Route/Transit To</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calder pride</td>
<td>326200000177680</td>
<td>AVAILABLE</td>
<td></td>
</tr>
</tbody>
</table>

*Current Status of Item ######* screen displays.

5. **Select** from options.

NOTE: For more detailed information or specific questions, use HELP wizard.
InterLibrary Loan

This procedure will allow you to check out items to another library. Then that library can check them out to their patrons.

1. **School A** requests item(s) from School B. *Do not use WorkFlows for this step.*

2. **School B** uses the checkout wizard to **check out** the item(s) to School A’s ILL user. This will be “building code dash ILL” ex. LMWE-ILL - this user has already been created for all libraries.

   **NOTE:** As items are checked out, they will appear in a list at the bottom of the screen.

3. When all items have been checked out, **send** them to the **School A**.
4. **School A** checks in the item(s) using the Check in wizard or the Receive Transit wizard.

5. **School A checks out** the item(s) to the user using the Checkout wizard (uses School A circulation policies).

6. **School A checks in** the book(s) when returned from user using the Check in wizard.

**NOTE:** The Route/Transit To column says ILL. At this point you can check out the item to another user (repeat step 5) or return it to the owning library (Step 7).

7. **Scan** the item a second time while you are still in the Check in wizard. The Route/Transit To column will tell you which building to send the item to.

8. **School A** sends the item(s) back to School B.

9. **School B checks in** the item(s) using the Check in wizard or the Receive Transit Wizard.

**NOTE:** Use only the barcode on the book to check it in and out. Do not put a different barcode on the book for ILL (InterLibrary Loan).
What happens when an item is checked out to the ILL user, but request is cancelled (item is NOT sent)? How do you make the item “Available” again in the owning library (School B)?

Scenario – School B has checked the items out to the ILL user for School A (Step 2). School A decides they do not need the items.

1. **Click** on Special Circulation group/ PENDING TRANSITS wizard, you may see the following message, or a list of items intransit to your building. (However, these items are now intransit to the other library).

2. **Click OK.** Click on Gadget, select “School A” from the drop-down menu:

   ![Pending Transits](image)

   Intransit list will display. The items you have sent (but were not received) will display “For temporary shelving”.

<table>
<thead>
<tr>
<th>Item</th>
<th>Title</th>
<th>Checking Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>985.21 WAL</td>
<td>Big men, big country; J. Neilson.</td>
<td>2/27/2009</td>
<td>For temporary shelving</td>
</tr>
<tr>
<td>RC 100</td>
<td>Bringing the rain to Kapiolani</td>
<td>2/27/2009</td>
<td>For temporary shelving</td>
</tr>
<tr>
<td>RC 610</td>
<td>Danger on Koolau Peak</td>
<td>2/27/2009</td>
<td>For temporary shelving</td>
</tr>
<tr>
<td>CAR RC 300</td>
<td>Dream show</td>
<td>2/27/2009</td>
<td>For temporary shelving</td>
</tr>
</tbody>
</table>

3. **Select** item, **click** “Receive item”; you will need to use **override code** to complete:

   ![Override Required](image)

   Translated item override  

   OK | Cancel
4. Item will now display as “Checked Out” – do NOT put item in transit again – **click** “Cancel”.

5. School B will now **check** item in (Checkin wizard), item status will now be **AVAILABLE** at owning library.

---

**Note:** For more detailed information or specific questions, use HELP wizard.
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8.2 Display Circulation Sets
8.3 Add Circulation Sets
8.4 Modify Circulation Sets
8.5 Remove Circulation Sets

Helper Buttons which display on Circulation Sets windows.

Item Search
Circulation Sets Overview

The Circulation Sets feature allows libraries to group individual items together to circulate as one set of items. Uses can include grouping a set of the same title for classroom use, creating kits, and creating a temporary themed set for a classroom.

Types of Sets

1. Parental: these sets use the barcode number from one of the items in the set as the set ID. If there are a variety of materials in the set with different loan periods (ie. Videos - 2 days, books – 3 weeks), the set will circulate with the loan period of the item used for the set ID.

2. Non-parental: these sets use a separate ID number for the set ID. If items in the set have different loan periods, they will have different due dates when the set is checked out.

Creating and Maintaining Circulation Sets

- You must group together at least two Item IDs to make a set.
- Set IDs must be valid barcode numbers.
- An item cannot belong to more than one circulation set.
- If creating a large set where the override in loan policies (maximum checkouts) could be met, discuss changing your policies with your ITC provider.
- When you are doing inventory, you must scan EACH item in the set. Sorry, no short cut there!

Permanent and Temporary Circulation Sets

Permanent Circulation Sets

When creating the set, check “Circulate as Set”. This is good for classroom sets of the same title and themed kits. These items cannot be checked out individually, only as a set.

Temporary Circulation Sets

Often teachers request the same items or themes year after year. Create a set for those titles. Do not check Circulate as Set. The items can circulate normally during the year until the teacher wants them. At that time, use the Modify Sets wizard to check Circulate as Set.
Checking out Circulation Sets

Options

1. When you are checking out a set, you can scan any item in that set if “Circulate as a Set” was checked when you created the set.

2. If you have a set ID and a printed barcode on the container, just scan that in the Checkout Wizard. It will check out all items with one scan.

3. If you are checking out a set without a printed barcode,
   - Search for the set in checkout. (search for 3, index = Set ID).
   - Highlight the set you want from the results list.
   - Click the Check out item button.

REMINDER – loan periods are dependent on the user profile (STUDENT or FACULTY)

Checking in Circ Sets

1. **Open** the Checkin Wizard.

2. **Scan** one of the items.

3. A pop up screen will list all the items in the set. If all items were returned, **leave** select all checked and **click** the checkin button.

**NOTE:** Unchecking the Select All button will remove all the checks. If only one or two items are not returned, you can uncheck those titles and they will not be checked in.

**Note:** For more detailed information or specific questions, use HELP wizard.
Display Circulation Sets

The Display Circulation Sets wizard is used to display a list of all items contained in a circulation set. If you type a set ID, all the items belonging to the set display.

1. **Click** on Maintain Sets Wizard Group.
2. **Click** on Display Circulation Sets.

3. **Type** the Set ID or **use the Search by Set ID Helper** to find the set.
   a. Enter 3 for the search term. (All set IDs will begin with a 3)
   b. Click Search.

Search results screen will display.

a. Items in Set tab: lists items and individual item information.

b. Description tab: displays information about the set – type, number of items, etc.

**Note:** For more detailed information or specific questions, use HELP wizard.
Add Circulation Set

The Add Circulation Sets wizard is used to create a circulation set.

1. **Click** on Maintain Wizard Group.
2. **Click** on Add Circulation Set.
3. To add titles to your set, **type or scan** the Item ID. You can also use the Item Search Helper to search for the item ID.
4. **Click** Add Item to Set.
5. **Repeat** this process to add more items to the set. You must have at least two Item IDs to make a set.
6. Once you have added all the items to the set, **determine** the Set ID:
   - Parental: (one of the items in the set is the parent)
     a. Check the Parental box.
     b. The system will assign parent status to one of the titles in the set.
     c. If you wish to change the parent title, highlight the one you want from the list and click Make Parent.
   - Non-parental: (a separate 14 digit number is Set ID)
     a. Leave parental box **unchecked**.
     b. **Allow** the system generated Set ID to remain or enter a dumb barcode number.
7. Do not change category.
8. **Enter** a description of the set. Make description clear and consistent as you will be using this to locate the set in Workflows.
9. **Determine** Circulation options:
   1. Circulate as Set **checked** - items within the set can only circulate as part of the set.
   2. Circulate as Set **unchecked** - items within the set can circulate individually.
10. **Click** Add Set to keep your changes and save the set.

After adding this set, you can clear to clear this list from the wizard window and add another circulation set or Close to exit the wizard.

**Note:** For more detailed information or specific questions, use HELP wizard.
Modify Circulation Sets

The Modify Circulation Sets wizard is used to change the makeup of a circulation set. You can use this wizard to change the description, parental status, change circulation options, and add or remove items from a circulation set. To remove an entire set, use the Remove Circulation Sets Wizard.

1. **Click** on Maintain Sets Wizard Group.
2. **Click** Modify Circulation Sets wizard.
3. **Locate** the appropriate user record.

4. To change the Set ID:
   - Type or scan the new ID number.
5. Do not change the Category!
6. Modify the Description of the set, if desired.
7. To change the parental status:
   - check or uncheck the parental box.
   - If you change from parental to non-parental, you will be able to add a set ID.
   - If you change from non-parental to parental, you will be able to check the title you want for the parent ID.
8. To change circulation options, **check or uncheck** Circulate as Set.
9. To add more titles to the set,
   - **Click** Add Item to Set button at the bottom of the screen.
   - **Enter** the item ID
   - **Click** Save Set.
10. To remove items from the set,
    - Put a check in the box next to titles you wish to remove.
    - **Click** Save Set. Titles will be removed from the list.
11. **Click** Save Set when all changes have been made.

**Note:** For more detailed information or specific questions, use HELP wizard.
Remove Circulation Sets

The Remove Circulation Sets wizard is used to remove a circulation set. To remove individual items from a set, use the Modify Circulation Sets Wizard.

1. **Click** on Maintain Sets Wizard Group
2. **Click** on Remove Circulation Sets Wizard

3. **Type or scan** the Set ID. You can also search and select the desired title from the results list.

4. **Click** the Remove button.

5. **Click** Yes to continue and remove the set or **click** no if you want to keep it.

6. After removing a circulation set, you can remove more sets or close.

**Note:** For more detailed information or specific questions, use HELP wizard.
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Place Hold

The Place Hold Wizard guides you through the process of placing holds on library materials.

1) **Click** on Holds Maintenance Group
2) **Click** on Place Hold Wizard
3) **Locate** the appropriate User
4) **Type or scan** Item ID or use Item Search helper.
5) Accept the Hold Information defaults or make your selections.
   a) **Click** Pickup Library and select the library code.
   b) Expires: **Click** the gadget and select the date for the hold to expire.
   c) Comments may be added.
   d) Use the Date suspended and Date unsuspended to clear a hold for a date range and then reinstate hold.
   e) Level/Range –
      i) **Click** Copy for a specific item to be placed on hold.
      ii) **Click** Title for the first available copy of the title to be placed on hold.
   f) Recall status - recall checked out item.
      i) Allow
      ii) No Recall (Default)
      iii) Recall Now (Rush)
   g) Make first in queue
6. If list of titles displays, **select** the desired title, then **select** the desired item.

   **NOTE**: If placing a TITLE hold, selecting one item will suffice, the hold will be effective on all items on the TITLE.

7. **Click** Place Hold on Selected Item.
8. If a Title hold is placed, **Click** Place Hold.

   **NOTE**: The system will only let you place holds on books that are not on the shelves (can be overridden).

   **NOTE**: For more detailed information or specific questions, use HELP wizard.
Display User Holds

The Display User Holds wizard guides you through the process of displaying all holds placed by a specific user. This wizard is useful when a user asks if any of the holds are available.

1. **Click** on Holds Maintenance Group.
2. **Click** on Display User Holds Wizard.

*Display User Holds* screen displays.

3. **Select** the appropriate user.

4. **Review** information in the Holds section of the screen.

5. **Select** from options:
   - Display This User's Holds
   - Display Another User's Holds
   - Close

Note: For more detailed information or specific questions, use HELP wizard.
Modify Holds for User

The Modify Holds for User wizard guides you through the process of modifying a user's holds. This wizard also allows you to add comments about a user's hold.

1. **Click** on Holds Maintenance Group.
2. **Click** on Modify Holds for User Wizard.

Modify Holds for a User screen displays.

3. **Select** the appropriate user.
4. The Modify Holds for User screen identifies the user and displays a list of holds placed by the user.
5. **Click** in the check box next to the title you will modify.
6. **Click** the Modify button.

Modify Holds for User: (student) screen displays.

You may **modify** the following information.

- Pickup Library
- Expires (expiration date)
- Date Suspended (suspend hold dates for a period of time)
- Date unsuspended
- Comment (Add, Append, Replace, or Remove comment)

7. **Click** OK to save changes.
8. **Select** from options:

Note: For more detailed information or specific questions, use HELP wizard.
Remove User Hold

The Remove User Hold wizard guides you through the process of removing holds placed by a specific user.

1. **Click** on Holds Maintenance Group.
2. **Click** on Remove User Hold Wizard.

*Remove User Hold* screen displays.

3. **Select** the appropriate user.

*Remove User Hold* screen displays.

4. **Click** in the check box next to the title you will remove or **click** on Select All to choose all titles.

5. **Click** the Remove Holds button.

Holds will be removed and the screen returns to the lookup user for remove holds.

6. **Select** from options:

- Get User Information
- Remove Holds
- Remove Holds for Another User
- Close

*Note: For more detailed information or specific questions, use HELP wizard.*
Display Title Holds

The Display Title Holds wizard guides you through the process of displaying a list of all holds placed on a title.

1. **Click** on Holds Maintenance Group.
2. **Click** on Display Title Holds.

*Display Title Holds: Item Search* screen displays.

3. **Type** in the Search for: box the text for your search.

4. If a list displays, **select** your item and **Click** OK.

*Display Title Holds* screen displays.

**NOTE:** Click on the Detailed Hold Count helper to view counts of this title and current holds for your library or entire database

5. **Select** from options:

   - Display Another Title's Holds
   - Close

**NOTE:** For more detailed information or specific questions, use HELP wizard.

Last Updated July 2010

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Display Item Holds

The Display Item Holds wizard guides you through the process of displaying a list of all holds placed on a title.

1. **Click** on Holds Maintenance Group.
2. **Click** on Display Item Holds.

**Display Item Holds** screen displays.

3. **Type** in the Search for: box the text for your search.

4. If a list displays, **select** your item and **Click** OK.

**Display Item Holds** screen displays.

**NOTE:** Click on the Detailed Hold Count helper to view counts of this title and current holds for your library or entire database.

5. After you have viewed holds placed on an item, you can **select** one of the following steps:

**NOTE:** For more detailed information or specific questions, use HELP wizard.
Reorder Hold Queue

The Reorder Holds Queue wizard allows you to re-order the hold queue for a title and move a hold or group of holds up or down in the queue. Only available holds can be reordered by this wizard.

1. **Click** on Reorder Hold Queue.

   Reorder Hold Queue screen displays.

2. **Scan** in the barcode or **use** the Item Search helper.

3. If a list displays, **highlight** the title and **click** OK.

   Reorder Hold Queue screen displays.

4. To reorder a hold or group of holds, highlight the hold line(s) by clicking the line (drag the cursor down to select multiple lines), **right click** on the item(s) that you wish to move and **select Cut**.
5. **Highlight** the hold line where you wish to insert the hold(s), **right-click**, and select *Insert Row Before* or *Insert Row After*. The information that you cut and inserted should now be reordered within the Hold Queue.

![Reorder Hold Queue Table]

Note: For more detailed information or specific questions, use HELP wizard.
Modify Holds for Item

The Modify Holds for Item wizard guides you through the process of modifying a hold placed on an item.

1. **Click** on Holds Maintenance Group.
2. **Click** on Modify Holds for Item.

   Modify Holds for Item: Item Search screen displays.

3. **Scan** in the barcode or **use** the Item Search helper.
4. If a list displays, **select** your item and **click** OK.

   Modify Holds for Item screen displays.

5. **Click** in the check box next to the item you wish to modify.

   Modify Holds for Item screen displays.

You may **modify** the following information.

- Pickup Library
- Expires (expiration date)
- Date Suspended (suspend hold dates for a period of time)
- Date unsuspended
- Comment (Add, Append, Replace, or Remove comment)

6. **Click** OK
7. **Select** from options:

   ![Options Selection]

   - Get Item Information
   - Modify
   - Modify Another Item's Holds
   - Close

   **Note:** For more detailed information or specific questions, use HELP wizard.
The Remove Item Hold wizard guides you through the process of removing a hold placed on an item.

1. Click on Holds Maintenance Group.
2. Click on Remove Item Hold.

Remove Item Hold screen displays.

3. Scan in the barcode or use the Item Search helper.

4. If a list displays, select your item and Click Remove Holds button.

Remove Item Hold screen displays.

5. Click in the checkbox next to the item you wish to remove.

6. Click Remove Holds button

7. Select from options:

Note: For more detailed information or specific questions, use HELP wizard.
Place Blanket Holds

The Place Blanket Hold wizard is used to place blanket holds on library materials. A blanket hold is a single hold placed on multiple titles or items, and requires a specified number of items be available before the hold is considered filled.

The Place Blanket Hold wizard allows you to select up to 50 items and/or titles for a blanket hold. You must specify a blanket hold expiration date and how many copies must be made available for the blanket hold to be considered filled. You can distribute available copies immediately to patrons instead of waiting until all of the requested copies are available to fill the blanket hold.

1. Click the Holds Maintenance group wizard.
2. Click Place Blanket Hold wizard.

Place Blanket Hold screen displays.

3. Under Blanket Hold Info, complete the following information if needed.

   - In the Blanket Hold ID box, the NEW value displays. If you are creating a new blanket hold, the value must be NEW. You cannot assign your own blanket IDs.
   - In the Copies needed box, type the number of items (1 to 50) that must be available for the blanket hold to be considered filled.
   - In the Pickup At list, select the pickup library. If this field is left blank, the default library is the workstation library of the login used to place the hold or the user's library, depending on property settings.
   - In the Expires box, use the Calendar gadget to select an expiration date for the blanket hold. This field is required.
   - If needed, In the Date Suspended box, use the Calendar gadget to select a beginning date of the blanket hold's suspension. When a hold is suspended, the suspension period begins at 00:01 on the beginning suspension date. In the Date Unsuspended box, use the Calendar gadget to select the ending date of the blanket hold's suspension. When a hold is unsuspended, the suspension period ends at 00:01 on the ending suspension date.
4. In the User ID box, **scan** the user ID or use the lookup user helper.
5. In the Item ID box, **scan** each of the item’s barcodes or use the item lookup helper. Notice that each item for the blanket hold displays in the List of Holds.
6. The Date Suspended and Date Unsuspended fields are only available if the Display Suspension Dates property is selected.
7. Under Level/Range, **select** a Level and Range option.
8. Under Recall Status, **select** a recall type.
9. If the Reserve Hold check box displays, specify whether the hold should be placed against a Reserve Desk item.
10. In the Comments box, add any comments.
11. **Click** Place Blanket Hold.
12. If the blanket hold is successfully placed, you have these options:
   - Place a hold for another user
   - Review holds
   - Place another hold for this user
   - Close the wizard

**NOTE:** If you place a Title level blanket hold on one or more titles, Unicorn selects the first available item of each title to fill the blanket hold. If you want more than one item of a title to fill the blanket hold, place a copy level hold on each item you want. When you place a Copy level hold, the Range options are grayed out since the range setting does not apply for Copy level holds.

**Note:** For more detailed information or specific questions, use HELP wizard.
Trap Holds Wizard

The Trap Holds wizard is used to make holds available that are on the shelf (status Available). These items must then be selected with the List Onshelf Items With Holds report before the Trap Holds wizard can be functional.

Notes: Contact your ITC support to set desired HOLD policies and HOLD maps before using this wizard. On-shelf holds must be enabled. In a multilibrary setting, items needed to satisfy holds at one library may be on the shelf at one or more libraries, policies will determine what items will satisfy the hold.

List Onshelf Items with Holds (Circulation tab) - This report identifies materials with holds that are on the shelf and selects a specific library’s copy to be designated for a specific hold. Report should be scheduled to run daily for the library using Trap Holds wizard.

To trap holds

1. Click the Holds Maintenance group wizard.
2. Click the Trap Holds wizard.
3. Do one of the following.
   a. In the Item ID box, scan the item’s barcode (Trap Holds will occur).
   b. Type the item ID in the Item ID box, and click Trap Holds.
   c. Use the Item Search helper to search for the item. If a list displays, select the item you want, and then click Trap Holds.
   d. If the Current button is available, click the button to select the last item record that was displayed, modified, or added. (Trap Holds will occur).
4. The item is trapped to fill a hold, and is added to the **Items with Trapped Holds** list.

5. Review the **title**, **user**, **routing**, and **destination library information** using the **glossary** links.

6. After the hold has been trapped, select one of the following options:
   a. **Clear List** to clear the Trapped Holds list.
   b. **Close** to exit the wizard.

**Note:** For more detailed information or specific questions, use On-line HELP.
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## Item Maintenance

Section 10

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Helper Buttons which display on Item Maintenance windows.

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Item Maintenance Introduction

Title
A “title” represents a MARC or bibliographic record in the catalog.

Call Number
In Sirsi K12, a call number is created for each school that owns a copy of the title. The call number includes the school and the call number that will be used for all copies added to this call number.

Item
An item is the actual bar-coded item. All copies of a school’s title that have the SAME CALL NUMBER will be added to the same call number.

If an ADDITIONAL COPY IS ADDED WITH A DIFFERENT CALL NUMBER (ex: using PB as prefix), a new call number must be added for that school and call number.

EXAMPLE: Harry Potter and the sorcerer’s stone – 1 bibliographic record
LMHS has 1 copy hardback and 2 copies paperback.
LMFM has 1 copy hardback.
LMIN has 1 copy hardback.
LMLB has 1 copy accelerated reader hardback.
LMSO has 1 copy hardback.

2 call number records for LMHS (PB FIC ROW) 2 copies (FIC ROW) 1 copy
1 call number record for LMF hardback (F ROW) 1 copy
1 call number record for LMIN hardback (FIC ROW) 1 copy
1 call number record for LMLB accelerated reader (AR FIC ROW) 1 copy
1 call number record for LMSO hardback (FIC ROW) 1 copy

Sample Screen for Add Item.

1. Call Number/Item Tab
2. Title
3. Call Numbers at LMHS
4. Copies at LMHS
5. Call Number at LMLB

To Add Item to existing Call Number:
6. Click on Call Number (highlight).
7. Click on Add Item button.
8. Click Save button when finished.

Note: For more detailed information or specific questions, use HELP wizard.

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Add Item

The Add Item wizard is used to add a new item to a library's title. In a multi-library system, each library must have separate call numbers for the copies in its collection. You must have a call number that already exists in your library to use the Add Item wizard to add a copy in your own library.

1. **Click** on Item Maintenance group wizard.
2. **Click** on Add Item Wizard.

   *Add Item* screen displays.

3. **Search** for the title to add an item.

   **NOTE:** If your search finds results, a list of matching records displays in the hit list area. The selected title(s) will display in the lower portion of the window with two tabs, Description and Call Number/Item.

4. **Verify** the information on the Description tab matches the item you are adding.

   **Select** the title to which you want to add a new item, **click** Modify.

   *Add Item* screen displays.

   **NOTE:** If specific title/item displays, move to Step 5.
5. **Click** on the call number and library you want for your item.

6. **Click** Add Item button at the bottom of the screen.

Add Item/Item Information screen displays. The default item information will appear.

7. **Item ID** – you should select one of the following procedures to enter item IDs. Select the one method that works best for your school:

- **Dumb barcodes** – **scan or type** the barcode number. If you scan the barcode, the number will be saved to the record and appear on the left side of the screen. If barcode validation is turned on for your district, you will be able to type the barcode shortcut.

- **Barcode Shortcut** – If you are using this feature, you must have auto-generate barcodes turned off in properties. You will be able to type just the significant digits with an x. However, you will need to keep track of the significant digits.

  Ex. 32612000100069 could be typed as 10006X

- **Auto-generate barcodes** – A new barcode number will automatically be generated. Check with your ITC to request this function be set up for your district. You also must have Auto-generate item ID checked in properties (Right click on the Add Item wizard > select properties > Behavior tab > check Auto–generate item id).
8. **Add or modify** the remaining fields in the *Item Information* and *Extended Information* areas as needed.

- **Type:** Use the Drop Down menu to select the item group.
- **Shelf Location:** Leave to default – Available
- **Material Type:** Use the Drop Down menu to select the material type (this is the icon that will display in the online catalog).
- **Media Desk** – leave blank
- **Total Checkouts** – leave blank – the system generates this number.
- **Copy Number** – system generated – do not change.
- **Item Library** – your library should be there. If a different library appears, you have selected the wrong call number. Click Delete and go back to Step 5.
- **Funding Source** – optional
- **Number of pieces** - indicates the number of pieces associated with a particular copy. If a value of two or more is entered in the number of pieces field, the Circulation wizards will require an override code to check out and check in the item to remind the library staff to check for number of pieces associated with this item.
- **Price** - Enter Price

Permanent – leave checked
Circulate – leave checked
Shadow item – check if you do not want the item to appear in the online catalog.

**Extended Information**

- **Circ Note** – appears when the item is checked in and checked out. Use for comments such as 10 copies in set, CD at desk, etc.
- **Public** – enter any comments you want to appear in the online catalog such as Donated by the Smith Family.
- **Staff** – enter any comments you want to appear only in Workflows such as PO # 1234.

9. **Click** Save to save changes
10. **Select** from options:

   - **Return to Search** – sends you back to search screen – no changes made.
   - **Save** – saves your changes.
   - **Add Item** – lets you add another item to the record.
   - **Delete** – removes the item you just added.
   - **Close** – closes the Add Item wizard.

**Note:** For more detailed information or specific questions, use HELP wizard.
The Edit Item wizard is used to select and modify individual items of a library's title.

1. **Click** the Item Maintenance Wizard Group.
2. **Click** on Edit Item Wizard.

   *Item Search* screen displays.

   **NOTE:** The title you select must have an attached copy to use the Edit Item wizard.

3. **Search** for item or title of the item you want to edit. If a current record exists for the item, **click** the Current information link to access the last record displayed, modified, or added.

   The *Edit Item* screen displays.

   **NOTE:** If your search finds results, a list of matching records displays in the hit list area. The selected title(s) will display in the lower portion of the window with two tabs, **Description** and **Call Number/Item**.

4. **Select** the title containing the item you want to edit. **Click** Modify.

   *Edit Item* screen displays.
5. **Select** the copy you wish to edit.

6. **Add or modify** the fields in the Item information and **Extended Information** areas as needed.

| Item ID – | if changing the item’s barcode number, you can scan a dumb barcode, type a 13 digit barcode, or type the barcode shortcut (significant digits with an X). |
| Type: | Use the Drop Down menu to select the item group. |
| Shelf Location: | Leave to default – Available |
| Material Type: | Use the Drop Down menu to select the material type (this is the icon that will display in the online catalog). |
| Media Desk – | leave blank |
| Total Checkouts – | leave blank – the system generates this number. |
| Copy Number – | system generated – do not change. |
| Item Library – | your library should be there. If a different library appears, you have selected the wrong call number. Click Delete and go back to Step 5. |
| Funding Source – | optional |
| Number of pieces - | indicates the number of pieces associated with a particular copy. If a value of two or more is entered in the number of pieces field, the Circulation wizards will require an override code to check out and check in the item to remind the library staff to check for number of pieces associated with this item. |
| Price - | Enter Price |

Permanent – leave checked
Circulate – leave checked
Shadow item – check if you do not want the item to appear in the online catalog.

**Extended Information**

**Circ Note –** appears when the item is checked in and checked out. Use for comments such as 10 copies in set, CD at desk, etc.
Public – enter any comments you want to appear in the online catalog such as Donated by the Smith Family.

Staff – enter any comments you want to appear only in Workflows such as PO # 1234.

7. **Click** Save to save changes.

8. **Select** from options:

- **Return to Search** – sends you back to search screen – no changes made.
- **Save** – saves your changes.
- **Close** – closes the Add Item wizard.

---

**Note:** For more detailed information or specific questions, use HELP wizard.
Change Item ID

The Change Item ID wizard is used to replace a missing, damaged, or temporary barcode.

1. **Click** on Item Maintenance Group Wizard.
2. **Click** on Change Item ID Wizard.

The *Change Item ID: Item Search* Helper screen displays.

3. **Search** for the record containing your item.
4. **Select** the item in the Call Number/Item window.
5. **Click** Change Item ID button at the bottom of the screen.

Change Item ID screen displays.

6. **Scan or type** the new item barcode number.

**NOTE:** If you don't have a scanner, you can use the barcode shortcut (type the significant digits plus an X).

7. **Click** Modify.

The Complete screen displays.

8. **Click** Change Another Item ID, or **click** close.

**Note:** For more detailed information or specific questions, use HELP wizard.
Mark an Item as Missing

Your staff may decide that an item should be marked as missing if they cannot find the item in the library but the catalog says it is available or if the item is long overdue and you don’t want the item linked to the patron. Checking out the item to MISSIMG user status alerts staff and shadows (hides) the item in the online catalog, preventing futile efforts to locate this item.

1. **Click** on Item Maintenance Wizard group.
2. **Click** on Mark Item Missing Wizard.

Mark Item Missing: 
**Item Search** screen displays.

3. **Search for, scan, or type** in item barcode.
4. If more than one title displays, **select** the desired title. If more than one copy displays, **select** the desired copy.

5. **Click** Mark Item Missing button at the bottom of the screen or Cancel to cancel marking item missing.

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<td></td>
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<td>Don't know much abou... Davis, Kenneth C.</td>
<td>New York : HarperColl...</td>
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<td>First daughters : letter... Gawalt, Gerard W.</td>
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<td>Mr. President book of ... Sullivan, George</td>
<td>New York, N.Y. : Dodd, ...</td>
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<td>Our country's preside... Bausum, Ann.</td>
<td>Washington, D.C. : Nat...</td>
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<td>Power or politics? : fa... Poletta, Nancy.</td>
<td>[Marion, Ill.] : Pieces of...</td>
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<th>License</th>
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<th>Date last charged</th>
<th>Last discharged</th>
<th>Last activity</th>
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<td>$6.96</td>
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<td>8/30/2004</td>
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<td>32612000022008 - 1</td>
<td>NONFICTION - AVAL</td>
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</table>

Marking an Item as Missing When Checked Out to a User

If the item is checked out, the **Mark Item Missing Clear Checkout Override** screen displays.

Options:

a. **Click Override** and Mark Item Missing. (enter your override password) This will remove this item/transaction from the patron record.

b. **Do Not Mark** Item Missing. Use this option if you prefer to make the item lost and keep the item linked to the patron.
Marking an Item as Missing if the Item has Holds

If the item has a hold, the Mark Item Missing: Holds Block Override screen displays.

Options:

a. **Override** and Mark Item Missing. (enter your override password)

b. **Do Not Mark** Item Missing.

**Item is returned after Marked MISSING**

An item that is returned after being marked missing should be checked in with the check in wizard. This will return the item to the status of available.

**Note:** For more detailed information or specific questions, use HELP wizard.
Marking an Item as Lost

A user may tell the library staff that he or she lost an item. Use the Mark Item Lost wizard to mark the item in the catalog as Lost. This will change the item's current status to LOST-CLAIM without checking in the item from the student's record. As you mark an item as Lost, you are given the option of creating a lost item bill, assessing a processing fee, or canceling the lost item bill and processing fee. *If a bill is to be created, it must be done at this step.* When an item is marked as Lost, the system does the following.

- Shadows the item in the catalog so that other users will not inquire about the item.
- Prevents holds from being placed on the lost item.
- Keeps the item on the student's record (as INACTIVE LOAN) until the lost item bill is paid, forgiven, or waived.
- Maintains the current status of LOST-CLAIM until the item returns to circulation.

1. **Click** on Item Maintenance wizard group.
2. **Click** on Mark Item Lost Wizard. *Mark Item Lost: Item Search* screen displays.
3. **Scan or type** the item ID in the entry box or Search for the item using the search item helper.
4. **Click** OK.
5. If a list appears, **select** one of the items in the list.
6. **Click** the Call Number/Item tab to view information.
7. **Select** the correct item to mark lost.
8. **Click** the Mark Item Lost button at the bottom of the screen.

**HINT:** If you know the user who lost the item, it may be faster to display his record to locate the item.
Mark Item Lost Confirmation screen displays.

**Click OK.**

Mark Item Lost: Billing for Lost Item/ Processing Fee screen displays.

9. **Evaluate** the information to make sure the correct user and item are displayed.

10. **Enter or Edit** the amount shown in Billing Information. If a Processing Fee is to be assessed, **type** the amount in the box.

   a. If you want to bill the user for the lost item, **click** Bill User. You will be able to accept payments at a later time using the Pay Bills wizard.

   b. If the user wants to pay the FULL lost item bill immediately, **click** Pay Now. A confirmation screen will display that can also be printed for a receipt.

   c. If the user wants to make a partial payment, **click** Bill User. You’ll need to use the Pay Bills wizard to record the payment when it’s made.

   d. To clear the item from the User’s account and not bill the user, **select** the payment type of “Forgiven” and then **click** the “Pay Now” button.

   e. If you want to waive the lost item bill for the user, while maintaining the user’s responsibility for the lost item, **click** Cancel Lost** Item Bill. Item will remain attached to the patron’s record but no fine/fee will be created.

   **NOTE:** The intent of the “Cancel Lost Item Bill” option in the Mark Item Lost wizard is to provide the staff with a way to NOT bill the user for the lost item, but still keep the lost item associated with the User. You will not be able to delete the item if this option is selected.

   **NOTE:** If you are using the Credit User Account, see Section 6.8 for other payment options.

11. **Click** OK.
Mark Item Lost screen displays,
The item marked lost displays in the List of Items.

12. **Click** Mark Item Lost button to declare another item lost or **click** Close.

**NOTE:** Items may be automatically marked as "Assumed Lost" after a specified time period with the Assumed Lost (Assumedlost) report. This report can be set up to assess a lost item bill and a processing fee according to the library's lost item billing policies, and to prepare lost item billing notices.

**What happens when the user pays the bill for a Lost item?**

When the user pays the bill for the lost item, or the staff member forgives or waives the lost item bill, the item is removed from the user record and retains its LOST_CLAIM or LOST_ASSUM location. The item retains the LOST_CLAIM or LOST_ASSUM location unless the item is found and checked back into the system, renewed, checked out, or put in transit.

**What happens if the item is returned or found before the user pays the lost item bill?**

If the item is returned or found before the user pays the lost item bill, the system displays a message when you check the item in, check it out to another user, renew the item, or put the item in transit. The item's LOST_CLAIM or LOST_ASSUM location is cleared, and the lost item bill is removed from the user record. If a lost item processing fee was assessed at the time the item was marked "Claims Lost" or "Assumed Lost," and if the library's policies are so configured, the fee is automatically removed from the user's bill record as well. The overdue fine for the item is calculated and added to the user record.

**What happens if the item is returned or found after the user pays the lost item bill?**

If the item is returned or found after the user has paid the lost item bill, the system alerts you that the LOST_CLAIM or LOST_ASSUM location was cleared. When you see this message, you know that the item had been marked as Lost, and the lost item bill was paid or waived. You may issue a refund to the user for the paid lost item bill according to your library's procedures. You can find the amount paid in the User's record (Display User > Bills Tab > use drop down menu to select Paid bills or in the Item Record (Item Search > Detailed Display > Call Number and Item Tab > Bills Tab)

**Note:** For more detailed information or specific questions, use HELP wizard.
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Call Number and Item Maintenance

The Call Number and Item Maintenance Wizard guides you through the process of adding/editing a call number and adding/editing an item on an existing bibliographic record.

1. **Click** on Cataloging wizard group.
2. **Click** on Call Number and Item Maintenance Wizard.

3. **Search** for the title that matches your item.

4. If your search yields multiple results, a list of matching records displays in the hit list area. The selected title will display in the lower portion of the window with two tabs, Description and Call Number/Item. **Select** the title you want to review.

5. **Click** on the Call Number/Item tab to review specific item information.

6. When you have selected the call number or item, **click** on the Modify button at the bottom of the screen.

   Once you have selected the record you wish to modify, follow the appropriate directions below to add a call number, add an item, or edit either one.

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**Last Updated July, 2010**

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To Edit an existing call number

1. **Click** on the item number you want to modify.
2. **Make** any changes to the item record. See below for detailed instructions for each field.
3. **Click** on Save at the bottom of the screen.

To Add a New Call Number

**NOTE:** Add a Call Number if:
- there are no items on that record in your library.
- there are items in your library, but they have a different call number than you want for this item.

1. **Click** on the Title.
2. **Click** on Add Call Number button at the bottom of the screen.

Library for New Call Number dialog box displays.

3. **Select** the library from the drop down box for the new call number, and then **click OK**.

4. **Modify** the call number. If there are other items on the record, the system will display one of them. You may keep it as is or change it.

Leave Class scheme as ATDEWEYLOC and do not change the shelving key.

If you check Shadow Call Number, all items connected to that call number will be shadowed (hidden from view in the online catalog.)
To Add a New Item

NOTE: When you add a new call number, continue down the screen to add the item associated with it. You can also add an Item if there is already an item with the call number and library you need on the record.

5. **Modify or Add Item Information**

   a. **Item ID** – you should select one of the following procedures to enter item IDs. Select the one method that works best for your school:

   - Dumb barcodes – **scan or type** the barcode number. If you scan the barcode, the number will be saved to the record and appear on the left side of the screen. If barcode validation is turned on for your district, you will be able to type the barcode shortcut.

   - Barcode Shortcut – If you are using this feature, you must have auto-generate barcodes turned off in properties. You will be able to type just the significant digits with an x. However, you will need to keep track of the significant digits.

     Ex. 32612000100069 could be typed as 10006X

   - Auto-generate barcodes – A new barcode number will automatically be generated. Check with your ITC to request this function be set up for your district. You also must have Auto-generate item ID checked in properties (Right click on the Add Item wizard > select properties > Behavior tab > check Auto-generate item id).
b. Other Item Information fields:

**Type:** Use the Drop Down menu to select the item group.

**Shelf Location:** Leave to default – Available

**Material Type:** Use the Drop Down menu to select the material type (the icon that will display in the online catalog).

**Media Desk** – leave blank

**Total Checkouts** – leave blank – the system generates this number.

**Copy Number** – system generated – do not change.

**Item Library** – your library should be there. If a different library appears, you have selected the wrong call number. Click Delete and go back to Step 5a

**Funding Source** – optional

**Number of pieces** - indicates the number of pieces associated with a particular item. If a value of two or more is entered in the number of pieces field, the Circulation wizards will require an override code to check out and check in the item to remind the library staff to check for number of pieces associated with this item.

**Price** - Enter Price

Permanent – leave checked
Circulate – leave checked
Shadow item – check if you do not want the item to appear in the online catalog.

6. **Extended Information** - if an item has a note in one of these fields, you will see a little post-it on the barcode icon in the result list.

**Circ Note** – appears when the item is checked in and checked out. Use for comments such as 10 copies in set, CD at desk, etc.

**Public** – enter any comments you want to appear in the online catalog such as Donated by the Smith Family.

**Staff** – enter any comments you want to appear only in Workflows such as PO # 1234.
7. **Click** Save to save changes

8. **Select** from options:
   - Return to Search - Return to the search list to look up another title.
   - Add Call Number - Add another call number to the same title.
   - Add Item - Add another item to the call number you just added.
   - Delete an item from this record.
   - Close window.

**NOTE:** Closing the window before saving your changes will prompt you with the following message box. A response of “yes” saves any changes you have made, responding with “no” allows you to delete any modification you have made, and “cancel” allows you to resume modification of the item record.

**Note:** For more detailed information or specific questions, use HELP wizard
Global Item Modify

The Global Item Modify wizard allows the cataloger to select items, and globally apply changes to all item IDs that are scanned.

1. Click on Cataloging Wizard group.
2. Click on Global Item Modify.

Global Item Modify screen displays.

3. Under Item Values to Modify, make any needed changes to the item value fields. **Select** a new policy value from the drop-down list. To reset the item values, click Reset.

4. In the Item ID box, **scan or type** each item’s ID that you wish to modify. Use the Modify Selected Items helper to search by title.

5. The call number, copy, and item ID of the items edited will appear in the window. Change takes place immediately.

6. **Continue** scanning in items to change or select:
   a. Reset – Reverts Item Values to default.
   b. Clear – Removes the item information.
Transfer Titles, Call Numbers, or Items

The Transfer Titles, Call Numbers, or Items wizard is used to transfer one object to another object already in the database.

This wizard performs the following functions:
- Transfer an item to an existing call number on the same record or on a different record.
- Transfer a call number and all of its associated items to a different existing record.
- Transfer all call numbers/items from one existing record to a different existing record.

**Note:** Items in transit or on reserve cannot be transferred.

Transferring an item or call number to a different record

1. **Click** the Cataloging wizard group.
2. **Click** the Transfer Titles, Call Numbers, or Items wizard.
3. **Search** for the source you want to transfer (poor record).
   a. **Click** the Records tab to display the List of titles.
   b. **Click** the Call Number/Item tab to display call number/item information. You may click back and forth on Records and Call Number tabs to locate the correct title, call numbers, or items.
4. On the Records list: (bottom screen)
   a. **Select** the title you want to transfer (poor record).
   b. **Click** Add to Tree button.
   c. The record displays in the Transfer tree pane. (top screen)
   d. **Click** the plus sign to open record tree. (MAC displays ▼)
5. In the Transfer tree pane, **click** on the title, call number, or item you want to transfer, (poor record) and then **click Retain for Transfer** button at the bottom of the screen. More than one item can be transferred at a time. The call number or item line selected will display in italics.

6. In the **Records** list (bottom screen) **click** on the title to which you want to transfer call numbers or items. (good record). You may click back and forth on Records and Call Number tabs to locate the correct title/item.

7. **Click** the Add to Tree button at bottom of the screen. You will now have 2 titles/items in the top screen.

8. In the Transfer tree pane, **select** the destination record (good record).

9. **Click** Transfer button.
10. Depending on how properties are configured, a message may display stating that this operation will remove the title record.
   a. **Click** Yes to proceed with the transfer.
   b. **Click** No to cancel the transfer.

A Transfer Operation Results dialog box displays with information about the transfer status, item number, and server message.

11. **Click** OK to close the dialog box.

   **Unsuccessful:**

   **Successful:**

12. **Click** Close to close the wizard.
Transferring an item to a different call number on the same record

1. **Click** the Cataloging wizard group.
2. **Click** the Transfer Titles, Call Numbers, or Items wizard.
3. **Locate** the record containing the item(s) you want to transfer.

   *In this example, the librarian wants all 6 copies on one call number. She will transfer copies 2-6 to the first copy, and then remove the copy number from the call number.*

4. **Highlight** Title and **click** Add to tree.
5. **Click** on the barcode number of item you want to move.
6. **Click** Retain for transfer.
7. **Repeat** for each item you want to move.
8. **Click on the barcode number** under the destination call number.
9. **Click** Transfer.

   *Transfer Operations Results screen will display.*
10. **Click** OK and Close.

Use the Call Number and Item Maintenance wizard to make additional changes to call number or item information.
Remove Items

The Remove Item wizard guides you through the process of completely removing a title, call number, or item from the database. **Items cannot be removed if they have an open transaction (loan or fine).**

1. **Click** the Cataloging group wizard
2. **Click** the Remove Items wizard
3. **Search** for the title, call number, or copy(s) you want to remove.

**NOTE:** The Call Number / Item tab displays a hierarchical structure (tree view) of the title, call numbers and items. To expand (click a plus sign) (MAC click ▶▼) to collapse (click a minus sign).

4. To delete the title and associated call numbers and items, **select** the check box next to the title you want to delete.
5. To delete the call numbers and associated items, **select** the check box next to the call number record you want to delete.
6. To delete an item, select the check box next to the item(s).
7. If the item is the LAST item on the record, all pieces will be checked to be deleted.
8. **Click** Delete button.

**NOTE:** If this is the last (only) copy attached to the record, a warning that you are about to remove the title will appear.
9. **Click** YES or NO.

**NOTE:** Even if you select to remove all copies, the title and one call number with 0 copies will not be removed if permission has not been granted.
Other options for deleting items

If you delete an item with the Remove Item Wizard, you will not be able to include it in reports. Either of the following methods will allow you to run a report for items with the status of DISCARD so you have a record of items you are removing from your database. Once you are satisfied with the list, contact your ITC to delete all the DISCARD items for you.

Call number and item maintenance

1. **Display** the item record you want to delete.
2. **Change** the item shelf location to DISCARD.
3. A small red S will appear next to the word DISCARD. This indicates that the item is now shadowed in the online catalog.

Global Item Modify

This is a quick and easy method if you are weeding a lot of items at once.

1. **Click** on the Global Item Modify wizard.
2. **Change** Shelf location to DISCARD.
3. **Scan** the items you want to discard.
4. **Contact** your ITC provider to mass-delete the DISCARD items.

Note: For more detailed information or specific questions, use HELP wizard.
The INFOhio Cataloging Method

Ordering records from a vendor (or jobber) might be your first step. Please be sure to include the INFOhio Vendor Specification document with each order. (Spec sheet is 11.7T on manual).

Following the INFOhio recommended cataloging procedure will eliminate the need for original cataloging. You will be looking for bibliographic records that match your item and then adding item specific details to the record. The Tip Sheet (Section 11.8b, #2) may be helpful in determining if a record matches your item.

1. **Check your local database** for a matching record.
   - Use the Call number and Item Maintenance Wizard.
   - Do a title search for your item. Search ALL_LIBS. If you don’t get a hit, then try ISBN or author.
   - If you find a matching record, determine if you need to add a call number or just an item to the record.
     a. Add a Call number if:
        i. there are no items on that record in your library.
        ii. there are items in your library, but they have a different call number than you want for this item.
     b. Add an Item if:
        i. there is already an item with the call number you need in your library.
   - If cataloging equipment or locally produced items (PTA newsletter, yearbook, etc.) follow the directions for using Local Record or Equipment Record templates in Section 11.

2. If you can’t find a matching record in your local database, use **SmartPORT** and select the appropriate database to locate a record.
   - **CRC** – this is the INFOhio catalog of MARC records, updated weekly with records from INFOhio libraries around the state. (Combined the former ABRI, INFO-DEDUP and INFO-MEDIA catalogs) *Use this catalog as your first search choice.*
   - **LC** – Library of Congress – this only contains records of items published in the U.S. Typically, you will find your “older” items here. Use this catalog as a first search, if applicable.
   - **OCLC** – OCLC WorldCat is available via SmartPort and allows unlimited access to the largest selection of MARC records in the world. *Search separately after finding no matches in CRC or LC. Including OCLC Worldcat database in your search, even if not taking any records, is still considered as "use" by OCLC and will drive up INFOhio’s statewide use and costs.* We want to continue being able to offer OCLC Worldcat access in the future, so we hope you understand the importance of first searching for MARC records in the free sources.

   When you find a record that matches your item, import it. Then add your item information.

3. If these resources have failed to produce a matching record, you may wish to **create** a temporary record.
   - Use the **Add Brief Title** wizard from the Item Maintenance wizard group to create a temporary record.
   - Continue to search for a full MARC record to replace the brief record.

4. If you have not found a record yet, you can create a full record using the INFOhio templates for commercially produced materials. Import the appropriate template – the leader will be correctly entered for you. Then continue to catalog your item. Follow directions in Section 12.4.
SmartPort Properties

SmartPort allows dynamic capture and loading of MARC bibliographic and authority records from a Z39.50 server directly into the library's catalog. SmartPort properties should be set the first time the wizard is used.

1. **Click** on Cataloging Wizard Group.
2. **Right-Click** on SmartPort wizard, **select** Properties

**Bibliographic Record Load Options**

3. The **Replace current record** option will confirm that you want to overlay any bibliographic (or authority) record that is displayed, selected, or in memory in the staff client workstation.

   **NOTE:** Caution is recommended when using this option!

4. **Match and load** - will use the match points to determine whether any record in the catalog matches the one that is being captured. If any does, you will be notified before it is displayed to be replaced. **This option is selected by default.**

5. **Match on title control number** - The record is considered a match only if the control number matches a title control number found in one of the Title Control Number Source fields.

6. **Match on Title Control Number OR Indexed MARC Tag** – The record is considered a match if the title control number matches one of the specified Title Control Number Source fields in the imported record, or if one of the standard matching numbers from the incoming record as listed in the Indexed MARC Tag Number field finds a match in an existing SirsiDynix Symphony database index.
7. **Match on Title Control Number AND Indexed MARC Tag** – The record is considered a match if the title control number matches one of the specified Title Control Number Source fields in the imported record, and if at least one of the standard matching numbers from the incoming record as listed in the Indexed MARC Tag Number field finds a match in an existing database index. *This option is selected by default.*

8. **Title control number source (LOWERCASE)** – recommended matches are “oisl” (case-sensitive) – (OCLC number, ISBN number, SSN number, LOC number). Match will occur if OCLC number is present. If no OCLC number is present, load will continue looking for matching ISBN number; etc. If there is not a match, a new record will display to be accepted or modified. *These options are set by default.*

   ![List selected](image)

   **NOTE:** If, at the time of capturing the record, you wish to load it as a new record, insert “k” at the title control number source.

9. **Indexed MARC tag number** – specifies which MARC tags will be used as match points.

   ![List selected](image)

10. **Call sources (UPPERCASE)** specifies the source of call number information. Enter `ATDEWEYLOC,949,,` (case sensitive)

   **NOTE:** This will create the “AUTO-generated” XX call number that is necessary to proceed.

11. **Select** your Library code from the drop down menu, if not displayed.

12. **Format** default is MARC.

13. **Remove subject headings** - Allows you to specify the subject headings that should be removed, based on the 6XX second indicator values. *These headings, rarely needed with K-12 items, are set by default to be removed.*

   ![List selected](image)

14. **Set remaining** properties as displayed (default settings).

   - **Verify options, when selected**, will open these property settings at the point of importing the record, allowing changes to be made if needed.
   - **Strip junktags, when selected**, will remove unnecessary tags (INFOhio determined – can be customized) from the imported record before loading it.

15. **Click** OK.

   **Bibliographic records loaded via SmartPORT will be created as title and call number records.**

   **Use the Call Number and Item Maintenance wizard to edit XX call numbers, add copies.**

   **Note:** For more detailed information or specific questions, use HELP wizard
Connecting to SmartPort

When adding new titles to your library catalog, **be sure to check your own database first.** If there is no existing record there, then use SmartPort to locate one.

1. **Click** on Cataloging Wizard group.
2. **Click** on SmartPort Wizard.
3. **Select** the servers to which you want to connect. Always search **CRC** and/or **LC** before going to OCLC WorldCat!

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<th>Gateway name</th>
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<td>Library of Congress (Free - try before OCLC)</td>
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<tr>
<td>OCLC</td>
<td>WorldCat Subscription (use if no match in CRC/LC)</td>
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<tr>
<td>TEMPL</td>
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- **CRC** – Curriculum Resource Catalog - this is the INFOhio catalog of MARC records, updated weekly with records from INFOhio libraries around the state. (Combined the former ABRI, INFO-DEDUP and INFO-MEDIA catalogs) **Use this catalog as your first search choice.**

- **LC** – Library of Congress – this only contains records of items published in the U.S. Typically, you will find your “older” items here. **Use this catalog as a first search, if applicable.**

- **OCLC** – WorldCat - this database gives you access to the largest selection of MARC records in the world. However, you should only search here separately and as a last resort. INFOhio’s cost for this is based on the number of searches, not the number of exported records.

- **TEMPL** – this database contains only templates for local items, equipment, and original records.

4. **Click** the Connect button at the bottom of the screen. **Search screen displays.**

   **NOTE:** To access the Z39.50 SmartPort targets for importing MARC records, the following IPs and ports need to be open through any firewalls. **If you are having trouble connecting to any of the databases, notify your Networking staff they need to allow outgoing UDP and TCP traffic to these addresses:**

   - **66.114.5.10** Port 3054 to access CRC (INFOhio Records)
   - **140.147.249.38** Port 7090 to access the LC (Library of Congress catalog)
   - **132.174.11.*** Port 210 to access the OCLC WorldCat catalog (OCLC uses a range of IP’s, so must use the *)
   - **66.114.5.10** Port 3094 to access TEMPL (Templates for original cataloging)
SmartPort Helpers and Tips

a. Use the arrows on the helper menu to move through the title list screens of a database. For example, highlight a title in the database you wish to view, click the right arrow, and the next page of titles will display.

b. Show / hide search box – toggles the search box off and on. When it's off, it gives you more screen to view title lists.

c. Show / hide results list. Toggles your hit list off and on.

d. You can use the Change Search Pane View icon to change the search window to a basic or labeled search window (labeled is the default).

e. Change Gateway – allows you to connect or disconnect from a selected database without leaving SmartPort.

f. Sorting Lists - You may sort the columns by clicking on the colored column heading. This only sorts visible titles, not the complete list if it's continued on multiple screens.

g. When you have a title displayed, use the next and previous arrows to navigate through the list of titles. Also note the record number at the top.

h. Checking the Formatted box will give you a descriptive display of the MARC tags. Unchecking the Formatted box, will show the MARC tags.
Obtaining a Record

1. In the Search window Search area, select an Index and type the Search string.
   
   - Start your searching with isbn.
   
   - If no hits, keep searching by title, author, or a combination of title and author.

2. Click:
   
   - Search to display search results.
   
   - Browse to begin browsing a connected server.
   
   - Clear to clear the search terms and start another search.

Search Hit List Window displays.
Search results are grouped by database and are numbered.

3. Select a title and click the display button to review the bibliographic record.

   **NOTE:** You can only display titles from one database at a time. For example, view the records in CRC (INFOhio Catalog). If you don’t like any, close the results window. Click on a title from Library of Congress and display those.

   **TIP! When selecting a record, keep in mind:**

   A record MUST match your item’s:
   
   - Title
   
   - Author
   
   - Physical Description (within a few pages is acceptable)

   Get as close as possible to:
   
   - ISBN
   
   - Publication info – It’s OK if the publishers are part of the same organization (ex. Puffin and Penguin; Scholastic and Levine). Look at the publisher identifier in the ISBN:

   
   978 05450 10221
   
   05450 10225
   
   978 05450 29377
4. When you have found a record that matches your item, **click** the Capture button at the bottom of the screen.

5. **Click** OK to accept the defaults for load options previously set up in Properties or enter new changes here.

**NOTE : Other load options:**

a. If you wish to load the record as a **NEW** record **(not OVERLAY or MATCH)**, remove oisl from the Title Control Number Source and replace it with “k”. The record will load as new with a unique Title Control number. (Use this method when loading SET records, which overlay each other due to “set ISBN”)

b. If you want to **overlay a specific record** in your database, close all wizards in Workflows. Then open the record you wish to replace in Call Number and Item Maintenance before you go to SmartPort. This will ensure that only the record you want overlaid is open. When you locate and capture the record you desire, bullet Replace Current Record.

**Capture screen displays.**

**DO NOT** edit the call number at this time. The Call Number is Auto generated.

6. **Click** the Save button to save this record in your database.

   If you decide NOT to load this record, **click** Close and No to save – record will not be loaded.

7. Record is finished loading when the Save button grays out. **Click** the Close button.

8. You may **either complete** the cataloging for this item (go to Section 11.6c) **or continue exporting** records from SmartPort. Connected servers remain connected until you disconnect them or the server times out.
SmartPort - Completing the Cataloging Process

1. **Click** on Call Number and Item Maintenance Wizard.

2. **Click** on Current title to edit the new record, or search for record, if not current.

   Call Number and Item Maintenance screen displays.

3. **Click the Add Item button** at the bottom of the screen.

4. **Modify** the call number.
   
   a. **Change** Class scheme from AUTO to ATDEWEYLOC.

   Do not change the shelving key.

   If you check Shadow Call Number, all items connected to that call number will be shadowed (hidden from view in the online catalog.)

5. **Add Item Information**
   
   a. **Item ID** – you should select one of the following procedures to enter item IDs. Select the one method that works best for your school:

      - Dumb barcodes –**scan or type** the barcode number. If you scan the barcode, the number will be saved to the record and appear on the left side of the screen. If barcode validation is turned on for your district, you will be able to type the barcode shortcut.

      - Barcode Shortcut – If you are using this feature, you must have auto-generate barcodes turned off in properties. You will be able to type just the significant digits with an x. However, you will need to keep track of the significant digits.

      Ex. 32612000100069 could be typed as 10006X
Auto-generate barcodes – A new barcode number will automatically be generated. Check with your ITC to request this function be set up for your district. You also must have Auto-generate item ID checked in properties (Right click on the Add Item wizard > select properties > Behavior tab > check Auto-generate item id).

b. Other Item Information fields:

Type: Use the Drop Down menu to select the item group.

Shelf Location: Leave to default – Available

Material Type: Use the Drop Down menu to select the material type (this is the icon that will display in the online catalog).

Media Desk – leave blank

Total Checkouts – leave blank – the system generates this number.

Copy Number – system generated – do not change.

Item Library – your library should be there. If a different library appears, you have selected the wrong call number. Click Delete and go back to Step 5a

Funding Source – optional

Number of pieces - indicates the number of pieces associated with a particular copy. If a value of two or more is entered in the number of pieces field, the Circulation wizards will require an override code to check out and check in the item to remind the library staff to check for number of pieces associated with this item.

Price - Enter Price

Permanent – leave checked

Circulate – leave checked

Shadow item – check if you do not want the item to appear in the online catalog.

6. Extended Information

Circ Note – appears when the item is checked in and checked out. Use for comments such as 10 copies in set, CD at desk, etc.

Public – enter any comments you want to appear in the online catalog such as Donated by the Smith Family.

Staff – enter any comments you want to appear only in Workflows such as PO # 1234.
7. Select from options:

- Return to Search - Return to the search list to look up another title in Call Number and Item Maintenance.
- Save – this saves your new record.
- Add Call Number - Add another call number to the same title.
- Add Item - Add another item to the call number you just added.
- Delete an item from this record.
- Close window

8. When finished with this record, click the Close button at the bottom of the screen. You will see the SmartPort screen and can continue searching for new records.

**NOTE:** It is important to close the Call Number and Item Maintenance screen if you will be importing multiple records from SmartPort. This will allow the record you export to be the “current record” in Step 2 above.

Note: For more detailed information or specific questions, use HELP wizard
Add Brief Title

The Add Brief Title wizard guides you through the process of adding a title to the catalog. This is intended for published items that don’t currently have a full MARC record available. It is assumed the librarian will continue looking for a better record. You can easily locate all the brief records you create by doing a General Search for “brief record”.

1. **Click** the Item Maintenance wizard group.

**Set properties**
The first time you use this wizard, you’ll need to set the properties.

2. **Right click** on Add Brief Titles wizard. **Select** Properties.

   a. **Bullet** Never.

   b. Use Drop down menu to **select** “Selected Entries”.

   c. **Type** in the following tag numbers separated by commas: 020,100,245,260,300,989

   d. **OPTIONAL**: **Uncheck** Shadow Title if you want the record to be searchable in CAT.

   e. **Set** defaults to options you use the most. These can be changed if you are cataloging a lot of items with similar characteristics (ie. funding source or item type). You also have the option to make changes when entering specific item information.

   f. **Click** OK to save.

2. **Click** on Add Brief Title wizard.

3. **Enter** Title info:

   a. ISBN – no dashes

   b. Author – last name, first name

   c. Title

   d. Publication info – include location, company, and date

   e. Physical description – include page number

   f. Type “Brief Record” in the 989 field.
4. **Enter** Call number and Copy info.
   a. **Replace** the XX call number.
   b. **Select** your library code and item group from the drop down menus.
   c. **Leave** Shelf location AVAILABLE.
   d. **Enter** item number in your usual manner (scan dumb barcode, barcode shortcut, or auto-generate).
   e. **Select** Material type.
   f. **Select** Funding source if desired.

5. Click the Add Brief Title button. You can then select Add Another Brief Title, Make More Changes, or Close.

The Item is now ready to be circulated.

**NOTE:** Remember, the brief record will need to be replaced with a better record as soon as possible.

   a. Open the **Modify Title wizard**. Do a **General Search** for “Brief Record” to get a list of your brief records.
   b. **Click** Modify to display the record you wish to replace.
   c. **Search** for a better record in SmartPort.
   d. When you Capture the record, **bullet** Replace current record.
   e. A popup screen will show you the call number, author and title. Verify that’s the record you want to replace and **click** the Replace button.
   f. **Click** Save and Close as usual. The new record will be in your database with the item information attached.
   g. Your brief record will still be displaying in Modify Title. You’ll need to **click** Return to search and then **click** Modify to refresh the screen and see the new record.
   h. Use the Delete a Field helper to **remove** the 989 tag.

**Note:** For more detailed information or specific questions, use HELP wizard.
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<td></td>
<td>(commercially produced materials)</td>
</tr>
<tr>
<td>a.</td>
<td>Book</td>
</tr>
<tr>
<td>b.</td>
<td>DVD/Video</td>
</tr>
<tr>
<td>c.</td>
<td>eBook</td>
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<td><strong>Modifying/Enhancing Bib Records</strong></td>
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</tr>
<tr>
<td>b.</td>
<td>Adding 521 Tag - Lexiles</td>
</tr>
<tr>
<td>c.</td>
<td>Adding 526 Tag – Reading Program</td>
</tr>
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<td>d.</td>
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</tr>
<tr>
<td>e.</td>
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Adding a Title Using Template Records - Overview

Template records will allow you to catalog items that do not have a marc record currently available. The records have the leader and tags correctly formatted for you. This will allow them to display correctly and hyperlinked fields will link as they should. They are designed so the librarian can make them as detailed or brief as desired. There are three types of template records:

1. **Original Record Templates** – use these for *commercially published* materials that don’t have records available in any of the SmartPort databases. These will probably be old materials or items from a small publisher.

2. **Local Records** – Use these templates for items that were *created locally*. These are items that have not been published commercially.

   a. **School / Community Book** – for books that were created locally such as books written by students, staff, or community members.
   b. **School Curriculum Guides** – for curriculum guides and course of study items that have been prepared specifically for your district.
   c. **School / Community DVD** – for DVD recordings of school / local activities such as graduation, football games, community parade, or speakers.
   d. **School Literary Magazine** – for compilation of student produced poetry, short stories, essays and art work.
   e. **School Newsletter** – for district or building produced newsletters.
   f. **School Newspaper** – for student produced newspapers and subscription publications.
   g. **School / Community Video** – for video recordings of school / local activities such as graduation, football games, community parade, or speakers.
   h. **School Yearbook** – for yearbooks or other annuals.

3. **Equipment Records** – Use these templates to catalog your equipment.

**NOTE:** *Even though you will be adding a title to your database, you will be using the Modify Title wizard.*

1. The first time you do this, you’ll want to *set* your properties. **Right click** on Modify Title Wizard,. **Click** on Properties.
   - **Bullet** NEVER.
   - **Check** Display descriptive labels.

2. **Use** SmartPORT to **locate** a template record for your item. All templates are in the Template database. If you need directions to use SmartPORT, see Section 11.6 of this manual.

3. **Import** the record to your database.
4. **Click** on the Modify Title Wizard. Your record should be the “current title.”

5. **Follow** the appropriate directions for modifying the template to match your item. Each type of template has specific directions.

   - Be sure to remove any unwanted tags by using the Delete Current Field helper.
   - There should be no XXXs displaying in your completed records.
   - When deleting only parts of a tag, watch the punctuation carefully.
   - Be sure each template you complete has a 989 tag. These will help you locate your records if needed later.

6. **Complete** the cataloging process by adding item and call number information. See Section 11.5 if you need detailed directions.
Local Book Template

1. Use SmartPORT (TEMPLATE database) to **locate** the record. Do a Title Search for “Local School Book Template”.

2. **Import** the record (See manual Section 11.6 if you need specific directions)

3. **Click** on Modify Title Wizard - record should be “current”.

4. **Make** the following changes and additions to the record:

   **Fixed Fields:**
   - **Entrd** -- change to current date in format YYMMDD.
   - **Date1** -- Enter publication year date.

   **Bibliographic Info:**
   - **100** -- DELETE text and enter author’s name, last name first.
   - **245** -- EDIT
     - Delete “Local School Book Template.”
     - Enter Title of book.

   **NOTE:** 2nd indicator contains the number of non-filing characters for the leading article in title. The = 4    An= 3     A = 2    If there is no initial article, leave the zero (0)
   Examples: 245 14 The Nutcracker
             245 10 Dumbo Makes a Splash!
   - **260**  |c Replace “DATE” with date of publication. This should be the same as Date1 above. Example: |c1998.
   - **300** EDIT – Replace XX with page number.
     |c Replace XX with the height in centimeters.
   - **500** Replace XXXX with a note on creator(s) or DELETE.
   - **520** Replace XXXX with a summary or DELETE.
   - **600** Replace XXXX with name of a personal subject (last name first) or DELETE.
650 Replace XXXX with any subjects.
Use Library of Congress to locate correct subject headings.
http://authorities.loc.gov/

651 Replace XXXX with a subject if it's a geographical location or DELETE.

710 EDIT -- Replace XXXX with the name of the school and location if applicable or DELETE.
Example: Pretend Elementary School (Utopia, OH)

710 EDIT -- Replace XXXX with the name of the school district and location.
Example: Utopia Local Schools (Utopia, OH)

989 - DO NOT DELETE!

5. **Click** Save when done.

6. **Click** on the Call Number / Item Maintenance Wizard. **Add** item and call number information to complete the cataloging process. See Manual 11.5 if you need detailed directions.

**Completed Record:**

<table>
<thead>
<tr>
<th>Rec_Type</th>
<th>...</th>
<th>Bib_LVL</th>
<th>m</th>
<th>TypeCtrl</th>
<th>Enc_LVL</th>
<th>u</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desc</td>
<td></td>
<td>Entrd</td>
<td>070112</td>
<td>Det_Dt</td>
<td>Date1</td>
<td>2007</td>
</tr>
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</table>

<p>| Date2   | Ctry | OHU     | Illus | Audience | Notes1 | Notes2 | Notes3 | Notes4 | Notes5 | Notes6 | Notes7 | Notes8 | Notes9 | Notes10 | Notes11 | Notes12 | Notes13 | Notes14 | Notes15 | Notes16 | Notes17 | Notes18 | Notes19 | Notes20 | Notes21 | Notes22 |
|---------|------|---------|-------|----------|---------|-------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|</p>
<table>
<thead>
<tr>
<th>Label</th>
<th>Tag</th>
<th>Ind.</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Date/time stamp</td>
<td>UDC</td>
<td>10308702080943949</td>
<td></td>
</tr>
<tr>
<td>- Local system #</td>
<td>035</td>
<td>UC105-21233935</td>
<td></td>
</tr>
<tr>
<td>- Person Author</td>
<td>100</td>
<td>Baker, Sarah</td>
<td></td>
</tr>
<tr>
<td>- Title</td>
<td>245</td>
<td>Mrs. Baker's class explores Lake Erie.</td>
<td></td>
</tr>
<tr>
<td>- Physical descrip</td>
<td>300</td>
<td>35 p. : ill., col. :c20 cm.</td>
<td></td>
</tr>
<tr>
<td>- General Note</td>
<td>500</td>
<td>Prepared by Mrs. Baker's third grade class.</td>
<td></td>
</tr>
<tr>
<td>- Summary</td>
<td>520</td>
<td>Includes student writings and pictures of their field trip to Kelly's Island the Perry Monument.</td>
<td></td>
</tr>
<tr>
<td>- Personal subject</td>
<td>600</td>
<td>Perry, William</td>
<td></td>
</tr>
<tr>
<td>- Subject term</td>
<td>650</td>
<td>Student publications</td>
<td></td>
</tr>
<tr>
<td>- Subject term</td>
<td>650</td>
<td>Monuments &amp; memorials 1810 -1840</td>
<td></td>
</tr>
<tr>
<td>- Geographic term</td>
<td>651</td>
<td>Lake Erie</td>
<td></td>
</tr>
<tr>
<td>- Added author</td>
<td>710</td>
<td>Pretend Elementary School (Utopia, OH)</td>
<td></td>
</tr>
<tr>
<td>- Added author</td>
<td>710</td>
<td>Utopia Local Schools (Utopia, OH)</td>
<td></td>
</tr>
<tr>
<td>- INFOhio template</td>
<td>985</td>
<td>Local Publication</td>
<td></td>
</tr>
</tbody>
</table>
Curriculum Guide Template

1. Use SmartPORT (TEMPLATE database) to locate the record. Do a Title Search for “Local School Curriculum Guide Template”.

2. Import the record. (See manual Section 11.6 if you need specific directions)

3. Click on Modify Title Wizard - record should be “current”.

4. Make the following changes and additions to the record:

**Fixed Fields:**

- **Entrd**— change to current date in format YYMMDD
- **Date1** – Enter publication date.

**Bibliographic Info:**

- **245**—Delete “Local School Curriculum Guide Template.” Enter Title of guide.

2nd indicator contains number of non-filing characters for leading article in title.

<table>
<thead>
<tr>
<th>Label</th>
<th>Tag</th>
<th>Ind.</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>245</td>
<td>00</td>
<td>LOCAL SCHOOL CURRICULUM GUIDE TEMPLATE</td>
</tr>
<tr>
<td>Publication info</td>
<td>260</td>
<td></td>
<td>cDATE.</td>
</tr>
<tr>
<td>Physical descr</td>
<td>300</td>
<td>XX p.;</td>
<td>bill.;</td>
</tr>
<tr>
<td>General Note</td>
<td>500</td>
<td>Prepared by the district curriculum director.</td>
<td></td>
</tr>
<tr>
<td>Summary</td>
<td>520</td>
<td>Includes content standards, benchmarks, and indicators.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Reviewed on a five year rotation.</td>
<td></td>
</tr>
<tr>
<td>Subject term</td>
<td>650</td>
<td>0</td>
<td>XXX</td>
</tr>
<tr>
<td>Added author</td>
<td>710</td>
<td>2</td>
<td>XXXX</td>
</tr>
<tr>
<td>Internet site</td>
<td>856</td>
<td>2</td>
<td>UCURRICULUM GUIDE URL</td>
</tr>
<tr>
<td>INFOhio template</td>
<td>989</td>
<td>Local Publication</td>
<td></td>
</tr>
</tbody>
</table>

The = 4    An = 3    A = 2    If no initial article, leave the zero ( 0 ).

Examples: 245 04 The Amherst Technology Curriculum
245 00 Social Studies Curriculum Guide

- **260 |c** Enter date of publication. This should be the same as Date1.

- **300** Replace XX with page number.
  |c—Replace XX with height in centimeters.

- **500** Enter note on creators or DELETE.

- **520** EDIT summary if needed, or DELETE.

- **650** EDIT – Replace XXXX with subject area.
710 EDIT -- Replace XXXX with the name of the school and location. Example: Utopia Local Schools (Utopia, OH)

856 Replace “Curriculum Guide URL” with the web address of guide if appropriate or DELETE. Example: |uhttp://www.utopia.org/curriculum

989 Do not delete!

5. Click Save when done.
6. Click on the Call Number / Item Maintenance Wizard. Add item and call number information to complete the cataloging process. See Manual 11.5 if you need detailed directions.

Completed Record:

```

<table>
<thead>
<tr>
<th>Label</th>
<th>Tag</th>
<th>Ind.</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>LocalSystem</td>
<td>080</td>
<td></td>
<td>051260-2215700</td>
</tr>
<tr>
<td>Title</td>
<td>245</td>
<td>00</td>
<td>Social studies curriculum guide.</td>
</tr>
<tr>
<td>Publication info</td>
<td>260</td>
<td></td>
<td>[c2006.</td>
</tr>
<tr>
<td>Physical descrip</td>
<td>300</td>
<td></td>
<td>410 p. : [bill. ; [c25 cm.</td>
</tr>
<tr>
<td>General Note</td>
<td>500</td>
<td></td>
<td>Prepared by the district curriculum director and members of district</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>social studies department.</td>
</tr>
<tr>
<td>Summary</td>
<td>520</td>
<td></td>
<td>Includes content standards, benchmarks, and indicators. Reviewed on a</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>five year rotation.</td>
</tr>
<tr>
<td>Subject term</td>
<td>650</td>
<td>0</td>
<td>Social studies</td>
</tr>
<tr>
<td>Added author</td>
<td>710</td>
<td>2</td>
<td>Utopia Local Schools (Utopia, OH)</td>
</tr>
<tr>
<td>Internet site</td>
<td>856</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>INFOhio template</td>
<td>989</td>
<td></td>
<td>Local Publication</td>
</tr>
</tbody>
</table>
```
**Local DVD Template**

1. **Use** SmartPORT (TEMPLATE database) to **locate** the record. Do a Title Search for “Local School DVD Template”.

2. **Import** the record (See manual Section 11.6 if you need specific directions)

3. **Click** on Modify Title Wizard - record should be “current”.

4. **Make** the following changes and additions to the record:

<table>
<thead>
<tr>
<th>Rec_Type</th>
<th>Bib_Lvl</th>
<th>m</th>
<th>TypeCtrl</th>
<th>Enc_LVL</th>
<th>u</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desc</td>
<td>a</td>
<td>Entrd</td>
<td>070207</td>
<td>Dot_Tp</td>
<td>s</td>
</tr>
<tr>
<td>Date2</td>
<td>Ctry</td>
<td>ohu</td>
<td>Time</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Fixed Fields:

- **Entrd** -- change to current date in format YYMMDD.
- **Date1** -- Enter publication date.
- **007** -- Do not make any changes! Do not delete!

### Bibliographic Info:

- **245** -- EDIT
  - Delete “Local School DVD Template.”
  - Enter Title of DVD.
    - Do not delete [h|videorecording]

**NOTE:** 2nd indicator contains the number of non-filing characters for the leading article in title.

The = 4    An= 3    A = 2    If there is no initial article, leave the zero (0).

Examples:

- 245 04 The Nutcracker
- 245 00 Dumbo Makes a Splash!

- **260** |c EDIT -- Replace “DATE” with date of publication. This should be the same as Date1.

- **300** EDIT - Replace XX with number of minutes.
  - |e Replace XXXX with any accompanying materials or DELETE +|eXXXX.

- **500** Replace XXXX with a note on creator(s) or DELETE.

- **520** Replace XXXX with a summary or DELETE.
5. **Click** Save when done.

6. **Call Number/Item Maint**  
   **Click** on the Call Number / Item Maintenance Wizard. **Add** item and call number information to complete the cataloging process. See Manual 11.5 if you need detailed directions.

**Completed Record:**

```
<table>
<thead>
<tr>
<th>Label</th>
<th>Tag</th>
<th>Ind.</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed field data</td>
<td>007</td>
<td></td>
<td>v0*d</td>
</tr>
<tr>
<td>Local system #</td>
<td>035</td>
<td></td>
<td>UC105-21239617</td>
</tr>
<tr>
<td>Title</td>
<td>245</td>
<td>00</td>
<td>M. E. Kerr visits Utopia Local Schools [videorecording].</td>
</tr>
<tr>
<td>Publication info</td>
<td>260</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Physical desc</td>
<td>300</td>
<td></td>
<td>1 videodisc (75 min.) : [labeled, col.] on 3/4 in.</td>
</tr>
<tr>
<td>General Note</td>
<td>500</td>
<td></td>
<td>Prepared by FHS Television Studio.</td>
</tr>
<tr>
<td>Summary</td>
<td>520</td>
<td></td>
<td>M. E. Kerr speaks with students at Misty Middle School.</td>
</tr>
<tr>
<td>Technical details</td>
<td>530</td>
<td></td>
<td>DVD format</td>
</tr>
<tr>
<td>Issuing body</td>
<td>550</td>
<td></td>
<td>Issued by Utopia Local Schools.</td>
</tr>
<tr>
<td>Personal subject</td>
<td>600</td>
<td>14</td>
<td>Kerr, M. E.</td>
</tr>
<tr>
<td>Subject term</td>
<td>650</td>
<td>0</td>
<td>Authorship anecdotes</td>
</tr>
<tr>
<td>Added author</td>
<td>710</td>
<td>2</td>
<td>Misty Middle School (Utopia, OH)</td>
</tr>
<tr>
<td>Added author</td>
<td>710</td>
<td>2</td>
<td>Utopia Local Schools (Utopia, OH)</td>
</tr>
</tbody>
</table>
```

550 Replace XXXXX with the name of the group who issued or paid for the production or DELETE.

ex. A concert by the show band would be issued by the Music Dept., Booster Club, etc.

600 Replace XXXXX with name of a personal subject (last name first) or DELETE.

650 Replace XXXXX with any subjects or DELETE.

651 Replace XXXXX with a subject if it’s a geographical location or DELETE.

710 EDIT -- Replace XXXXX with the name of the school and location if applicable or DELETE.

Example: Misty Middle School (Utopia, OH)

710 EDIT -- Replace XXXXX with the name of the school **district** and location.

Example: Utopia Local Schools (Utopia, OH)
1. Use SmartPORT (TEMPLATE database) to locate the record. Do a Title Search for “LOCAL SCHOOL LITERARY MAGAZINE TEMPLATE”.

2. Import the record (See manual Section 11.6 if you need specific directions)

3. Click on Modify Title Wizard - record should be “current”.

4. Make the following changes and additions to the record:

**Fixed Fields:**
- **Entrd** -- change to current date in format YYMMDD
- **Dat_Tp** -- change to d if publication has ceased.
- **Date1** -- Beginning publication date, if not known, estimate. Replace the unknown digits with the letter ‘u.’ Ex: 19uu.
- **Date2** -- If publication has ceased change to date of last publication.

**Bibliographic Info:**
- **245 Delete** “LOCAL SCHOOL LITERARY MAGAZINE TEMPLATE.”
  - **Enter** Title of publication.
  - 2nd indicator contains number of non-filing characters for leading article in yearbook title.
    - The = 4    An= 3    A = 2    If no initial article, leave the zero (0)
    - Examples: 245 04 The Amherstonian
    - 245 00 Panorama

- **Use either 260 or 362 tag**
  - **260 |c** Enter date of first publication if known or DELETE the tag.
    - Example: 260 1932- or if publication ceased 260 1932-1990

- **362** If 260 is deleted, enter date of earliest available volume. Delete tag if not needed.
  - Example: 362 1985-

- **300** Edit |c – Replace XX with height in centimeters. Example: |c 27 cm.
5. **Click** Save when done.
6. **Click** on the Vol/Copy tab or Add Volume Wizard. Add item and call number information to complete the cataloging process. See Manual 11.5 if you need detailed directions.

**Completed Record:**

<table>
<thead>
<tr>
<th>Rec_Type</th>
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<th>s</th>
<th>TypeCtrl</th>
<th>Enc_Lvl</th>
<th>u</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desc</td>
<td>a</td>
<td>Enrd</td>
<td>070209</td>
<td>Dat_Tp</td>
<td>c</td>
</tr>
<tr>
<td>Date2</td>
<td>9999</td>
<td>Ctry</td>
<td>ohu</td>
<td>Frequn</td>
<td>l</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Label</th>
<th>Tag</th>
<th>Ind.</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>245</td>
<td>00</td>
<td>Thoughts and reflections.</td>
</tr>
<tr>
<td>Publication info</td>
<td>260</td>
<td></td>
<td>c1982 -</td>
</tr>
<tr>
<td>Physical descrip</td>
<td>300</td>
<td></td>
<td>v. :</td>
</tr>
<tr>
<td>Current frequency</td>
<td>310</td>
<td></td>
<td>Annual</td>
</tr>
<tr>
<td>General Note</td>
<td>500</td>
<td></td>
<td>Prepared by the student literary magazine staff.</td>
</tr>
<tr>
<td>Summary</td>
<td>520</td>
<td></td>
<td>Includes student produced poetry, short stories, essays and art work.</td>
</tr>
<tr>
<td>Issuing body</td>
<td>550</td>
<td></td>
<td>Issued by Fantasy High School.</td>
</tr>
<tr>
<td>Subject term</td>
<td>650</td>
<td>0</td>
<td>Student newspapers and periodicals</td>
</tr>
<tr>
<td>Added author</td>
<td>710</td>
<td>2</td>
<td>Fantasy High School (Utopia, OH)</td>
</tr>
<tr>
<td>Added author</td>
<td>710</td>
<td>2</td>
<td>Utopia Local Schools (Utopia, OH)</td>
</tr>
<tr>
<td>INFOhio template</td>
<td>989</td>
<td></td>
<td>Local Publication</td>
</tr>
</tbody>
</table>
Local School Newsletter Template

1. Use SmartPORT (TEMPLATE database) to locate the record. Do a Title Search for "LOCAL SCHOOL NEWSLETTER TEMPLATE".

2. Import the record (See manual Section 11.6 if you need specific directions)

3. Click on Modify Title Wizard - record should be "current".

4. Make the following changes and additions to the record:

   **Fixed Fields:**
   - **Entrd**—change to current date in format YYMMDD
   - **Dat_Tp**—change to d if publication has ceased.
   - **Date1**—Beginning publication date, if not known, estimate. Replace the unknown digits with the letter 'u.' Ex: 19uu.
   - **Date 2**—If publication has ceased change to date of last publication.

   **Bibliographic Info:**
   - **245 Delete** "LOCAL SCHOOL NEWSLETTER TEMPLATE."
     Enter Title of publication.
     2nd indicator contains number of non-filing characters for leading article in yearbook title.
     The = 4     An= 3     A = 2     If no initial article, leave the zero ( 0 ).
     Examples: 245 04 The Amherstonian
               245 00 Panorama

   - **Use either 260 or 362 tag**
     260 |c Enter date of first publication if known or DELETE the tag.
         Example: |c1932- or if publication ceased |c1932-1990

     362 If 260 is deleted, enter date of earliest available volume. Delete tag if not needed.
     Example: 362 1985-

   - **300 Edit |c** – Replace XX with height in centimeters. Example: |c 27 cm.
5. **Click** Save when done.

6. **Click** on the Vol/Copy tab or Add Volume Wizard. Add item and call number information to complete the cataloging process. See Manual 11.5 if you need detailed directions.

### Completed Record:

<table>
<thead>
<tr>
<th>Label</th>
<th>Tag</th>
<th>Ind</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key</td>
<td>001</td>
<td></td>
<td>105-2123944</td>
</tr>
<tr>
<td>Date/time stamp</td>
<td>005</td>
<td></td>
<td>20070207213712.0</td>
</tr>
<tr>
<td>Local system #</td>
<td>036</td>
<td></td>
<td>UC105-2129398</td>
</tr>
<tr>
<td>Title</td>
<td>245</td>
<td>04</td>
<td>The Dream.</td>
</tr>
<tr>
<td>Publication info</td>
<td>260</td>
<td></td>
<td>[vol1996-].</td>
</tr>
<tr>
<td>Physical desc</td>
<td>300</td>
<td></td>
<td>v. i(vm).i(028 cm.</td>
</tr>
<tr>
<td>Current frequency</td>
<td>310</td>
<td></td>
<td>Monthly (September - May)</td>
</tr>
<tr>
<td>General Note</td>
<td>500</td>
<td></td>
<td>Prepared by Fantasy High School PTA.</td>
</tr>
<tr>
<td>Summary</td>
<td>520</td>
<td></td>
<td>Includes articles and photographs regarding school events and activities</td>
</tr>
<tr>
<td>Issuing body</td>
<td>550</td>
<td></td>
<td>Issued by Utopia Local Schools.</td>
</tr>
<tr>
<td>Subject term</td>
<td>650</td>
<td>0</td>
<td>Newsletters</td>
</tr>
<tr>
<td>Added author</td>
<td>710</td>
<td>2</td>
<td>Fantasy High School (Utopia, OH)</td>
</tr>
<tr>
<td>Added author</td>
<td>710</td>
<td>2</td>
<td>Utopia Local Schools (Utopia, OH)</td>
</tr>
<tr>
<td>Internet site</td>
<td>856</td>
<td>1</td>
<td>[<a href="http://www.utopia.org/fantasy/PTA">http://www.utopia.org/fantasy/PTA</a></td>
</tr>
<tr>
<td>INFOhio template</td>
<td>589</td>
<td></td>
<td>Local Publication</td>
</tr>
</tbody>
</table>
Local School Newspaper Template

1. Use SmartPORT (TEMPLATE database) to **locate** the record. Do a Title Search for “LOCAL SCHOOL NEWSPAPER TEMPLATE”.

2. **Import** the record (See manual Section 11.6 if you need specific directions)

3. **Click** on Modify Title Wizard - record should be “current”.

4. **Make** the following changes and additions to the record:

   **Fixed Fields:**

   - **Entrd** -- change to current date in format YYMMDD
   - **Dat_Tp** -- change to **d** if publication has ceased.
   - **Date1** -- Beginning publication date, if not known, estimate. Replace the unknown digits with the letter 'u.' Ex: 19uu.
   - **Date 2** -- If publication has ceased change to date of last publication.

   **Bibliographic Info:**

   - **245 Delete** “LOCAL SCHOOL NEWSPAPER TEMPLATE.”
     
     **Enter** Title of publication.
     
     2nd indicator contains number of non-filing characters for leading article in yearbook title.
     
     The = 4   An= 3   A = 2   If no initial article, leave the zero (0).
     
     Examples: 245 04  The Amherstonian
               245 00  Panorama

   - **Use either 260 or 362 tag**
     
     **260 |c** Enter date of first publication if known or **DELETE** the tag. This should be the same as Date1.
     
     Example: |c1932-  or if publication ceased |c1932-1990

     **362** If 260 is deleted, enter date of earliest available volume. Delete tag if not needed.
     
     Example: 362 1985-

   - **300 Edit |c** – Replace XX with height in centimeters. Example: |c 27 cm.
5. **Click** Save when done.
6. **Click** on the Vol/Copy tab or Add Volume Wizard. Add item and call number information to complete the cataloging process. See Manual 11.5 if you need detailed directions.

**Completed Record:**

<table>
<thead>
<tr>
<th>Label</th>
<th>Tag</th>
<th>Ind.</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>key</td>
<td>001</td>
<td></td>
<td>105-2123946</td>
</tr>
<tr>
<td>Date/time stamp</td>
<td>005</td>
<td>2007020713210.0</td>
<td></td>
</tr>
<tr>
<td>Local system #</td>
<td>035</td>
<td>UC105-2123940</td>
<td></td>
</tr>
<tr>
<td>Title</td>
<td>245</td>
<td>00</td>
<td>Thoughts and reflections.</td>
</tr>
<tr>
<td>Publication info</td>
<td>260</td>
<td>01982 -</td>
<td></td>
</tr>
<tr>
<td>Physical descrip</td>
<td>300</td>
<td>v. : [bill.]:127 cm.</td>
<td></td>
</tr>
<tr>
<td>Current frequency</td>
<td>310</td>
<td>Annual</td>
<td></td>
</tr>
<tr>
<td>General note</td>
<td>500</td>
<td>Prepared by the student literary magazine staff.</td>
<td></td>
</tr>
<tr>
<td>Summary</td>
<td>520</td>
<td></td>
<td>Includes student produced poetry, short stories, essays and art work.</td>
</tr>
<tr>
<td>Issuing body</td>
<td>550</td>
<td>Issued by Fantasy High School.</td>
<td></td>
</tr>
<tr>
<td>Subject term</td>
<td>650</td>
<td>0</td>
<td>Student newspapers and periodicals</td>
</tr>
<tr>
<td>Added author</td>
<td>710</td>
<td>2</td>
<td>Fantasy High School (Utopia, OH)</td>
</tr>
<tr>
<td>Added author</td>
<td>710</td>
<td>2</td>
<td>Utopia Local Schools (Utopia, OH)</td>
</tr>
<tr>
<td>INFOhio template</td>
<td>909</td>
<td>Local Publication</td>
<td></td>
</tr>
</tbody>
</table>
Local Videocassette Template

1. Use SmartPORT (TEMPLATE database) to locate the record. Do a Title Search for “Local School Videocassette Template”.

2. Import the record (See manual Section 11.6 if you need specific directions)

3. **Click** on Modify Title Wizard - record should be “current”.

4. Make the following changes and additions to the record:

   **Fixed Fields:**
   - **Entrd** -- change to current date in format YYMMDD.
   - **Date1** -- Enter publication date.
   - **007** -- Do not make any changes! Do not delete!

   **Bibliographic Info:**
   - **245** -- EDIT
     - Delete “Local School Videocassette Template.”
     - Enter Title of video.
     - Do not delete
       - [h]videorecording

   **NOTE:** 2nd indicator contains the number of non-filing characters for the leading article in title.
   
   The = 4  An= 3  A = 2  If there is no initial article, leave the zero (0).
   Examples: 245 04  The Nutcracker
             245 00  Dumbo Makes a Splash!

   - **260** |c EDIT -- Replace “DATE” with date of publication. This should be the same as Date1.

   - **300** EDIT – Replace XX with number of minutes.
     |e Replace XXXX with any accompanying materials or DELETE +|eXXXX.

   - **500** Replace XXXX with a note on creator(s) or DELETE.
520 Replace XXXX with a summary or DELETE.

600 Replace XXXX with name of a personal subject (last name first) or DELETE.

650 Replace XXXX with any subjects or DELETE.

Use Library of Congress to locate correct subject headings.
http://authorities.loc.gov/

651 Replace XXXX with a subject if it's a geographical location or DELETE.

710 EDIT -- Replace XXXX with the name of the school and location if applicable or DELETE.
Example: Misty Middle School (Utopia, OH)

710 EDIT -- Replace XXXX with the name of the school district and location.
Example: Utopia Local Schools (Utopia, OH)

989 – Do not delete!

5. **Click** Save when done.

6. **Call Number/Item Maint** Click on the Call Number / Item Maintenance Wizard. **Add** item and call number information to complete the cataloging process. See Manual 11.5 if you need detailed instructions.

**Completed Record:**

<table>
<thead>
<tr>
<th>Rec_Type</th>
<th>0</th>
<th>Bib_Lvl</th>
<th>m</th>
<th>TypeCtrl</th>
<th>Enc_LVL</th>
<th>u</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desc</td>
<td>a</td>
<td>Engrd</td>
<td>070112</td>
<td>Dat_TP</td>
<td>Date_1</td>
<td>2006</td>
</tr>
<tr>
<td>Dbs2</td>
<td>Ctrr</td>
<td>ohu</td>
<td>Time</td>
<td>III</td>
<td>Audience</td>
<td></td>
</tr>
<tr>
<td>Accomp</td>
<td>GovtPub</td>
<td>ConPub</td>
<td>Type_Mat</td>
<td>v</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Label** | **Tag** | **Contents**
---|---|---
Key | 001 | 105-2123942
Date/time stamp | 005 | 20070200074256.0
Fixed field data | 007 | \(v^*b|b|1o\)
Local system # | 035 | UC105-2123936
Title | 245 00 | Fantasy High School graduation, June 3, 2006 [videorecording].
Publication info | 260 | [c]2006
Physical description | 300 | 1 videocassette (120 min.): [b&w, col.; 1/2 in. +] program booklet.
General note | 500 | Prepared by Fantasy High School Video Club.
Summary | 520 | Records the ceremony, speeches, and diploma distribution to 350 graduates of Class of 2006; Seminar John Jones gave the commencement address.
Technical details | 530 | VHS format
Personal subject | 14 | Jones, John
Subject term | 0 | Commencement ceremonies
Added author | 710 2 | Fantasy High School (Utopia, OH)
Added author | 710 2 | Utopia Local Schools (Utopia, OH)
INFOhio template | 989 | Local Publication
School Yearbook Template Record

1. Use SmartPORT (TEMPLATE database) to locate the record. Do a Title Search for “LOCAL SCHOOL YEARBOOK TEMPLATE”.

2. Export the record (See manual Section 11.6 if you need specific directions)

3. Click on Modify Title Wizard - record should be “current”.

4. Make the following changes and additions to the record:

**Fixed Fields:**

- **Entrd**– change to current date in format YYMMDD
- **Dat_Tp**- change to d if publication has ceased.
- **Date1**-- Beginning publication date, if not known, estimate. Replace the unknown digits with the letter ‘u.’ Ex: 19uu.
- **Date2**-- If publication has ceased change to date of last publication.

**Bibliographic Info:**

- **245** Delete “LOCAL SCHOOL YEARBOOK TEMPLATE.”
  Enter Title of yearbook.
  2nd indicator contains number of non-filing characters for leading article in yearbook title.
  The = 4 A= 3 If no initial article, leave the zero ( 0 ).
  Examples: 245 04 The Amherstonian 245 00 Panorama

- **Use either 260 or 362 tag**

  260 |c Enter date of first publication if known or DELETE the tag. This should be the same as Date1.
  Example: |c1932- or if publication ceased |c1932-1990

  362 If 260 is deleted, enter date of earliest available volume. Delete tag if not needed.
  Example: 362 1985-

  300 Edit |c – Replace XX with height in centimeters. Example: |c 28 cm.
500 Edit if desired.

520 Edit if desired.

550 Replace XXXX with the name of the school.

710 Replace XXXX with the name of the school and location (if applicable).

710 Replace XXXX with the name of the school district and location.

989 DO NOT DELETE!

5. **Click** Save when done.

6. **Click** on the Vol/Copy tab or Add Volume Wizard. Add item and call number information to complete the cataloging process. See Manual 11.5 if you need detailed directions.

**Completed Record:**

<table>
<thead>
<tr>
<th>Rec_Type</th>
<th>Bib_Lvl</th>
<th>TypeCtrl</th>
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</tr>
</thead>
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<tr>
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<td>Entd</td>
<td>970212</td>
<td>Dat_Ty</td>
<td>Date1</td>
</tr>
<tr>
<td>Dcnt2</td>
<td>9999</td>
<td>Ctry</td>
<td>abu</td>
<td>Freqn</td>
</tr>
<tr>
<td>SDS</td>
<td>Ser_Type</td>
<td>m</td>
<td>Phys_Med</td>
<td>Repr</td>
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</table>

<table>
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<tr>
<th>Label</th>
<th>Tag</th>
<th>Ind.</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
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<td>105-2116382</td>
</tr>
<tr>
<td>Date/time stamp</td>
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<td></td>
<td>20070207210724.0</td>
</tr>
<tr>
<td>Title</td>
<td>245</td>
<td>04</td>
<td>The Unicorn.</td>
</tr>
<tr>
<td>Publication info</td>
<td>260</td>
<td></td>
<td>[c1948 -</td>
</tr>
<tr>
<td>Physical descrip</td>
<td>300</td>
<td></td>
<td>v.: [ill., part.]; [c27 cm.</td>
</tr>
<tr>
<td>Current frequency</td>
<td>310</td>
<td></td>
<td>Annual</td>
</tr>
<tr>
<td>General Note</td>
<td>500</td>
<td></td>
<td>Prepared by the student yearbook staff.</td>
</tr>
<tr>
<td>Summary</td>
<td>520</td>
<td></td>
<td>Includes student and staff pictures; photos of teams, clubs, and events.</td>
</tr>
<tr>
<td>Issuing body</td>
<td>550</td>
<td></td>
<td>Issued by Utopia Local Schools.</td>
</tr>
<tr>
<td>Subject term</td>
<td>650</td>
<td>0</td>
<td>School yearbooks</td>
</tr>
<tr>
<td>Added author</td>
<td>710</td>
<td>2</td>
<td>Fantasy High School (Utopia, OH)</td>
</tr>
<tr>
<td>Added author</td>
<td>710</td>
<td>2</td>
<td>Utopia Local Schools (Utopia, OH)</td>
</tr>
<tr>
<td>INFOhio template</td>
<td>969</td>
<td></td>
<td>Local Publication</td>
</tr>
</tbody>
</table>
Equipment Templates

General points to keep in mind:

• You will be creating one record for each piece of equipment. This is different from cataloging other items. Normally you would put multiple copies of a title on the same record. However, if you have 5 identical overheads, you will need 5 records. This will make your record keeping much simpler in the long run.

• The templates have been designed to be used with specific types of equipment. Using the appropriate template will reduce the amount of information to be added. For example, the TV and DVD player templates include remotes on the record.

• The templates are designed to be as detailed or brief as desired. All the fields on the record do not need to be used. Any unwanted fields should be deleted with the Delete Field helper.

• All fields on this record are searchable in Sirsi by doing a General Search.

• The Fixed Fields (leader) are already formatted for you. You only need to adjust the date.

• The first three fields on the record, 024, 037, and 092 are numbers specific to each item in addition to the barcode number. This will make it easy to locate them.

• Use the 500 tag for any additional notes, description, etc. This is a good place to list included pieces – remotes, cables, etc. This field is searchable, but not hyperlinked.

• Any information you put in the 690 – local subject – is hyperlinked. There is a 690 tag on each template labeled XXXXXXXXXX. Use this to add any information you want to be searchable and hyperlinked – ex. Permanent location, repaired 2003, vendor name, etc.

• When deleting text, be careful that you leave any punctuation in place.

• If you have not done so already, set your properties to display descriptive labels. Right click on Modify Title > Click on Properties > Check Display descriptive labels.

NOTE: If you have some equipment that you can’t find a template for, you can adapt a similar one. For example, use the Television/VCR combination template for a TV/DVD/VCR unit – just add DVD to it and make modifications as needed. Another option is to use the Generic Template:

• Search for Generic xxxx
• 092 – replace GEN with an appropriate call number
• 245 – delete GENERIC TEMPLATE and add appropriate title for item
• Follow directions below for the remainder of the fields.
Creating an Equipment Record

1. Use SmartPORT, TEMPLATE database, to **locate** a template record for your item. Do a Title Search for the type of equipment and 4 X’s. ex. Overhead XXXX
   If you want to see all templates search: equipment XXXX

2. **Import** the record (See manual Section 11.6 if you need specific directions).

3. **Click** on Modify Title Wizard. The record should be “current title”.

4. If you do not want your record to display in CAT, **check** Shadow Title.

5. **Make** the following changes:

   **Fixed fields:**
   - Entrd-- change to current date in format YYMMDD
   - Stock number
   - Local Dewey call num
   - Title
   - Publication info
   - General Note
   - General Note
   - General Note
   - General Note
   - Technical details
   - Local subject
   - Local subject
   - Local subject
   - Local subject
   - Local subject
   - Local subject
   - INFOhio template

   **Bibliographic Info:**
   - 024 Replace XXXX with serial no.
   - 037 Replace XXXX with local number (school inventory, insurance number)
   - 092 Leave the letters in the field. You will use them as a prefix for the call number. Replace the XXXX with the unique part of your call number.
   - 245 Replace XXXX with the model number. Delete “BRAND” and replace with the brand name.
   - 260 Replace the words with the appropriate information. Leave punctuation in place. Ex. Austin, TX :|b 3M Visual Systems Division, |c 2003.
   - 500 Enter any notes or delete the field.
   - 538 Enter specifications or delete.
Add a Title Using Template Records

Equipment Template

- **690** Replace XXXX with appropriate information or delete the field.
- **690** Repair: Fyxxxx – leave this field as is so it can be used in the future to enter repair year if desired. Repair specifics should be entered in the 500 tag or item staff note.
- **989** Do not make any changes! **DO NOT DELETE!**

6. **Click** Save and Close.

### Adding Item information for Equipment

1. **Click** the Call number and Item Maintenance wizard. Your record will be the current title.  
(See Manual section 11.5 if you need help.)

2. **Enter** the call number from the 092 tag. Using the recommended prefix will make it easy for you to do a call number browse or sort a shelflist by call number and have all similar items display together.

3. **Click** Save.

4. **Click** Add Item.

5. **Enter** the item information.

6. **Click** Save and Close.

**HINTS:**

- The Circ note will display at checkout and checkin in Java. You can enter things you want to check at those times such as “includes remote”, “cable at desk”, etc.
- If the item has peripherals, be sure to adjust the number of pieces.
- Use Staff Note to keep repair history.
Sample of completed equipment record:

<table>
<thead>
<tr>
<th>Label</th>
<th>Tag</th>
<th>Ind.</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>245</td>
<td>00</td>
<td>Laptop computer ( \text{equipment} ): ( \text{Model} ) Inspiron E1505 / ( \text{Vendor} ) Dell.</td>
</tr>
<tr>
<td>Publication info</td>
<td>260</td>
<td></td>
<td>Austin, TX : ( \text{Vendor} ) Dell, ( \text{Year} ) 2006.</td>
</tr>
<tr>
<td>General Note</td>
<td>500</td>
<td></td>
<td>CPU specifications: RAM 512MB ; HD 120GB ; drives/burners 24X CD Burner/DVD Combo Drive ; processor Intel Core Duo ; speed 2.16GHz ; operating system Windows Vista.</td>
</tr>
<tr>
<td>General Note</td>
<td>500</td>
<td></td>
<td>Wireless</td>
</tr>
<tr>
<td>General Note</td>
<td>500</td>
<td></td>
<td>Purchased with PTA funds 1/07 $899</td>
</tr>
<tr>
<td>Technical details</td>
<td>530</td>
<td>0</td>
<td>Network: MAC address 00:30:6E:CF:EE:CC</td>
</tr>
<tr>
<td>Local subject</td>
<td>690</td>
<td>0</td>
<td>Audio-visual equipment</td>
</tr>
<tr>
<td>Local subject</td>
<td>690</td>
<td>556</td>
<td>Battery: 53 WHR 6-cell Lithium Ion</td>
</tr>
<tr>
<td>Local subject</td>
<td>690</td>
<td>556</td>
<td>Fiscal year: FY2007</td>
</tr>
<tr>
<td>Local subject</td>
<td>690</td>
<td>556</td>
<td>Purchase order: #1357</td>
</tr>
<tr>
<td>Local subject</td>
<td>690</td>
<td>556</td>
<td>Repair: FYxxxx</td>
</tr>
<tr>
<td>Local subject</td>
<td>690</td>
<td>556</td>
<td>Circulating computers</td>
</tr>
<tr>
<td>INFOhio template</td>
<td>989</td>
<td></td>
<td>Equipment Record</td>
</tr>
</tbody>
</table>

**Item information**

- **Item ID:** 30401001000672
- **Copy number:** 1
- **Type:** EQUIPMENT
- **Item library:** LEHS
- **Shelf location:** AVAILABLE
- **Current status:** AVAILABLE
- **Material type:** EQUIPMENT
- **Funding source:** PTO/PTA
- **Media desk:** EQUIPMENT
- **Number of pieces:** 2
- **Total checkouts:** 0
- **Price:** $899.00
- **Permanen:** Circulate
- **Shadow item:**

**Extended information**

<table>
<thead>
<tr>
<th>Tag</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>CIRCNOTE</td>
<td>includes power cord</td>
</tr>
<tr>
<td>PUBLIC</td>
<td></td>
</tr>
<tr>
<td>STAFF</td>
<td></td>
</tr>
</tbody>
</table>
Adding multiple pieces of identical equipment

Scenario: You have 10 identical overhead projectors to catalog.

HINT: When cataloging multiple pieces of equipment, set your properties first. Right click on Duplicate Title > click on Properties.
   a. Make Type: Equipment.
   b. Make Item Category 1: Equipment.
   c. Set price and/or funding source if appropriate.

1. Complete the cataloging process for the first item.
2. Duplicate Title Click on the Duplicate Title Wizard
3. Locate for the record you just completed. Click Duplicate.
   a. Change the serial number in the 024 tag.
   b. Change the local ID number in the 037 tag.
   c. Change the call number in the 092 tag.
   d. Make any other changes needed in the bib record. Click Save when done.
4. “You need to provide a new item ID” message will appear. Click OK.
5. Complete the item information screen.
6. Click Save.
7. Click on the XX call number and modify it.
8. Click Return to Search.
9. Repeat steps 3 – 8 until all overheads have been cataloged. You should have 10 bib records with one item on each.
Original Record Templates

This template is to be used for commercially produced materials. Use it if:
- You are unable to locate a record in any of the SmartPort databases.
- The Add Brief Title record is too brief for this item.

NOTE: If you find a record for the original published edition, then reprints, paperback, or rebound editions by Scholastic, Turtleback, Bound to Stay Bound, Aladdin, Puffin and similar companies may be added to that record. You need to examine the verso (back of title page) carefully for that information. A new record is not required if the content and format have not changed. New bindings and/or reprints do not require new records. If the new edition includes changed or added content then a new record is required. If you are unsure, create a new record.

1. **Export** the template using SmartPort.
   a. **Select** the TEMPL (template) database.
   b. **Search** for the template using General for the search index and ORIGINAL RECORD for the search term.
   c. **Select** the appropriate template for your item.
   d. **Capture and save** as you would any other record.

   **NOTE:** It is recommended that templates be downloaded as needed, as they may be updated from time to time by INFOhio and they could become corrupted if left to reside in a local catalog.

2. **Select** the Modify Title Wizard. If you haven’t done so already, change the properties (right click on the Modify Title wizard).
   - **Bullet** Descriptive View.
   - **Check** Display descriptive labels.

3. **Display** your template. The template you exported will be the Current Title.

When completing the template, keep in mind:

- Fields in **Bold and starred** (*245) should be completed if the information is available.

- Records can be as detailed or as simple as you desire. If you do not want a tag or field, use the delete a field helper to remove it. (Put your cursor in the unwanted box and click the delete helper.) Be sure to delete **ALL** tags and fields you do not want. A completed record should not have any XXXXs in it.

- If you do not want some of the subfields in a tag, you must remove the punctuation preceding it, the pipe, subfield letter, and it’s text.
You may find it helpful to use any or all of the tip sheets in this section of the Sirsi manual. They are color coded making it easier to spot punctuation and mandatory fields.

If these directions are followed carefully, title, author, subject and series fields will hyperlink correctly.

**Fixed Fields**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date entered on file (Entrd):</td>
<td>This date must be replaced with the current date. Enter as YYMMDD</td>
</tr>
<tr>
<td>Date 1:</td>
<td>Enter publication date.</td>
</tr>
<tr>
<td>*001 – Do nothing!</td>
<td></td>
</tr>
<tr>
<td>*005 – Do nothing!</td>
<td></td>
</tr>
<tr>
<td>*007 – Do nothing!</td>
<td></td>
</tr>
<tr>
<td>*010 – LCCN – Library of Congress Control number</td>
<td>Delete “LCCN” and replace with the number if appropriate or else delete the tag.</td>
</tr>
<tr>
<td>*020 – ISBN</td>
<td>Delete “ISBN” and replace with the 10 or 13 digit number. Do not use dashes or spaces. If your item does not have an ISBN, delete the tag.</td>
</tr>
</tbody>
</table>

**Edit** the remainder of the tags as appropriate for your item.
**040 – CATALOGING SOURCE**
Delete “SCHOOL LC CODE” and replace with your school’s Library of Congress (LC/NUC) code. Remember, it is case sensitive. If you don’t know your school’s code, please look it up here: http://www.infohio.org/UC/LOCcodesRev.html

Example: 040 OLmIUC

**100 – PERSONAL AUTHOR**
Use this tag if your item was written by a single person. If the work is a compilation of several authors, (ie. a video or encyclopedia), delete this tag and enter their names in the 700 tag. Delete “LAST NAME, FIRST NAME” and replace with the author’s name in that format.

If you know the author’s birth / death dates delete “DATES” and enter them.
If you do not know the author’s birth / death dates, delete “|dDATES”

Example: 100 1 Mitchell, Margaret, |d1900-1949.

**245 – TITLE**

Delete “_____ TEMPLATE” and replace with the item’s title as it appears on the title page.

Delete “REMAINDER OF TITLE” and replace with remainder of the title or delete “:|REMAINDER OF TITLE”

Delete “STATEMENT OF RESPONSIBILITY” and replace with the author, illustrator, translator, editor, etc. Enter name as it appears on the title page. Or delete “/|c STATEMENT OF RESPONSIBILITY.”

Example: 245 10 Charlotte's web /|cby E.B. White ; pictures by Garth Williams.
245 00 Charlotte’s web |h[videorecording] / |ca Hanna-Barbera production.

Example: 245 10 Private eyeballs.

Example: 245 14 The history puzzle ;|bhow we know what we know about the past

Example: 245 10 Charlotte's web /|cby E.B. White ; pictures by Garth Williams.
246 – Variant title
This is most commonly used for items that have numbers or abbreviations in the title and is needed so either format will yield results in a search. If the title of your item has variations, delete “VARYING FORM OF THE TITLE” and replace with the alternate title. If there is no variant title, delete the tag.
Example:
245 One Hundred and One Dalmations
246 101 Dalmations

250 – Edition Statement
Delete “EDITION STATEMENT” and replace with the edition (usually found on the title page). If there is no edition statement, delete the tag.
Example: 250 1st ed.

*260 – PUBLICATION INFORMATION
Delete “LOCATION” and replace with the place of publication
Delete “PUBLISHER” and replace with the name of the publisher or distributor
Delete “PUBLICATION DATE” and replace with publication or distribution date.
NOTE: This MUST match the date entered in the leader in the Date1 field.
If there is no date of publication but a copyright date is available, you may use the copyright date preceded by the letter ‘c’ to identify it as a copyright date.

*300 – PHYSICAL DESCRIPTION
Your template will have the basic fields for your item type. Replace any XXXXs with the appropriate information. If you do not want some of the subfields in this tag, you must remove the punctuation preceding it, the pipe, subfield letter, and it’s text.
Examples:
Book - 300 32 p. :|bill. ;|c23 cm. +|eteacher’s guide.
DVD - 300 2 videodiscs (178 min.) :|bsd., col. ;|c4 3/4 in.
Video – 300 1 videocassette (26 min.)

440 – Series Title
If your item is part of a series, delete “SERIES TITLE” and replace with the title of series. If there is a volume or number, delete “VOLUME OR NUMBER” and replace with the appropriate information. It is important that the number be in |v so the series title will be searchable. If the item is not part of a series, delete the tag.
Example: 440 Goosebumps;|v7
500 – General Note

This tag is for information you want on the record, but there isn’t a designated field for it. **Delete** the XXXXs and **replace** with your information. If you don’t want a general note, delete the tag.

Examples:
- 500 Title taken from cover.
- 500 Includes index.
- 500 Translated from German
- 500 Based on a play which originally appeared in France as "Un peu plus tard, un peu plus tôt."
- 500 Three-dimensional film: Natural vision.

504 – Bibliography Note

If your item contains a bibliography, **delete** the XXs and **replace** with the page numbers of the bibliography. If there is no bibliography, delete the tag.

Example: 504 Includes bibliographic references (p. 320-324) and index.

505 – Contents Note

This field is used to list titles contained in your item (list of short story titles, titles on one video, etc.) Information in a 505 tag will come up in a title search. **Select** the one format that best fits your item and **delete** the other 505 tags. In all formats, titles are separated by space, dash, dash, space.

**NOTE:** If you want to include authors as in the 2nd example below, they will not be searchable by author. You must enter the author’s name in a 700 tag to search by author.

Examples:
- 505 The trappings of power -- Upon reflection -- Pot luck -- A time to dance.
- 505 On my way to school / by Jim Smith -- It happened one time at lunch / by Angela Dime -- The day it snowed / by Laura Wilson.
- 505 v. 1. 1900-1945 -- v. 2. 1945-1996.

If your item doesn’t contain more than one title, **delete** the all three 505 tags.

508 – Credits (nonprint materials only)

This field is for the creators of the item – producers, writers, directors, cinematographers, etc. These are searchable by an author search. You can add as many entries as you wish in one tag. Each entry should be formatted:

Job comma first name last name space semicolon space (period after last entry.)

Examples:
- 508 Editor, Aaron Jones ; music, Paul Andrews ; writer, Sue Hosler.
- 508 special dinosaur effects, Michael Lantieri ; music, John Williams ; editor, Michael Kahn.

511 – Performer(s) (nonprint materials only)

This field is to give credit to actors, singers, narrators, etc. These are searchable by an author search. List as many names as you wish separated by commas and a space. Follow last entry with a period.
Examples:

511  Sam Neill, Laura Dern, Jeff Goldblum, Richard Attenborough.
511  Anne Baxter (Louise), Maria Perschy (Angela), Gustavo Rojo (Bill), Reginald Gilliam (Mr. Johnson).
511  Hosted by Hugh Downs.

520 – Summary
Delete the text on template and replace with a summary of the contents. If you don’t want a summary, delete the tag.

Example:

520  When the Chamber of Secrets is opened again at the Hogwarts School for Witchcraft and Wizardry, second-year student Harry Potter finds himself in danger from a dark power that has once more been released on the school.

521 – Audience
Delete the text on the template and replace with intended audience.

Examples:

521  Elementary.
521  gr. 7-9.

* 538 – Technical Details (nonprint items only)
This is for the format of your item and is required for nonprint items. Do not delete!

Examples: 538  DVD
538  VHS

*6XX Subject
You should include at least one subject in your record to facilitate searching in the online catalog. You may include as many as you wish. Determine if your item is about a person, place, or something else and then select the appropriate tag(s) below to enter the subject(s). If you wish to add more subjects, put your cursor in the 6XX tag and click the Add a Field helper. Delete any unused 6XX tags.

*600 – Personal Subject
If your item is about a person, delete the text, and replace with the name (last name first). If your item is not about a person, delete the 600 tag.

Example: 600  Lincoln, Abraham

*650 – Subject Term
If your subject is anything other than a person or place, delete all the text in the 650 field and replace with a subject term. For the best searching results in the online catalog, we recommend using Library of Congress Authority Headings and copy/pasting the subjects from there into your template. You can also copy subjects from similar items in your own catalog. If you want more than one subject term, put your cursor in the 650 tag and click the Add a Field helper. You can add as many subjects as you need.
To access Library of Congress, go to [http://authorities.loc.gov](http://authorities.loc.gov) Click on Search Authorities. Enter a search term (ex. Civil War). Select the term(s) that best fits your item. Copy it and paste into the template.

Examples:

650 United States--History--Civil War, 1861-1865.
650 Civil war--Fiction.

*651 – Geographic Term*

If your item is about a geographical location, delete all the text in the 651 field and replace with the location. If your subject is not a geographical location, delete the tag. We recommend searching Library of Congress Authority Headings and copy/paste the subjects from there into your template. You can also copy from items in your own catalog.

To access Library of Congress, go to [http://authorities.loc.gov](http://authorities.loc.gov) Click on Search Authorities. Enter a search term (ex. Paris). Select the term that best fits your item. Copy it and paste into the template.

Examples:

651 Paris (France)
651 Ohio and Erie Canal (Ohio)--History.

7XX – Added Author

If your item has been written by multiple authors or contributors, select the appropriate 7XX tag. Entries in these tags are searchable by author. If your item is the work of a single person, delete all three 7XX tags.

700 – Use this for specifically named authors or contributors. You can also use this tag to add authors of titles in a 505 tag. Delete “PERSON’S LAST NAME, FIRST NAME” and replace with author - last name first. You should add a 700 tag for each author you include. Put your cursor in the 700 tag and click the Add a Field helper. You can add as many authors and 700 tags as you need.

Examples:

700 Steinbeck, John
700 Hemingway, Ernest

710 – Use this tag if your item was created by a corporation. Delete “CORPORATE NAME” and replace with the name of the corporation.

Example:

710 Creative Adventures
710 Disney Enterprises, Inc.

711 - Use this tag if your item was created by sponsors of a meeting. Delete “MEETING NAME” and replace with the name of the meeting.

Example: 711 SirsiDynix Super Conference 2008
730 – Uniform Title
Use this tag if your item is commonly known by another title. **Delete** “UNIFORM TITLE” and **replace** with the alternate title. If there is no uniform title, delete the tag.

Example: 730 The Bible

856 – Internet site
If there is an internet site connected to this item, **delete** “URL” and **replace** with the complete url here. If there is no related site, delete the tag.

Example: 856 http://www.infohio.org/LibraryStaff/CatResources.html

*989 – INFOhio Template
“Original Record” must be included in your record. Do not make any changes or delete it.
Duplicate Title

The Duplicate Title wizard allows you to create a new bibliographic record by copying and then making changes to an existing record.

**NOTE:** INFOhio does not recommend using this wizard except as specified in the equipment template documentation 11.9. If you cannot find a record for your item, follow the directions in Section 11.9 for adding a new record to your database with a template. This will ensure that you have the leader and fixed fields filled out correctly. This also formats the major fields for you. The Guidelines for Derived Cataloging are included as a tip sheet in this section. However, by the time you make all the required changes, plus research how to enter fields you need, you'll find the template option to be faster and more accurate.

1. **Click** on Cataloging Wizard.
2. **Click** on the Duplicate Title Wizard.

**NOTE:** Set Properties may display as the first step. Press Enter to accept the default values or enter desired default values for this record.

3. **Locate** the title you want to duplicate.

4. **Click** duplicate.

**Duplicate Title** screen displays.

5. **Make changes** to required fields on the Bibliographic Tab (as directed in guidelines for Derived Cataloging document)

6. **Make changes** to fields needed to match the record to your item. Use helpers to add or delete fields.

7. **Click** on Call Number/Item Tab.

8. **Enter** item and call number information as needed.

9. **Save** your changes.

**NOTE:** Do not make any changes on the Control Tab.
Adding 521 Lexile Tag

Lexile levels are searchable in CAT2.0. Follow the directions carefully to be sure you’ll get results when you search. You will find a lot of information about lexiles at [http://www.lexile.com](http://www.lexile.com). There is a quick book search feature which allows you to search by title or author to locate the lexile level of a book.

1. **Click** on Cataloging Wizard.

2. **Set properties**
   - **Right Click** on the Modify Title Wizard.
   - **Change** the properties to MARC View.

   **Click** on Modify Title Wizard.
   **Modify Title:** screen displays.

3. **Locate** the title you want to modify. **Click** Modify. **ModifyTitle** screen displays.

4. **Update or add an 040 tag**.
   a. Add subfield d ( |d ) with your LC/NUC code to the 040 tag. There can be more than one |d.
   b. If you do not know your code, it can be found at [http://lcweb.loc.gov/marc/organizations/](http://lcweb.loc.gov/marc/organizations/)
   - If there is no 040 tag, create one and enter your code in subfield a of the 040.

5. **Add a 521 tag**.
   a. **Click** on the highest tag before 521.
   b. **Right mouse click** and **select** Add Field After.
   c. **Type** 521 in the newly created tag.
   d. **Press** tab.
   e. Type 8 for the first indicator.
   f. **Press** Tab and **enter** the Lexile number followed by |bLexile

6. **Click** Save.

7. **Click** on Call Number/Item Tab if modifications are needed to item or call number information.

8. **Save** your changes.

**NOTE:** *Do not make any changes on the Control Tab.*
Adding 526 Reading Program Tag

The ModifyTitles wizard allows you to make changes to bibliographic records already in the catalog.

NOTE: Before you modify a record, please consult the Tip Sheet (Sec. 12.6) Enhancing Marc Records.

1. Click on Cataloging Wizard.

2. Set properties
   - Right Click on the Modify Title Wizard.
   - Change the properties to MARC View.

   Click on Modify Title Wizard. Modify Title: screen displays.

3. Locate the title you want to modify. Click Modify.

   ModifyTitle screen displays.

4. Update or add an 040 tag.
   a. Add subfield d (|d) with your LC/NUC code to the 040 tag. There can be more than one |d.
   b. If you do not know your code, it can be found at http://lcweb.loc.gov/marc/organizations/
   c. If there is no 040 tag, create one and enter your code in subfield a of the 040.

5. Add a 526 tag.
   a. Click on the highest tag before 526.
   b. Right mouse click and select Add Field After.
   c. Type 526 in the newly created tag.
   d. Type 0 (zero) for the first indicator.
   e. Type |bInterest level|cReading level|dTitle point value|5Building code

   Use this format:
   Program Name|bInterest level|cReading level|dTitle point value|5Building code
You can copy or modify the information from the list provided below.

- Essential: The building code |5 is essential to have the record correctly displayed in Cat2 if you have the “Check for Tests” feature turned on in the OPAC. If not, the |5 field is not necessary.

- Each unique |5 location MUST have a separate 526 tag.

- No punctuation is needed at the end.

   Accelerated Reader AR|bK-2|c1.0|d1.0|5<building code> | Reading Counts|bK-2|c1.0|d1.0|5<building code>
   Accelerated Reader AR|bK-2|c2.0|d2.0|5<building code> | Reading Counts|bK-2|c2.0|d2.0|5<building code>
   Accelerated Reader AR|b3-5|c3.0|d3.0|5<building code> | Reading Counts|b3-5|c3.0|d3.0|5<building code>
   Accelerated Reader AR|b3-5|c4.0|d4.0|5<building code> | Reading Counts|b3-5|c4.0|d4.0|5<building code>
   Accelerated Reader AR|b3-5|c5.0|d5.0|5<building code> | Reading Counts|b3-5|c5.0|d5.0|5<building code>
   Accelerated Reader AR|b6-8|c6.0|d6.0|5<building code> | Reading Counts|b6-8|c6.0|d6.0|5<building code>
   Accelerated Reader AR|b6-8|c7.0|d7.0|5<building code> | Reading Counts|b6-8|c7.0|d7.0|5<building code>
   Accelerated Reader AR|b6-8|c8.0|d8.0|5<building code> | Reading Counts|b6-8|c8.0|d8.0|5<building code>
   Accelerated Reader AR|bUG|c9.0|d9.0|5<building code> | Reading Counts|bUG|c9.0|d9.0|5<building code>
   Accelerated Reader AR|c10.0|d10.0|5<building code> | Reading Counts|c10.0|d10.0|5<building code>
   Accelerated Reader AR|c11.0|d11.0|5<building code> | Reading Counts|c11.0|d11.0|5<building code>
   Accelerated Reader AR|c12.0|d12.0|5<building code> | Reading Counts|c12.0|d12.0|5<building code>

6. **Click** Save.

7. **Click** on Call Number/Item Tab if modifications are needed to item or call number information.

8. **Save** your changes.

**NOTE:** *Do not make any changes on the Control Tab.*
Adding 856 Tag – URL link to podcasts

Adding an 856 tag to a marc record will put in a hyperlink to a web site. It will also add a link icon to the record in CAT. Keep in mind, once you add a link to a record, you’ll need to maintain it. **You must have** a 590 tag to make your records searchable so you can maintain them and students or teachers can locate them easily.

1. **Click** on Cataloging Wizard.

2. **Set properties**
   - **Right Click** on the Modify Title Wizard.  
   - **Change** the properties to MARC View.

   **Click** on Modify Title Wizard.  
   **Modify Title** screen displays.

3. **Locate** the title you want to modify. **Click** Modify.  
   **ModifyTitle** screen displays.

4. **Update or add an 040 tag.**
   - Add subfield d ( |d |) with your LC/NUC code to the 040 tag. There can be more than one |d.  
   - If you do not know your code, it can be found at [http://lcweb.loc.gov/marc/organizations/](http://lcweb.loc.gov/marc/organizations/)  
   - If there is no 040 tag, create one and enter your code in subfield a of the 040.

5. **Add an 856 tag.**
   - **Right Click** on the last tag number lower than 856. In the sample, it is 710. If there is already an 856 tag, put this before it.  
   - **Select** Add Field After.  
   - **Type** 856 in the tag number box.  
   - **Press** tab.  
   - **Add** the indicators 42. (The 4 means it’s a web resource and the 2 means it’s related to the title.)  
   - **Press** tab.  
   - **Type** |u and **paste** in the url.  
   - **Type** |y Enter text you want to display when you hover over the link icon in the opac. This is especially important if the record has more than one link. **NOTE:** This will not be in effect until Summer 2010, but continue adding |y to your records so they’ll be ready when this enhancement is complete.  
   - **Click** Save.
6. **Add a 590 tag** – Local Note. All of the information entered here is searchable in Workflows (general search) and the opac (all fields search). You can add any or all of the options. **BE CONSISTENT!**

   - What – audio student review, podcast, book talk, etc.
   - Who – teacher’s name, student name (follow your school policies)
   - When – October 2009, Spring 2010
   - Where – My school

<table>
<thead>
<tr>
<th>Local note</th>
<th>590</th>
<th>Audio student review created in Mr. Jones’s class at Jonesville Jr. High during 2009-2010 school year.</th>
</tr>
</thead>
</table>

8. **Add a 989 tag - IMPORTANT!** This will keep your local recordings out of the CRC.

   - **Type** Local

9. **Add an Item Note** (Optional)

   - **Click** on Call Number/Item Tab.
   - **Add** a public note to display in the online catalog.
   - You will need to add a note to each item.

<table>
<thead>
<tr>
<th>LEECA High School</th>
<th>Copies</th>
<th>Item Group</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>Fiction Collection</td>
<td>Available</td>
</tr>
</tbody>
</table>

**Note:** Click link icon to hear a student review of this title.

10. **Save** your changes.

**HINT:** If you have multiple bib records for the same title, modify all of the records.
Modify Title

The Modify Titles wizard allows you to make changes to bibliographic records already in the catalog.

**NOTE:** Follow the Guidelines for Enhancing Marc Records. This is a Tip Sheet in 12.6 of the Sirsi manual. It will explain in detail how to make changes in various fields as well as other information that must be edited when you change a marc record.

1. **Click** on Cataloging Wizard.
2. **Right Click** on the Modify Title Wizard.
3. **Change** the properties to MARC View.
4. **Click** on Modify Title Wizard.

   **Modify Title:** screen displays.

5. **Locate** the title you want to modify.

6. **Click** Modify.

   **ModifyTitle** screen displays.

7. **Make changes** to required fields on the Bibliographic Tab (as directed in the Guidelines for Enhancing Marc Records document)

8. **Make changes** to fields needed to match the record to your item. Use helpers to add or delete fields.

7. **Click Save**.

8. **Click** on Call Number/Item Tab if modifications are needed to item or call number information.

9. **Save** your changes.

**NOTE:** Do not make any changes on the Control Tab.
Cataloging eBooks

When cataloging eBooks, both digital reproductions of a print title or born digital (never in print format) titles, you will have one of these scenarios:

1. A MARC record is available for your eBook.
2. You can find a record for the print version, but not the eBook. You need to modify the print version’s record to match your eBook.
3. No record can be found for either the print version or the eBook. You’ll need to catalog the eBook using a Template.

Follow the directions in the appropriate section of this document.

A Marc Record is available for your eBook

1. Follow the INFOhio cataloging method by checking your own database for an existing record.
   a. If there is an eBook record, just confirm that the url in the 856 tag is what you want.
   b. If there is no record, export the record from SmartPort as usual (Section 11.6) and modify as described below.

2. **Click** on the Cataloging Wizard.

3. **Set properties**
   a. **Right Click** on the Modify Title Wizard.
   b. **Change** the properties to MARC View.

4. **Click** on Modify Title Wizard.

   **Modify Title**: screen displays.

5. **Locate** the title you want to modify. **Click** Modify.

   **ModifyTitle** screen displays.

6. **Update or add an 040 tag**.
   a. Add subfield d ( |d |) with your LC/NUC code to the 040 tag. There can be more than one |d.
   b. If you do not know your code, it can be found at [http://lcweb.loc.gov/marc/organizations/](http://lcweb.loc.gov/marc/organizations/)
   c. If there is no 040 tag, create one and enter your code in subfield d of the 040.
      i. **Click** on the tag number lower than 040.
      ii. **Right click** and select Add Field After.
      iii. Type 040 in the box.
      iv. **Tab** to the contents area and enter |d plus your code.
7. **Add a 655 tag – genre**
   a. Right click where you want the 655 tag, add a field, and type 655. There can be more than one 655 tag, so even if there is already a 655 tag, add a new one.
   b. Tab to the indicator box. First indicator is blank, second indicator is zero (0).
   c. In the Contents area, type **Electronic books**.

8. **Add a 690 tag**.
   a. Right click where you want the 690 tag, add a field, and type 690. There can be more than one 690 tag, so even if there is already a 690 tag, add a new one.
   b. In the Contents area, type **eBook|2local**

9. **Add an 856 tag**. *(If there already is an 856, be sure it links where you want. If not, add a new 856 above it.)*
   a. Right **Click** on the last tag number lower than 856. In the sample, it is 710. If there is already an 856 tag, put this before it.
   b. **Select** Add Field After.
   c. Type 856 in the tag number box.
   d. **Press** tab.
   e. **Add** the indicators 40. *(The 4 means it’s a web resource and the 0 means it’s the actual resource.)*
   f. **Press** tab.
   g. **Type** |u and **paste** in the url.
   h. **Type** |y and **enter** text you want to display when you hover over the link icon in the opac. This is especially important if the record has more than one link. *(ex. |yRead online)*

**NOTE:** *The hover display will not be in effect until Summer 2010, but continue adding |y to your records so they’ll be ready when this enhancement is complete.*

10. **Add a 989 tag - IMPORTANT!**
    a. **Type** Derived Record

11. **Click** Save.
Modify a record for the print version to match your eBook

1. Follow Steps 1-6 above and bring a new record in via SmartPort.

2. **Add an 006 tag.**
   - a. Use the add a field helper to add a tag and type 006.
   - b. **Press** tab.
   - c. In the pop up box, **highlight** a - Book.
   - d. **Click** OK.

3. **Add an 007 tag.**
   - a. Use the add a field helper to add a tag and type 007.
   - b. **Press** tab.
   - c. In the pop up box, **highlight** c – Electronic resource.
   - d. **Click** OK.
   - e. **Click** in the Content entry box next to 01 Type_Mat and type **r**. “Remote” will appear.
   - f. **Press** Enter.

**NOTE:** There will be several pipes and symbols in the 006 and 007. That is normal. Do not remove them.

4. **Modify the 245 tag.**
   - a. **Click** in the 245 tag Contents area.
   - b. After the title, **add** the General Material Designation - |h[electronic resource]. Do not leave a space between the last word in the title and the pipe. Leave any existing punctuation after it.

5. **Modify the 300 tag.**
   - a. Click in the 300 tag Contents area.
   - b. Add phrase **1 online resource** before print description placing print description in parenthesis.

**Example:**
```
| Physical descrip | 300  | 1 online resource (309 p.) | bill |
```

---

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Cataloging eBooks

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6. **Add a 500 tag.**
   a. Use the add a field helper to add a tag and type 500. There can be more than one 500 tag, so even if there is already a 500 tag, add a new one.
   b. In the Contents area, use the add a field helper to add a tag and type 500. There can be more than one 500 tag, so even if there is already a 500 tag, add a new one.

7. **Add a 655 tag – genre**
   a. Right click where you want the 655 tag, add a field, and type 655. There can be more than one 655 tag, so even if there is already a 655 tag, add a new one.
   b. Tab to the indicator box. First indicator is blank, second indicator is zero (0).
   c. In the Contents area, type Electronic books.

8. **Add a 690 tag.**
   a. Use the add a field helper to add a tag and type 690. There can be more than one 690 tag, so even if there is already a 690 tag, add a new one.
   b. In the Contents area, type eBook|2local

9. **Add an 856 tag**
   a. Type 856 in the tag number box.
   b. Press tab.
   c. Add the indicators 40. (The 4 means it’s a web resource and the 0 means it’s the actual resource.)
   d. Press tab.
   e. Type |u and paste in the url.
   f. Type |y Enter text you want to display when you hover over the link icon in the opac. This is especially important if the record has more than one link. (i.e.|y|Read online)

**NOTE:** The hover display will not be in effect until Summer 2010, but continue adding |y to your records so they’ll be ready when this enhancement is complete.

10. **Add a 989 tag - IMPORTANT!**
    a. Type Derived Record

11. **Click** Save.
Add an item and call number

Even though you do not have a physical item, you should assign a dumb barcode to your eBooks.

1. You can change the call number from XX to EBOOK. This displays nicer in CAT and makes it more obvious it is an eBook.
2. Call numbers options can include:
   a. EBOOK
   b. EBOOK FIC ABC
   c. EBOOK 123.45 ABC
   d. EBOOK BIO LINCOLN
3. Making the item group EBOOK, will allow students to do a search in CAT 2.0 – no search term needed to display all eBooks. Doing a general or all fields search for ebook, will bring up records with an eBook isbn included, whether or not your item is an eBook.
4. Making the material type EBOOK will change the icon in CAT.
5. The item will indicate the building for the eBook, i.e. it may be for elementary rather than high school.
6. You have the option of adding a public note.
7. You will be able to run a shelflist to get a list of all your eBooks.
MARC Export

The MARC Export Utility wizard can be used to export catalog records from the Unicorn database and copy them to a file on the workstation or the Unicorn server. Catalog records may be exported for a number of reasons.

- To contribute to a state library catalog or union holdings list.
- To have authority processing done by a vendor.
- To maintain holdings at a book jobber/vendor to check orders for duplicates.

Do the following to review and export records:

1. **Set Properties** on the MARC Export wizard (right-click for property settings).
   a. Select **Include 999 holdings** tag, if this export file needs holdings included (ex – for collection analysis)
   b. Decide how many records you want to export to each file for viewing, and set the MARC Export wizard properties accordingly. **If exporting for file analysis, it is best to select “Export all records to one file” – you will have one file for export.** Or if 1000 records are being exported, and you want to put 300 records in each file, select the **Include N Records** export option in the wizard properties, and type 300 in the text box. You will have several files when completed.
   c. If you want to preview the catalog records before exporting them, decide how many records to display in each preview file, and set the MARC Export wizard properties accordingly. **It is best not have more than 300 records per file, since viewing such a large document in Word will be difficult.** For example, all records are being exported, and you want to put 300 records in each file for viewing. Select the **Include N Records** view option, and type 10 in the text box.

2. **Run** the **Extract Keys for MARC Export** report.
   a. **Click** on Schedule New Reports.
   b. **Click** on Bibliographic Tab.
   c. **Select** the **Extract Keys for MARC Export** report. **Select** the criteria to pull records. This report selects the catalog records that will be exported and saves the number of catalog records specified in the wizard properties to each file. Select “Run Now”.

3. **Click** on Cataloging Wizard.

4. **Click** MARC Export wizard.

5. If property window displays, verify the wizard properties are set as you want (see above) and **click** OK.

6. If you want to preview the catalog records before exporting them:
a. Click the Preview tab. If a File to View list displays, select the file of records you want to view.

b. Click Preview button. Repeat this step for all the files you want to display.

7. Click on the Export tab. The Records Selected On field shows the most recent run date and time of the Extract Keys for MARC Export report. The Record Count field displays the total number of catalog records to be exported.

8. In the File name on client option, select the gadget, name your file (exportdata is suggested), and save your file on your computer.

9. Click Export.
10. When the wizard finishes exporting the files, the log.txt file opens and displays the export log. **Review** the log file, and close the log file window.

```
INFOhio/Sirsi K12 Manual Symphony
MARC Export

10. When the wizard finishes exporting the files, the log.txt file opens and displays the export log. **Review** the log file, and close the log file window.

```

11. **Click** OK to close the Completed dialog box.

The file is now in Marc format and saved on your computer ready to send as necessary.

**NOTE:** If the report file does not exist in the Unicorn/Xfer directory when the MARC Export Utility wizard is used, a message appears and informs you to run the Extract Keys for MARC Export report before exporting records.

MAC USERS – Workaround for saving file to computer desktop:

```
MAC USERS – Workaround for saving file to computer desktop:

```

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(NOTE – no place to name this file in order to save it onto the desktop – compare to PC screenshot, where you can name the file and save it)

What follows is a “workaround”:

**MAC Workaround:**

Select TextEdit application, create an empty document with name of *exportdata*:
Step to name/save file:

In the **File name on client** option, **select** the gadget, **SELECT** the empty **exportdata.txt** document, and **save your file to (as) that document** on your computer.
Click **Export**

Click **OK** to close the Completed dialog box.

The file is now in Marc format and saved on your computer ready to send as necessary.

**Note:** For more detailed information or specific questions, use HELP wizard.
SIRSI Cataloging Configuration

**TITLE**

Bibliographic description entered in accordance with AACR2 standards

MARC 21 Standards defines tags, indicators, and subfield codes so that library software can store and access data.

Punctuation for the separation of subfields is defined so that the system can properly index and sort the information.

---

**Call Number Record**
- Building code
- Call number
- Class Scheme

---

**Item Record**
- Barcode
- Copy number
- Price
- Item Group
- Status
- Material type
- Notes

---

**Call Number Record**
- Building code
- Call number
- Class Scheme

---

**Item Record**
- Barcode
- Copy number
- Price
- Item Group
- Status
- Material type
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---

**Item Record**
- Barcode
- Item number
- Price
- Item Group
- Status
- Material type
- Notes
Cataloging Helpers

Cataloging Helpers will appear on appropriate screens as you perform cataloging functions. Only helpers that function from a specific screen will display.

1. **Show/Hide Search Pane Helper**

   Search Pane – Contains the Search edit box. This pane also provides search type, search index, and search library options. If there is an existing current title, it will display next. This pane also contains the type of search you want to perform, Keyword, Browse or Exact.

2. **Show/Hide Viewer Helper**

   Viewer Pane – Displays the list of matching records after you perform a search. A summary statement of your search results appears at the top of the Viewer Pane. Depending on your search results or the type of search you are performing, a Browse list may display. Hit lists will appear on Headings and/or Records tabs. Selected entries on the Headings or Records tab cause the record's Description, Call Number/Item, Bound-with Information, and possibly other tabs, such as Order Information, to display.

3. **Show/Hide Circulation and Extended Information Helper**

   When using the Item Search window, the Show/Hide Circulation Information helper is available. The Show/Hide Circulation Information Pane helper is a toggle helper. That is, this helper can turn the Circulation Information area on (show) or off (hide).

   In the Item Search window, the Circulation Information area displays item circulation information about the selected title. Item circulation information might include price, item type, home location, current location, and item categories, date created, date charged, and so on.
   To turn the Circulation Information area on or off, click the Show/Hide Circulation Information helper.

4. **Show/Hide Tree Information Viewer**

   Bound-with Tree Pane – Contains the title you selected to be linked. The Bound-with tree displays a hierarchical structure (tree view) of the title record and its call numbers and items. You can expand (click a plus sign) or collapse (click a minus sign) the structure to make it easier to use. Clicking the plus sign next to the title record displays its call numbers and items. The tree uses icons to indicate a title record, call number record, and item.
5. **Set Option for Item Lookup**

Use the Set Options for Item Lookup helper to qualify the search method you have selected to conduct the search. The following item lookup options are available. Select a folder tab to see the options.

- **Search**
- **Browse**
- **Display (Exact)**

**FYI: Sort By**

The Search or Browse lookup results will be sorted by the selected criteria. The following sort options are available.

If a sort order is not selected, results display in the order that they were entered into the catalog or last modified. **Author** sorts by the first occurring author field in the record. Titles that do not include an author display first in the list. Main entry (1xx) and added entry (7xx) authors are combined in the sort. **Title sorts** by the title statement (245) entry. **Subject** sorts by the first occurring subject field in the record. All subject heading types, including topics, names, titles, and geographic headings (6xx) are combined in the sort. **Pub Year** sorts with the earliest published titles first. **Reverse Pub Year** sorts with the most recently published titles first. Modifications to these folders are retained until another wizard is selected. If your search does not return results, a message will suggest that your lookup options are too restrictive.

6. **List the Catalog by Call Number Helper**

The List the Catalog by Call Number helper is used to display all of the call number records in your library’s system, which share the same call number or portion of a call number. This feature is useful when assigning call numbers and finding materials using specific class numbers.

You may display the catalog by call number at any time when using the wizard. Enter the call number or portion of call number that you want to search in the Start List With field. Do not enter any truncation symbol for a call number portion, but be sure to properly capitalize and punctuate the call number you enter. Any call number that includes the text will be retrieved. The records that are retrieved may not be displayed in call number order.

**Example:**

If you listed the catalog for call numbers including KF4, a sampling of call numbers would be listed in the following order.

- KF410 .K9
- KF4114 .D76

**NOTE:** To browse only your own library collection in shelf list order, browse by call number using the tem Lookup. After a list is retrieved, you may select to view the bibliographic, volume, and copy information, look up another call number, or close the helper.
7. **Display Bibliographic description**

The Display Bibliographic Description helper is used to display bibliographic, call number/item, and order information about the current item.

Bibliographic Information
Under Bibliographic Information, the following information may appear.
- LCCN
- ISBN
- Author
- Title

Publication Information
- Physical Description
- Subject Term
- Holdings statement

**NOTE:** *The bibliographic information that appears depends on the entries defined in your All, Brief, or Full entry templates for the format being displayed.*

Under Call Number and Item Information, the following information appears.
- Title’s call number
- Number of items
- Holding library
- Items
- Item IDs
- Item types
- Current locations
- Whether or not the item can circulate
- Number of current holds
- Item extended information, such as staff and public notes

8. **Modify Selected Items Helper**

The Modify Selected Items helper allows you to search for items by title, and then select the items you want to modify.

Click the **Modify Selected Items** helper. The Item Search window appears.

Use Item Search to search for the title you want. If a Current record exists for the item, click the Current information link to access the last record displayed, modified, or added.

If your search finds results, a list of matching records display in the hit list area. Select the record you want to display. The selected title displays in the Viewer pane on the Call Number/Item tab.

To modify all items at once, select the check box next to the title record.

To modify individual items, select the check box next to each item you want to modify.

Click **Next**. The item values you want to modify appear.

Click **Modify** to apply the global modifications.

-Or-

Click **Cancel** to return to the Global Item Modification wizard.
9. **Show Valid 852 Locations Helper**

This helper displays only when a MARC Holdings record is displayed for modification. You can modify MARC holdings when you are working with either catalog records or serial control records. Click the Show Valid 852 Location helper.

In the Valid 852 Locations list, select the 852 location you want, and then click OK to copy the 852 location text you selected to the Windows Clipboard.

Click the place in the 852 entry where you want the information to appear, and then press CTRL+V to paste the text in the 852 entry line.

After you have pasted the text, your 852 entry might look something like this: |cSTACKS

Click **Save and Close** to save your changes or **Close** to close this helper without saving any changes.

**Note**: The 852 locations that display in the Valid 852 Locations list are Location policies, which are valid in the MARC Holdings record, for your library.

10. **Validate Headings**

The Validate Entries helper allows you to check bibliographic headings under authority control and to validate indicators and subfields. This helper displays only in wizards that permit modification of the bibliographic record in the Bib folder.

**NOTE**: The Validate Headings helper saves any changes to the bibliographic record before beginning.

With the Validate Entries helper, you may be prompted to verify tags under the following circumstances. The indicators do not meet the parameters defined in your entry list. Use the verify list to select indicators that are valid for that entry. To display valid indicators for the second indicator position, you must place your cursor on the second position before selecting the verify list.

**NOTE**: In many cases, entries do not have any valid indicators. If the verify list does not display data, there are no valid indicators defined for that position.

Authority headings in author (1xx, 7xx), series (4xx) or subject (6xx) tags are unauthorized. Use the Browse Authority gadget to validate the heading.

After reviewing the displayed indicator or heading problem, take one of the following steps:

- OK the changes to validate the entry. If the change made to the indicator or entry is valid, the OK will advance to the next entry in the list. If the changed indicator or entry cannot be validated, it will continue to display as the current entry until it is either corrected or skipped. Invalid or skipped entries continue to display the next time the validate entries helper is invoked.

- Skip the indicator or entry displayed without making changes or validating the change.
- Skip all subsequent invalid indicators and unauthorized entries for the title without making additional changes.

**NOTE:** If the behavior properties in the Validate Headings helper are not configured to skip unauthorized headings, the Skip and Skip Rest buttons do not display.

**NOTE:** The Validate Headings helper will not display in cataloging wizards unless the system is configured for authority checking.

### 11. Shadow Options

This helper governs the display of items in the shadow catalog. In the Item Search and Display wizard, or any process of reviewing a record, this helper is referred to as the Shadow Levels helper, and displays the information without allowing edits.

The library may want to hide or "shadow" records, which cannot be used by patrons, such as lost or missing volumes/copies or titles still being cataloged by technical services. The shadow options permit catalog, call number, and copy records to be searchable only by library staff.

**NOTE:** A Location policy may also be defined as a shadow location, so any item with a shadowed current status will display as a shadowed copy. Once a shadowed location is created, its shadow status cannot be modified.

When the Shadow Options helper is selected, the shadow options that display are based on the level of record that you are working with. If you are creating or editing a title and your properties allow, you can shadow at the title, call number, and/or copy level. If you are adding or editing a call number, you can shadow at the call number and/or copy level. If you are adding or editing a copy, only the copy level shadow option will display. A shadow copy option will not display for a call number that does not have an attached copy.

If the item you are editing is already in the shadow catalog, the shadow options will display enabled.

- Enable the Shadow Title checkbox to prevent the title and all of the call numbers and copies associated with it from displaying to the public.
- Enable the Shadow Current Vol. checkbox to prevent the call number and all copies associated with it from displaying to the public.
- Enable the Shadow Current Copy checkbox to prevent the single copy from displaying to the public.

It is only necessary to enable the highest level of shadowing. However, a title being shadowed temporarily that should still have call numbers or copies shadowed when it is returned to the standard index should be shadowed at multiple levels.

The status of any of item can be changed so that it moves from the standard catalog index to the shadow catalog, or from the shadow catalog index to the standard catalog.
12. **Insert a field Before the current one Helper**

The Before helper can be accessed from commands that create hold, item, or user records or from commands that modify this information. The Before helper allows fields to be added before the field in which the cursor is positioned.

**NOTE:** If you don't want to use your mouse to select the helper to enter a new line, you may enter the key combination "Ctrl B" to enter a line after the field in which the cursor is positioned.

13. **Add a field After the current field Helper**

The After helper can be accessed from commands that create hold, item or user records or from commands that modify this information. The After helper allows fields to be added after the field in which the cursor is positioned.

**NOTE:** If you don't want to use your mouse to select the helper to enter a new line, you may enter the key combination "Ctrl A" to enter a line after the field in which the cursor is positioned.

14. **Append a field Helper**

In addition to adding fields, you can also append a field to a record. When you append a field to a record, Unicorn adds the new field at the end of the record.

Position your mouse pointer anywhere in the Editor window, and then click the **Append Field** helper.  
- Or-  
Right-click anywhere in the Editor window to open the shortcut menu, and then click **Append Field**.  
Type the field you want to add. Unicorn adds the new field at the end of the record.

15. **Delete the current field Helper**

While editing a record in MARC View you can delete the current field from the record. In MARC 21 format, you cannot delete the LDR and 008 fields.  
Position your mouse pointer on the field you want to delete.

Click the **Delete** helper.  
- Or-  
Right-click to open the shortcut menu, and then click **Delete Field**

The Delete helper can be accessed from commands which modify hold, item, or user information. The Delete helper allows an entry to be deleted.

**NOTE:** The Delete helper may display either on the right or left hand side of the window.
The Call Number / Item Maintenance, Add Title, Duplicate Title, and Modify Title wizards allow the following properties to be set (Behavior and Helpers set by Administrator or Supervisor level access). Default properties can be set by the user on their workstation. (See SET PROPERTIES Section 3.4 for more information.)

**NOTE:** The options available will vary slightly depending on the wizard selected.

### Behavior

The Add Call Number property is enabled to allow the addition of items to the new title at the end of the wizard. This property must be enabled to utilize the Prompt for Library when Adding New Call Number field. The following fields affect the added call numbers.

- Prompt for Library when Adding New Call Number, which is delivered enabled.
- Auto-generate Temporary XX Numbers, which is delivered disabled.
- Add Copy when Adding New Call Number, which is delivered enabled.

The Add Item property is enabled to permit the addition of items within the wizard and as one of the steps at the end of the wizard.

The Auto-generate Item ID when Adding Item property, which is delivered disabled, automatically assigns new item IDs when any copy is added. Contact your ITC to have this turned on for you.

Delete Call Number – Allows deletion of call numbers in the wizard.

Delete Item – Allows deletion of items in the wizard.

Maintain MARC Holdings – Allows working with MARC Holdings information. This is delivered disabled.

ISXN Warnings Must Be Acknowledged – Displays ISBN or ISSN validation warnings when an incorrect ISBN/ISSN is entered. You will have the opportunity to correct the ISBN or ISSN or acknowledge the warnings and continue. The dialog displays separate lists for invalid ISBNs and invalid ISSN.
Defaults

The Show These Values field governs the display of the Defaults properties page while working with the wizard. The delivered default displays the properties page only when the wizard is started.

Default Values

1. Sirsi is delivered with the title defaults:
   Format - MARC
   Entries template - FULL
   Add item when creating a title.
   You can also enable the Shadow Title field if you want to shadow a title as it is created.

2. Editor display options are delivered with descriptive view enabled.

3. Call number/Item default values – a library should be set.
   If not, the library defaults to the library associated with the user logged in.
   Be sure to leave class scheme at ATDEWEYLOC.

4. Item required default values are delivered with Type as NONFICTION.
   Shelf Location default value is delivered as AVAILABLE.

   The Permanent field indicates whether the item is part of your library's permanent collection, the Circulate field controls whether a system-generated circulation rule can be overridden, and the Shadow Item field determines whether the item will be shadowed. The Permanent and Circulate fields are delivered enabled. The Shadow Item is delivered disabled.

5. Item optional default values can be preset if you like. You can enter price and funding source.
   Material Type – default delivered is BOOK
Helpers

The helpers are all delivered enabled - Validate Headings, Print labels, Print preview labels, and list catalog by call number.

**NOTE:** The Validate Headings Helper property will not display unless authority checking is configured.

Note: For more detailed information or specific questions, use HELP wizard.
Class Scheme  
(Shelving Scheme or Shelving Key)

This policy name identifies the call number's classification scheme. The Class Scheme automatically generates the correct shelving key based on the Class Scheme policy which defines capitalization rules, sorting rules, and ascending or descending order. 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.

The following sort rules are used with class schemes.

<table>
<thead>
<tr>
<th>Name</th>
<th>Definition</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>AT Dewey with Location*</td>
<td>AT Dewey with Location, used with ATDEWEYLOC classification, is for Dewey call numbers sorted by author and title and preceded by a location. The location is read as entered, the fiction indicator is expanded to three letters, and 3-letter author and title cutters are provided if needed. Any numerals in the call number are expanded to six digits (zero filled). A call number of JUV F CLE produces a shelving key of JUV FIC CLE JAN for the Beverly Cleary's book Janet's Thingamajigs in the juvenile JUV collection. The location letters are left as is. The next letters are the fiction marker and are expanded to three characters. The 3-letter cutter for the title is added. The same item with the call number J FIC CLE JAN produces the shelving key J FIC CLE JAN. The expansion and the cutters are not necessary. The call numbers LP F MIT HAW V.1 and LP F MIT HAW V.2 represent the Large Print edition of James Mitchener's Hawaii. The shelving keys are created as: LP FIC MIT HAW V.0000001 and LP FIC MIT HAW V.0000002. The numerals in the volume statement expand to six digits.</td>
<td></td>
</tr>
<tr>
<td>*(Recommended)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ASIS</td>
<td>ASIS means &quot;as is.&quot; It sorts the call number exactly as it is entered. LC or Dewey call numbers do not sort properly with ASIS, but it is appropriate for other kinds of call numbers or accession numbers. AV equipment serial numbers like S/N 23456-981 would sort exactly as entered into the call number field.</td>
<td></td>
</tr>
<tr>
<td>Scheme</td>
<td>Description</td>
<td>Example</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
<td>---------</td>
</tr>
<tr>
<td>AT Dewey</td>
<td>AT Dewey, used with ATDEWEY classification, is for Dewey call numbers sorted by author and title. A 3-letter title cutter or both a 3-letter author and title cutter may be added to the existing call number. A cutter is not added if it already exists in the call number. Any numerals in the call number are expanded to six digits (zero filled).</td>
<td>A call number of FIC produces a shelving key of FIC DUN TWO for Dominick Dunne’s book The Two Mrs. Grenvilles. A call number of F STE produces a shelving key of F STE DAD for Danielle Steel’s book Daddy.</td>
</tr>
<tr>
<td>Dewey</td>
<td>Dewey, used with DEWEY classification, sorts Dewey Decimal nonfiction call numbers. This rule assumes that the first numeral encountered is the classification code, and expands the numeral to three characters. Any preceding letters are location marks to be ignored. Letters after the classification numeral group are to be left as is. Numerals after the classification group expand to six digits.</td>
<td>A call number of 133.69 BIL produces a shelving key that looks the same:133.69 BIL. A call number of B 92 LIN produces a shelving key of B 092 LIN. &quot;B&quot; is assumed to be a location marker and is left as is. The first numeral in the call number expands to three digits. A call number of REF 811.42 RUK 1991 produces a shelving key of REF 811.42 RUK 001991. The date “1991” becomes “001991” when expanded to six digits.</td>
</tr>
</tbody>
</table>

Note: For more detailed information or specific questions, use HELP wizard.
# Sirsi K-12 Searching Strategies and Considerations

<table>
<thead>
<tr>
<th>Boolean Operators</th>
<th>Workflows</th>
<th>Web2</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AND</strong> – locates records containing all specified terms</td>
<td>Using General search: Rocks and minerals Will yield titles with the word rocks and the word minerals anywhere in any indexed field in the record. To search for phrase “rocks and minerals” enclose the words in double quotes.</td>
<td>Using All Fields search: Rocks and minerals Will yield titles with the word rocks and the word minerals in any indexed field in the record. To search for phrase “rocks and minerals” enclose the words in double quotes.</td>
</tr>
<tr>
<td><strong>NOT</strong> – locates records containing the first search term but not second</td>
<td>Using General search: Science not fiction Will yield titles with the word science but not the word fiction anywhere in any indexed field in the record. To phrase search, enclose in double quotes.</td>
<td>Using All Fields search: Science not fiction Will yield titles with the word science but not the word fiction anywhere in any indexed field in the record. To phrase search enclose in double quotes.</td>
</tr>
<tr>
<td><strong>OR</strong> – Locates records matching any or all of the specified terms</td>
<td>Using General search: help or hindrance Will yield titles with the word help or the word hindrance anywhere in any indexed field in the record. To phrase search, enclose in double quotes.</td>
<td>Using All Fields search: help or hindrance Will yield titles with the word help or the word hindrance anywhere in any indexed field in the record. To phrase search, enclose in double quotes.</td>
</tr>
<tr>
<td><strong>XOR</strong> – locates records matching any one but not all of the specified terms</td>
<td>Using General Search: Science xor fiction Will yield titles with the word science or the word fiction but not both words anywhere in any indexed field in the record. To phrase search, enclose in double quotes.</td>
<td>XOR Boolean operator is not available to be used in Web2.</td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>Positional Operators</th>
<th>Workflows</th>
<th>Web2</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAME – Locates records in which a single MARC tag field contains all specified items</td>
<td>Using General search: order same magic Will yield titles with the word order and the word magic as long as the two are in the same MARC field.</td>
<td>Using Special CCL: Order same magic Yields the same titles as Workflows. The operator SAME does not work in keyword searches.</td>
</tr>
<tr>
<td>WITH - locates records in which field contains a phrase with all of the specified terms</td>
<td>TBD</td>
<td>TBD</td>
</tr>
<tr>
<td>NEARn – locates records in which field contains all search terms in no particular order</td>
<td>Using General search: Small NEAR2 berenstain Will yield titles with the word small within 2 words of the word berenstain in any MARC field.</td>
<td>Using All Fields or Special CCL search: Small near2 berenstain Will yield titles with the word small within 2 words of the word berenstain in any MARC field.</td>
</tr>
<tr>
<td>ADJn – locates records in which field contains all search terms in order</td>
<td>Using General search: Small adj2 berenstain Will yield titles with the word small found at within two words before the word berenstain in any MARC field.</td>
<td>Using All Fields or Special CCL search: Small adj2 berenstain Will yield titles with the word small found at within two words before the word berenstain in any MARC field.</td>
</tr>
</tbody>
</table>

**NOTE:** \( n \) indicates a number can be used for proximity searching.

<table>
<thead>
<tr>
<th>Relational Operators</th>
<th>Example Query</th>
<th>Example Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; - Less than</td>
<td>WF: General - {pbyr}&lt;1950 Web2: Special CCL - {PBYR}&lt;1950</td>
<td>Titles with a publication year less than 1950</td>
</tr>
<tr>
<td>&gt; - Greater than</td>
<td>WF: General – {pbyr}&gt;2001 Web2: Special CCL – {PBYR}&gt;2001</td>
<td>Titles with a publication year greater than 2001</td>
</tr>
<tr>
<td>= - Equal to</td>
<td>WF: General – {pbyr}=2003 Web2: Special CCL – {PBYR}=2003</td>
<td>Titles with a publication year equal to 2003</td>
</tr>
<tr>
<td>&lt;= - Less than or equal to</td>
<td>WF: General – {pbyr]&lt;=1949 Web2: Special CCL – {PBYR}&lt;=1949</td>
<td>Titles published in 1949 or earlier</td>
</tr>
<tr>
<td>&gt;= - Greater than or equal to</td>
<td>WF: General – {pbyr}&gt;=2000 Web2: Special CCL – {PBYR}&gt;=2000</td>
<td>Titles published in 2000 or after</td>
</tr>
<tr>
<td>Special Characters used in Searches</td>
<td>Example Query</td>
<td>Example Result</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>---------------</td>
<td>----------------</td>
</tr>
<tr>
<td>“”  [double quotes] – denotes a single phrase search which must match in the same adjacent order.‟”  [single quotes] – used by workflows</td>
<td>WF: Title – gold rush vs. ‘gold rush’ Web2: “gold rush” vs. gold rush</td>
<td>Titles with the word “gold” and the word “rush” in the title fields vs. titles with the words “gold rush” in the title fields</td>
</tr>
<tr>
<td>( )  [parentheses] – allow search expressions to be grouped. The innermost set of parentheses is executed first.</td>
<td>WF: Subject - dogs or (DOG ADJ BREEDS) Web2: Adv. All Fields – su dogs or (su dog adj su breeds)</td>
<td>Titles with subjects on dog breed or just dogs</td>
</tr>
<tr>
<td>{ }  [curly braces] – allows you to search specific Sirsi entries which have been indexed.</td>
<td>WF: General - pumpkinhead (505) Web2: Special CCL – pumpkinhead (505)</td>
<td>Title “Nightmare hour”</td>
</tr>
<tr>
<td>[space] – must be used to separate numbers if they are to searched separately.</td>
<td>WF: General – 32 10010 (readprog) Web2: Special CCL – 32 10010 (READPROG)</td>
<td>Looking for a value of 32 and also a value of 10010 in the reading program special tag. Titles for grade level 3.2 worth one point.</td>
</tr>
<tr>
<td>,  [comma] - used to search numbers in their concatenated form, replaced by space in alphabetic search</td>
<td>WF: no example. Will search 1,2,3,4,5 as a single term Will search “dog, cat” as “dog cat”</td>
<td></td>
</tr>
<tr>
<td>.  [period] – replaced with a space in a search unless numeric, then assumed to be a decimal point</td>
<td>WF: no example. Will search “3.2” as a single term Will search “a. b” as “a b”</td>
<td></td>
</tr>
<tr>
<td>-  [hyphen] - to search with the hyphen included, same words without the hyphen will yield hyphenated words as well a non-hyphenated.</td>
<td>WF: General - hound-dog vs. hound dog Web2: All Fields – same results</td>
<td>Records with “hound-dog” vs. records with “hound and dog” and “hound-dog”.</td>
</tr>
<tr>
<td>‘  [apostrophe] - is ignored</td>
<td>WF: Title – don’t vs dont Web2: Title – don’t vs dont</td>
<td>Yields same titles</td>
</tr>
<tr>
<td>Access Points</td>
<td>Web2 Index Name</td>
<td>MARC Tags Searched</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------------</td>
<td>--------------------------------------------------------</td>
</tr>
<tr>
<td>Author</td>
<td>AU</td>
<td>100, 110, 111, 700, 710, 711, 800, 810, 811</td>
</tr>
<tr>
<td>Curriculum Alignment</td>
<td>CURR</td>
<td>658</td>
</tr>
<tr>
<td>Periodical</td>
<td>N/A</td>
<td>780, 785</td>
</tr>
<tr>
<td>Sel</td>
<td>N/A</td>
<td>594, 595</td>
</tr>
<tr>
<td>Reading Program</td>
<td>REAPROG</td>
<td>595 (from 526 contents)</td>
</tr>
<tr>
<td>Series</td>
<td>SER</td>
<td>400, 410, 411, 440, 490, 830, 840</td>
</tr>
<tr>
<td>Subject</td>
<td>SU</td>
<td>600, 610, 611, 630, 650, 651, 690, 691</td>
</tr>
<tr>
<td>Title</td>
<td>TI</td>
<td>130, 210, 245, 246, 247, 440, 505, 586, 730, 740</td>
</tr>
<tr>
<td>Author Browse</td>
<td>AU</td>
<td>100, 110, 111, 700, 705, 710, 711, 715, 720, 770, 800, 810, 811, 830, 840</td>
</tr>
<tr>
<td>Periodical Title Browse</td>
<td>N/A</td>
<td>780, 785</td>
</tr>
<tr>
<td>Series Browse</td>
<td>SER</td>
<td>400, 410, 411, 440, 490, 760, 800, 810, 811, 830, 840</td>
</tr>
<tr>
<td>Subject Browse</td>
<td>SU</td>
<td>600, 610, 611, 630, 650, 651, 655, 656, 658, 690, 691</td>
</tr>
<tr>
<td>Title Browse</td>
<td>TI</td>
<td>130, 222, 240-247, 440, 630, 730, 740</td>
</tr>
<tr>
<td>Web2 filters</td>
<td>Web2 Name</td>
<td>Sirsi K-12 Field</td>
</tr>
<tr>
<td>----------------------</td>
<td>------------------------------------</td>
<td>------------------------------------------------------</td>
</tr>
<tr>
<td>Collection</td>
<td>Material_filter</td>
<td>Item Group/Type</td>
</tr>
<tr>
<td>Material Type</td>
<td>Item_category1_filter</td>
<td>Material Type</td>
</tr>
<tr>
<td>Date</td>
<td>Date_filter</td>
<td>Sirsi PubYear (008 date1 or 008 date2 or 260</td>
</tr>
<tr>
<td>Language</td>
<td>Language_filter</td>
<td>Sirsi Language Policy (using subset)</td>
</tr>
<tr>
<td>Funding Source</td>
<td>Item_category2_filter</td>
<td>Funding Source</td>
</tr>
<tr>
<td>Librarian’s Choice</td>
<td>Bulletin_name_filter – currently not used</td>
<td>Librarian Reference Policy + 598 contents</td>
</tr>
<tr>
<td>Record Format</td>
<td>Format_filter – not using</td>
<td>For INFOhio only the MARC-type catalog formats</td>
</tr>
<tr>
<td>Location</td>
<td>Location_filter</td>
<td>Home Location for INFOhio always AVAILABLE</td>
</tr>
<tr>
<td>Sort Order</td>
<td>Sort_by_filter</td>
<td>Initial sorting of list, none, au, ti, su, pbyr, -pbyr</td>
</tr>
<tr>
<td>Library</td>
<td>Location_group_filter</td>
<td>Library or Search Library – replaces branch search target in Web2</td>
</tr>
</tbody>
</table>
How to enter Common USMARC Tags in Sirsi Cataloging
(Example of BOOK record listed)

Certain parts of a catalog record contain descriptive information that is transcribed from the item being cataloged. The title, for example, displays in the description much (or exactly) as it displays on the title page, although punctuated according to certain cataloging rules. Headings are text added to the descriptive portion, usually repeating and standardizing certain parts of the bibliographic information already transcribed in the descriptive text.

Just as the information on a catalog card is positioned and punctuated to certain rules, the same information on a machine-readable catalog record is arranged and delimited to similar rules. All parts of the original cataloging are retained, but certain elements are added to take advantage of machine-readable text functions. The full USMARC instructions for delimiting machine-readable cataloging are available from the Library of Congress and described in MARC Formats for Bibliographic Data.

(SEE: http://lcweb.loc.gov/marc/bibliographic/ecbdhome.html)

Examples - selecting appropriate entries (tags) for BOOK record

The bibliographic tags fall into groups.

<table>
<thead>
<tr>
<th>Group</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>010</td>
<td>tags for control numbers, call numbers, and codes</td>
</tr>
<tr>
<td>100</td>
<td>tags for main entries</td>
</tr>
<tr>
<td>200</td>
<td>tags for title information</td>
</tr>
<tr>
<td>300</td>
<td>tags for physical description</td>
</tr>
<tr>
<td>400</td>
<td>tags for series (traced and untraced)</td>
</tr>
<tr>
<td>500</td>
<td>tags for notes</td>
</tr>
<tr>
<td>600</td>
<td>tags for subject tracings</td>
</tr>
<tr>
<td>700</td>
<td>tags for added author and added title tracings</td>
</tr>
<tr>
<td>800</td>
<td>tags for series traced differently</td>
</tr>
<tr>
<td>900</td>
<td>tags defined for local use</td>
</tr>
</tbody>
</table>

Call Numbers and Control Code

010 - Library of Congress Card Number (LCCN)

Enter the LC card number in the form 99-999999 if the number is present on the card.

For information about the new LCCN four-digit year format, refer to http://lcweb.loc.gov/marc/lccn.html. This change in the structure of the LCCN will have no affect on your system. Displays of the LCCN simply show the number as entered. When cataloging, some customers may use the LCCN to set the title control number used. This too will not be affected by the change in the LCCN structure, as the system uses the LCCN as entered, other than removing spaces and some punctuation.

Example: The item contains the following LCCN: 2003-102525
The entry should look like the following entry.

010 2003102525
020 - International Standard Book Number (ISBN)

This long number (10 or 13 characters) may display on the book, either on the verso page or on the back cover. It usually displays with hyphens.

Example: The item contains the following ISBN: 0-807-22031-0 or 978-080722031-3

It should be entered in the following form (do not enter hyphens).

0807220310 or 9780807220313

More than one ISBN may display on the title record.

Example: The item contains the following ISBNS.


Insert a second 020 field for the second ISBN, third 020 field for the third ISBN. The entries should look like the following entries.

<table>
<thead>
<tr>
<th>ISBN</th>
<th>020</th>
</tr>
</thead>
<tbody>
<tr>
<td>0807220302</td>
<td></td>
</tr>
<tr>
<td>0807220310</td>
<td></td>
</tr>
<tr>
<td>9780807220313</td>
<td></td>
</tr>
</tbody>
</table>

040 - Cataloging Source

This field contains:

- Subfield a: Original cataloging agency (not repeatable)
- Subfield c: Transcribing agency (not repeatable)
- Subfield d: Modifying agency (repeatable)

Example: In the following 040 tag – if making modifications to record, enter your LC/NUC code in subfield d: (see http://www.infohio.org/UC/LOCcodes.html)

<table>
<thead>
<tr>
<th>- 040</th>
</tr>
</thead>
<tbody>
<tr>
<td>!ICrF</td>
</tr>
</tbody>
</table>

Main Entries Tags

All of the USMARC tags beginning with the number one and followed by two digits, are for main entries.

1XX - this tag and subfield a cannot be repeated. This field is subject to authority control.

100 - Personal Author Main Entry

If the creator of a book is a person, enter their name in the 100 field. The form of name used here is used in every record where this person is the main author, a contributing author, or where this person is the subject of the book. This is a heading field. Separate birth and/or death dates from the author's name by using a pipe symbol (|) followed by a lowercase letter d. This is optional. End the field with a period.
100 - Personal Name

1st indicator
0 Forename
1 Surname
2nd indicator blank

Example: The item’s main entry contains the following name.

Rowling, J. K.

The entry should look like the following entry:

100 1 Rowling, J. K.

110 – Corporate Name

1st indicator will generally be a 2 (name in direct order).
2nd indicator blank

111 – Meeting Name

1st indicator will generally be a 2 (name in direct order).
2nd indicator blank

Title Tags

245 - Main Title Entry

Every item has a title. Transcribe the title from the title page of the book into the 245 field. There is only one 245 entry in a bibliographic description. This is a descriptive text field. The 245 field has two special markers after the tag number called indicators. Indicators have a variety of uses, but the second indicator for the 245 field is a nonfiling indicator. A number from 0 - 9 entered in this position represents the number of characters before the first significant character.

NOTE: This tag and subfields a, b, c, and h cannot be repeated.

245 Title

1st indicator
0 When no 1XX tag is present
1 When a 1xx tag IS present
2nd indicator – number of non-filing characters for leading article.
The = 4 A = 2 An = 3 Les = 4

Punctuation: This tag will always end with a period.

Subfield b – if this subfield is present, the preceding subfield will end with a space followed by a colon ( :).
Subfield c – if this subfield is present, the preceding subfield will end with a space followed by a slash (/).
Additional subfields: If a subfield n (number of part) or p (name of part) is added to the 245 tag, it is added immediately after the content in a, and before h.

Punctuation for additional subfields:
- Subfield n data follows a period (.)
- Subfield p data follows a period (.) when preceded by subfield a or another subfield p.
- Subfield p follows a comma (,) when it follows subfield n.

Examples: This entry has a nonfiling indicator of 0 because no characters are skipped in order to sort this title by the first significant word "Harry".

```
245 10 Harry Potter and the Order of the Phoenix / by J.K. Rowling ; illustrations by Mary GrandPré.
```

This entry has a nonfiling indicator of 4 because the title is to be sorted by the first significant word "good"; 4 characters are skipped at the beginning of the field (T,h,e,[space] = 4).

```
245 14 The good-bye book / by Judith Viorst ; illustrated by Kay Chorao.
```

This entry has a nonfiling indicator of 2 because if this title is to be sorted by the first significant word "raisin"; 2 characters are skipped at the beginning of the field (A,[space] = 2).

```
245 12 A raisin in the sun / by Lorraine Hansberry; with a new introduction by Robert Nemiroff.
```

The 245 field may contain a statement of responsibility that displays on the title page of the cataloged item. It can be a phrase beginning with "by," "written and illustrated by," "edited by," "introd. by," "Editors:;" "with a foreword by," or the title may just be followed by the author’s name. In AACR2 cataloging rules a slash displays between the end of the title and the first portion of the statement of responsibility. If a statement of responsibility displays in the title information, separate it from the title proper, parallel titles, and subtitles by using a pipe symbol (|) plus a lowercase c.

Example: The title field contains the following lines.

A raisin in the sun / by Lorraine Hansberry; with a new introduction by Robert Nemiroff.

The entry should look like the following entry.

```
245 12 A raisin in the sun / by Lorraine Hansberry; with a new introduction by Robert Nemiroff.
```
240 - Uniform Title

If a book has a primary creator, but has a title proper that varies from the title the item is universally known by, then describe the book with this special form of title in the 240 field. The 245 field is used to record the exact form of the title as it displays on the title page, but the 240 (uniform title) ties together all versions of the same work by the same author. The form of title used here is used in every record of every version of this author's book. This is a heading field. Like the 245, this field's nonfiling indicator is in the second indicator position. For information on counting and entering nonfiling characters, refer to the preceding examples in 245 - Main Title.

Example: The main entry contains the following lines.

Dickens, Charles, d1812-1870.
[Christmas carol]
Charles Dickens's A Christmas carol /abridged by Vivian French ; illustrated by Patrick Benson.

The entries should look like the following entries.

| 100 | 1  | Dickens, Charles, d1812-1870. |
| 245 | 10 | Christmas carol. |
| 240 | 10 | Charles Dickens's A Christmas carol /abridged by Vivian French ; illustrated by Patrick Benson. |

250 - Tag for Edition Statements – this tag and subfield a cannot be repeated.

Enter edition information in the 250 field. It can be a phrase like "Rev. ed.," "1st American ed.," and "6th ed., rev. and enl. by," "[2nd ed.]," or "Ed. 15." This is a descriptive text field. Separate a statement of responsibility statement from the edition statement by using a pipe symbol (|) plus a lowercase b. This is optional.

Example: The information contains the following lines.

1st American edition

The entry should look like the following entry:

| 250 | 1st American ed. |

260 - Imprint/Publication Information Tag – this tag and subfield a can not be repeated.

The imprint information lists the place of publication, publisher, and date(s) of publication. It can also contain information about distributors and places of distribution. This is a descriptive text field. Enter this information in the 260 field in the record. The date of publication should be separated from the publisher and place of publication by a pipe symbol (|) plus a lowercase c. It is important for the subfield c to mark the first date. Separate the publisher's name from the place of publication by using a pipe symbol (|) plus a lowercase b.
Subfield a – When place is unknown enter [s.l.]

Punctuation:
- ends with space colon (:) when followed by subfield b
- ends with space semicolon (;) when followed by another a
- ends with comma (,) when it is followed by subfield c

Subfield b – When publisher/distributor is unknown enter [s.n.]

Punctuation:
- always preceded by a space and a colon (:)
- ends with comma (,) when followed by subfield c
- ends with space colon (:) when followed by another subfield b

Subfield c – Contains date of publication/distribution. If there is no date of publication but a copyright date is available, use the copyright date preceded by the letter “c” to identify it as a copyright date. (Example: |cc1965.) If the date is unknown enter within brackets as much of the date as is known. (Example: |c[19--?] |c[195-?])

Punctuation:
- always preceded by a comma (,)
- ends with a period (.)

Example: The catalog card contains the following line.


The entry should look like the following entry:


Physical Description Tags

300 - Tag for Collation

The collation lists the number of volumes or pages, notes the presence of illustrations, lists the size of the item in centimeters, and notes any accompanying material. This field is considered a descriptive text field even though it contains information not transcribed from the title page, but derived from the piece itself. Enter this information in the 300 field in the record. Separate the physical details (“illus., ports.”) from the number of pages by using a pipe symbol (|) plus a lowercase letter b. Separate the dimensions from the physical details of pages by using a pipe symbol plus a lowercase c.

Punctuation: This tag always ends with a mark of punctuation. If one is not part of the content ending the tag, provide a period.

Subfield a – Extent - Contains the number of pages and physical parts. Works that are not yet complete, only the type of unit designation is recorded, preceded by three spaces.

Punctuation:
- ends with space colon (:) when it is followed by subfield b
- ends with space semicolon (;) when it is followed by subfield c
- ends with space plus sign (+) when it is followed by subfield e
Subfield b – Other physical details
Punctuation:
- always preceded by a space and a colon ( :)
- ends with space semicolon (;) when followed by subfield c
- ends with space plus sign ( +) when followed by subfield e

Subfield c – Dimensions
Punctuation:
- always preceded by space semicolon ( ;)
- ends with space plus sign ( +) when followed by subfield e

Subfield e – Accompanying material – associated physical description statements are enclosed in parentheses.
Punctuation:
- always preceded by space plus sign ( +)

Example: For the following information:
xi, 870 p. illus., 24 cm.
The entry should look like the following entry:

| 300 | xi, 870 p. : ill. ; c24 cm. |

Series Transcription Tags

440 - Series

Enter the series in the 440 field when the title page transcription of the series name matches the library’s standard heading form, and there is a single series for all items in the series. This field is both a descriptive text field and a heading field. Do not surround the 440 field with parentheses. If there is an individual series number associated with the item, separate the series number from the series title by using a pipe symbol (|) plus a lowercase v. Like the 245, the 440 field has a nonfiling indicator in the second indicator position.

440 – This tag can be repeated but subfield a may not be repeated within the tag. Subject to authority control.

1st indicator blank
2nd indicator – number of nonfiling characters for leading article
The = 4    A = 2    An = 3    Les = 4

Subfield a – enter the seriied title exactly as it appears on the item
Subfield n – number of part of work
Subfield p – name or part of work
Subfield v – volume designation
Punctuation:
- tag does not end with mark of final punctuation unless field ends with abbreviation, an initial/letter, or other data needing mark of punctuation.
- Subfields n and p are preceded by a period (.)
- Subfield v is preceded by a space and a semicolon (;)
- no spaces used in initialisms or personal name initials/letters appearing as part of series title.

**Example:** The information contains the following line.

Ready-to-read, level 2
Reading rainbow book

The entry should look like the following entry.

| 440  | 0 | Ready-to-read, level 2 |
| 440  | 0 | Reading rainbow book |

**Tags for Notes**

**500 - General Notes**

Enter any general note(s) in the 500 (General Note) field. This tag can be repeated but you may not repeat subfield a within the tag. The field ends with a period unless another mark of punctuation is present.

**Example:** The information:

“Year 5” – spine
Sequel to Harry Potter and the goblet of fire.

The entry should look like the following entry:

| 500  |  “Year 5”--Spine. |
| 500  | Sequel to: Harry Potter and the goblet of fire. |

**504 - Bibliography Notes**

If a note refers to specific pages where a bibliography is located in the item, enter this information in 504 field. This tag can be repeated, but you may not repeat subfield a within the tag.

Punctuation: Subfield a ends with a period unless another mark of punctuation is present.

**Example:** for the following information:

Includes bibliographical references, p. 115, index, glossary

The entry should look like the following entry:

| 504  | Includes bibliographical references (p. 115), index, and glossary. |
505 - Contents Notes

If a note (usually a whole paragraph of text) begins with the word “Contents,” or lists subtitles or descriptions included in the work, enter this text in a 505 field.

505 – this tag can be repeated but you may not repeat subfield a within the tag.

1st indicator – type of contents note

0 Complete contents
1 Incomplete contents (the note is incomplete because all the parts haven’t yet been published)
2 Partial contents (the note is incomplete because the cataloger hasn’t filled it in yet; all the items of the set have been published)

2nd indicator – blank

Punctuation:

-space-hyphen-hyphen-space ( -- ) is entered between each item in the contents note.

Contents notes may contain prescribed ISBD punctuation, e.g., statements of responsibility are preceded by a space-slash-space ( / ).

-the field ends with a period when the field contains complete or partial contents (1st indicator of 0 or 2) unless another mark of punctuation is present.

-if the field contains incomplete contents (1st indicator of 1) no period is used unless the last word, initial/letter, or abbreviation ends in a period.

Example: for the following information:

Title “The wind’s twelve quarters – short stories” by Ursula LeGuin

The entry should look like the following entry.

```
505 0 Semley’s necklace -- April in Paris -- The masters -- Darnass box -- The word of unbinding -- The rule of names -- Winter’s king -- The good trip -- Nine lives -- Things -- A trip to the heap -- Vaster than empires and more slow -- The stars below -- The field of vision -- Direction of the road -- The ones who walk away from Omelas -- The day before the revolution.
```

520 - Abstract/Summary Notes

If a note (usually a whole paragraph of text) begins with the word “Summary,” and briefly describes the scope of the work or gives a plot outline, then enter this text in a 520 field. Do not enter the word “Summary” as part of the 520 field.
520 – this tag can be repeated but you may not repeat subfield a within the tag.
   1st indicator – blank
   2nd indicator – blank
Punctuation – ends with a period unless another mark of punctuation is present.

Example: Summary tag:

The entry should look like the following entry.

```
520 When the government of the magic world and authorities at Hogwarts School of
Witchcraft and Wizardry refuse to believe in the growing threat of freshly revived Lord
Voldemort, fifteen-year-old Harry Potter finds support from his loyal friends in facing
the evil wizard and other new terrors.
```

521 – Target audience

This tag can be repeated but you may not repeat subfield b within the tag.
   1st indicator
      0 Reading level
      1 Interest age level
      2 Interest grade level
      3 Special audience characteristics
   2nd indicator blank
Subfield a – Target audience note (may be repeated)
Subfield b – Source (may not be repeated)
Punctuation – ends with a period unless other punctuation is present.

Example: Target audience tag w/ Reading level and Interest age level:

```
| 521 0 6.9 |
| 521 1 008-015.1bBTSB. |
```

526 – Study Program Information Note

This tag can be repeated but you may not repeat subfields within the tag.
   1st indicator
      0 Reading program
      8 No display constant generated
Punctuation – ends with a period unless another punctuation mark is present.

Subfield a – Program name
Subfield b – Interest level
Subfield c – Reading level
Subfield d – Title point value
Subfield z – Test or quiz number
Subfield 5 – Building code for test holdings
**Example:** Reading program entry:

```
526 0 Accelerated Reader AR|bMG|c7.2|d44.0|z69785
```

**Example:** Reading program entry, *library owns test*

```
526 0 Reading Counts|b880|c5.3|d16|zQ13011|5DLHS
```

**586 – Award note**

This tag can be repeated but you may not repeat subfield a within the tag.

Punctuation – does not end with a mark of punctuation unless other data ends with a mark of punctuation.

**Example:** Award note entries:

```
586 Newbery Medal/Hcnor, 2000
586 Coretta Scott King Award, 2000
```

**6XX - Subject Tracing Tags**

**600 - Personal Subject Heading**

If a work is about a person, then a person's name is a subject heading. Enter this information in a 600 (Personal Name Subject) field.

This tag can be repeated.

1st indicator

- 0 Forename
- 1 Surname
- 3 Family Name

2nd indicator

- 4 Source not specified

Appropriate subfields:

- a – Personal name (subfield cannot be repeated within the tag)
- d – Dates associated with a name (subfield cannot be repeated within the tag)
- v – For subdivision designates a specific kind or genre of material such as “Fiction” (subfield may be repeated)
- x – General subdivision (subfield may be repeated)
- y – Chronological subdivision (subfield may be repeated)
- z – Geographic subdivision (subfield may be repeated)

**Example:** entry, person as subject:

```
600 17 Twain, Mark|d1935-1910.|2sears
```
650 - Topical Subject Heading

Tag can be repeated.

If a work is about a topic, then a topical term or group of terms will be a subject heading.

1st indicator will generally be blank
2nd indicator
4 Source not specified

Appropriate subfields:
  a – Topical term (subfield cannot be repeated within the tag)
  v – For subdivision designates specific kind or genre of material such as “Fiction” (subfield may be repeated)
  x – General subdivision (subfield may be repeated)
  y – Chronological subdivision (subfield may be repeated)
  z – Geographic subdivision (subfield may be repeated)

Example: Topical subject headings:

| 650 | 7 | Potter, Harry (Fictitious character)|vFiction.|2sears |
| 650 | 7 | Hogwarts School of Witchcraft and Wizardry (Imaginary place)|vFiction.|2sears |
| 650 | 7 | Wizards|xFiction |2sears |
| 650 | 7 | Magic|xFiction |2sears |
| 650 | 7 | School stories|2sears |

651 - Geographic Subject Heading

Tag can be repeated.

1st indicator – blank
2nd indicator
4 Source not specified

Appropriate subfields:
  a – Geographic name (subfield cannot be repeated within the tag)
  v– Form subdivision designates specific kind or genre of material such as “Fiction” (subfield may be repeated)
  x – General subdivision (subfield may be repeated)
  y – Chronological subdivision (subfield may be repeated)
  z – Geographic subdivision (subfield may be repeated)

Example: geographic subject heading:

| 651 | 7 | England|xFiction |2sears |
658 – Aligned to standards

This field can be repeated.

1st indicator blank
2nd indicator blank

Cut and paste tag content from INFOhio web site. http://www.infohio.org/librarianstaff/odeosic/
Be sure to add subfield 2 or subfield 3 per instructions.

Example: standards alignment tag:

7XX - Added Author Tracing Tags

Enter secondary creators or contributors to the production of a book in these fields according to the nature of their contribution. There is no limit to the number of added author fields used to describe an item

Punctuation – tag will end with a period

700 – Personal Name (may choose to use this tag for joint authors or contributors)

1st indicator
0 Forename
1 Surname
2nd indicator (Can be left blank)
2 Analytical entry

Subfield a – Personal name (subfield may not be repeated within tag)

Example: 700 tag entries:

| 700 | 1 | Prelutsky, Jack. |
| 700 | 1 | Smith, Lane, J. |
730 - Uniform Title

If a book has a primary creator and a standard title, but contains material from a title without a primary creator universally known by a particular form of name, then the item is described with a special added title field called the 730.

Tag can be repeated

1st indicator – number of non-filing characters for leading article
- The = 4
- A = 2
- An = 3
- Les = 4

2nd indicator – can be left blank
- 3 Analytical entry

Subfield a – Uniform title (subfield may not be repeated within the tag)

Tags for Series Traced Differently

A tag in the 800 group is only used if a 490 field is already present. The basic information in the two tags is the same: information about the individual item's series. The difference is the series information in the 490 field is transcribed from the piece, but the information in the 8XX field is reformatted to the library’s specifications for that series heading.

800 – Series Added Entry – Personal Name

Tag can be repeated.

When the title page transcription of the series name does not match the library’s standard heading form, and there is a single personal author responsible for all items in the series, then the series is entered in the 490 field, and the traced series is entered in the 800 field. The 800 field is a heading field.

1st indicator
- 0 Forename
- 1 Surname
- 3 Family name

2nd indicator – blank

Subfield a – Personal name (subfield cannot be repeated within the tag)
Subfield t – Title (subfield cannot be repeated within the tag)

Example: 800 tag entry:

```plaintext
800 1 Stine, R. L. |ItFear Street super chiller.
```

810 – Series Added Entry – Corporate Name

Tag can be repeated.

When the title page transcription of the series name does not match the library’s standard heading form, and there is a society, institution, or other permanent group responsible for all items in the series, then enter the series in the 490 field, and enter the traced series in the 810 field.
1st indicator
  0  Inverted name
  1  Jurisdiction name
  3  Name in direct order

2nd indicator blank
Subfield a – Corporate name (subfield cannot be repeated)
Subfield t – Title (subfield cannot be repeated)

811 – Series Added Entry – Meeting Name
Tag can be repeated.

1st indicator
  0  Inverted name
  1  Jurisdiction name
  3  Name in direct order
2nd indicator blank
Subfield a – Meeting name (subfield cannot be repeated)
Subfield t – Title (subfield cannot be repeated)

830 - Uniform Title
Tag can be repeated.

When the title page transcription of the series name does not match the library’s standard heading form, and there is no single entity responsible for all items in the series, enter the series in the 490 field, and enter the traced series in the 830 field.

1st indicator blank
2nd indicator – number of non-filing characters for leading article
  The = 4  A = 2  An = 3  Les = 4
(Common practice is to omit initial articles in an 830 tag. Thus second indicator values are not needed).
Subfield a – Uniform title (subfield may not be repeated within the tag)
Subfield n – Number of part/section of a work (subfield may be repeated)
Subfield p – Name of part/section of a work (subfield may be repeated)
Subfield v – Volume/sequential designation (subfield may not be repeated)
Punctuation – when creating a single entry, end the field with a period (.)
Fixed Fields

These fixed field instructions assume that your cataloging software provides a list of codes from which to select for fixed fields.

Leader:

008 The codes for the 008 tag are listed below. **Edit as indicated in bold.**

- **Date:** 030711  
  *<This date must be replaced with the current date. Enter as YYMMDD.>*
- **Date type:** s
- **Date 1:**  
  *<Enter the first date following $c in the 260 tag. If it is an estimated date, replace the unknown digits with the letter ‘u.’ Example: 19uu>*
- **Date 2**
- **Place:**  
  *<For US publications enter two-character abbreviation for state followed by “u”. Example: ohu for Ohio.>*
- **Lang:** eng
- **Mod rec:**
- **Source:** d
- **Illus:** no illustrations  
  *<Edit if appropriate.>*
- **Audience:**  
  *<Enter appropriate level.>*
- **Form/item:**  
  *<Edit if other than the usual print format.>*
- **Cont:**  
  *<May select up to four content types.>*
- **Govt pub:** not a government publication  
  *<Edit if appropriate.>*
- **Conf pub:** not a conference publication  
  *<Edit if appropriate.>*
- **Festschrift:**  
  *<Edit if appropriate.>*
- **Index:** 0  
  *<Edit if appropriate.>*
- **Lit. form:**  
  *<Enter appropriate literary form.>*
- **Bio:**  
  *<If includes biographical information, enter appropriate code.>*

**Protected fields – not overlaid when record is overlaid:**

- 505
- 521
- 526
- 590
- 593
- 594
- 595
- 597
- 598
- 599
- 658
- 690
- 691
- 856

**Note:** For more detailed information or specific questions, use HELP wizard.
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</tr>
</tbody>
</table>

Helper Buttons which may display on inventory windows.

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<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Image]</td>
<td>Replace item barcode</td>
</tr>
<tr>
<td>![Image]</td>
<td>Item lookup</td>
</tr>
<tr>
<td>![Image]</td>
<td>Select another library</td>
</tr>
<tr>
<td>![Image]</td>
<td>Refresh report list</td>
</tr>
</tbody>
</table>
Sirsí Inventory Overview
(Please refer to manual for details)

The All Inventory or My Inventory group of reports allows you to inventory items that are currently checked out, load barcode files into the system, create a list of missing items, and finalize your inventory by changing the status of items to MISSING.

**Inventory Preparation for a less problematic inventory.**

- **Before starting**, it is recommended you browse your shelves for order.
- **PreInv 1** Run the Missing Copies List report to check your current missing and contact your ITC to delete items that have been missing for a long time.
- **PreInv 2** Run the List Transit report (items you loaned) and go to Special Circulation, Pending Transits wizard (items borrowed by you) and review the location and status of any items listed. If you declare transit items as missing in the inventory process, there may be a problem with the record because of the transit status.

**Inventory Process**

1. **Set Inventory Date** report. This accounts for items checked out by adding an inventory date to the item record.

   **WARNING:** *If your library remains open, run this report again each day you scan items!*

2. **Options for entering inventory** –
   
   a. **Load Scanned Barcodes - Recommended** method for overall inventory.
      
      Step 2 - Scan barcodes into file, transfer to system using Scanner wizard.
      
      Step 2a – Run Load Scanned Barcode report to inventory items in the file. Report will also indicate items in the file with problems.

      Or

   b. Interactive method – Special Circulation – Inventory Item Wizard. **Not Recommended** for scanning entire library. Use this method for found items (Step 3b).

3. **Items NOT in Inventory** report. This is a list of Items that were not on the shelf when scanned. The items may have been missed in scanning, in another location, or possibly truly missing. Rerun this report as needed to reconcile your inventory. Use the Special Circulation – Inventory Item wizard to scan found items.

   **NOTE:** *Continue the above process for the entire library.*

   **WARNING:** *If you enter new items into your database after you start the inventory, be sure to scan them using the Inventory Item wizard before putting them on the shelf. If you don’t, they could appear on your missing items list.*
Finalizing the Inventory Process.

4. **Checkout to MISSING** report. Run this report after the entire library has been scanned. Submit this report late in the day or overnight to save process time and interruption of other reports run time.

   a. **Update Option: Be sure that the check box remains empty**: This is a list of items not found in your inventory and will be changed to a status of Missing. Check this list carefully. *(Follow documentation carefully when working with this option!)*

   b. **Update Option: Update database records. A checkmark in this check box will:**
      - **Finalize Inventory** - This will change the status of the items on the list to Missing. You will not get a list on this final run of the report. *(Follow documentation carefully when working with this option!)*

5. **Missing Copies List** report - This will give you a final list of items with current status of MISSING, both prior and after inventory.

6. **DISCARD missing items** - OPTIONAL – Contact your ITC for batch discard of MISSING items.

**NOTE:** *When viewing and/or printing inventory reports in Finished Reports, check View log*
### Set Inventory Date Report

<table>
<thead>
<tr>
<th>Date</th>
<th>Item Group</th>
<th>First Item</th>
<th>Last Item</th>
<th>File Name / Notes</th>
<th>Create Barcode File</th>
<th>Load Scanned Barcodes Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/2/06</td>
<td>Fiction</td>
<td>FIC A</td>
<td>FIC M</td>
<td>fictiona-m.txt</td>
<td>5/2/06</td>
<td>5/2/06</td>
</tr>
</tbody>
</table>

Inventory scanning completed for Item Group. Continue with Step 3.

### Complete Steps 4-5 when entire library is scanned.

<table>
<thead>
<tr>
<th>Date</th>
<th>Item Group</th>
<th>Items NOT in Inventory Report (Reconcile)</th>
<th>For found items, scan using Inventory Item Wizard</th>
<th>Checkout to Missing for LIST Update Database NO</th>
<th>Checkout to Missing to Declare Update Database Yes</th>
<th>New Missing Copies List Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/3/06</td>
<td>Fiction</td>
<td>5/3/06</td>
<td>5/3/06</td>
<td>5/30/06</td>
<td>5/30/06</td>
<td></td>
</tr>
</tbody>
</table>

In Finished Reports, when viewing and/or printing inventory reports, put check mark in the view Log box.
PreInv 1) MISSING Copies LIST Report

1. **Run** the **PreInv 1) MISSING Copies List report** (1st Time) to identify items that are currently in the MISSING, LOST or LOST-CLAIM location in the selected Item Group (or all Item Groups). These were marked MISSING, LOST, or LOST-CLAIM prior to this inventory.

   - **Basic**
   - Call Number Selection
   - Item Selection

   **WARNING:** This report will list all titles that have a Status of MISSING. It should be run as a pre-inventory report and as part of the inventory process. Adjust the report name accordingly.

   | Report name: | PreInv 1) MISSING Copies List |
   | Description: | List of items missing. |
   | Title: | Inventory: Missing Item List |
   | Footer: | |

2. **Click** the gadget for Current status and select MISSING, LOST, LOST-CLAIM.

3. **Click** the gadget for Item group and select the item group(s) or leave blank for all item groups.

**NOTE:** Library staff should check the shelves to make sure those items are really missing. If any of these items are found in a later search, scan in the items using the Inventory Item wizard.

**NOTE:** If items are found that are checked out to a special status user such as LOST or MISSING, they should also be checked in. If the home location of a found item has been modified to a location such as DISCARDED or WITHDRAWN, carefully check status information before making any change.
Sample Missing Copies List Report:

<table>
<thead>
<tr>
<th>ISBN</th>
<th>Title</th>
<th>Personal Author</th>
<th>Copy</th>
<th>ID</th>
<th>Library</th>
<th>Price</th>
<th>Cat1</th>
<th>Cat2</th>
<th>Type</th>
<th>Shelf Location</th>
<th>Created</th>
<th>Current Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>920 PAR</td>
<td>Scientist and his tools</td>
<td>Parker, Bertha</td>
<td>1</td>
<td>32612000002034</td>
<td>DLLD</td>
<td>$5.00</td>
<td>BOOK</td>
<td>UNKNOWN</td>
<td>COLLBIOG</td>
<td>AVAILABLE</td>
<td>8/25/2004</td>
<td>MISSING</td>
</tr>
<tr>
<td>920 RAZ</td>
<td>Custer and Crazy Horse</td>
<td>Razzi, Jim</td>
<td>1</td>
<td>32612000001960</td>
<td>DLLD</td>
<td>$7.95</td>
<td>BOOK</td>
<td>UNKNOWN</td>
<td>COLLBIOG</td>
<td>AVAILABLE</td>
<td>8/25/2004</td>
<td>MISSING</td>
</tr>
</tbody>
</table>
PreInv 2) List Transits Report

1. **Run** the **PreInv 2) List Transits** to identify items that are currently identified as being in transit between libraries. Item in transit can be particularly problematic during the inventory process, especially if one of the items is inadvertently omitted from the inventory process and gets identified as a missing item. In most cases, the items included on the report have already arrived at the appropriate destination and simply need to be processed via the *Receive Items in Transit* wizard.

2. On the Selection Criteria tab, **specify** the destination library if you have a particularly large school district. If you have a relatively small school district, it is recommended that you let all of the selections blank to get a report of all items in your district.

3. **Select** the sorting order that you feel would best suit your needs.

### Sample List Transits Report:

<table>
<thead>
<tr>
<th>TO</th>
<th>FROM</th>
<th>DATE</th>
<th>REASON</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alice, the cat who was hounded / Text and photographs by Jules Rosenthal. Rosenthal, Jules.</td>
<td>KAEL</td>
<td>KAHS</td>
<td></td>
</tr>
<tr>
<td>796.33 MAY copy:1</td>
<td>32617010014374</td>
<td>9/20/2006,16:12</td>
<td>LIBRARY</td>
</tr>
<tr>
<td>The Green Bay Packers. May, Julian.</td>
<td>KAEL</td>
<td>KAHS</td>
<td></td>
</tr>
<tr>
<td>F LEW copy:1</td>
<td>32617011010520</td>
<td>9/20/2006,16:12</td>
<td>LIBRARY</td>
</tr>
<tr>
<td>The horse and his boy / C.S. Lewis ; illustrated by Pauline Baynes. Lewis, C. S. (Clive Staples), 1898–1963.</td>
<td>KAEL</td>
<td>KAHS</td>
<td></td>
</tr>
</tbody>
</table>
Step 1  SET INVENTORY DATE Report

This report inventories items that are currently checked out, even if the items are checked out to a special status user, such as LOST or MISSING. The date you run this report will appear on the item record.

This report also establishes the date you need to reference when running future reports.

**WARNING:** If library is open, run before each Inventory Scanning session or upload.

Running the Report:

**Selection Criteria**
1. **Select** Library code.
2. **Select** the item group(s), leave blank for entire library or use the Excludes Selected Policies to omit an item group. Example: paperback.

**Sample Report Log**

6633 item record(s) considered.
5 item record(s) selected.
UNICORN item selection finished on Tuesday, May 1, 2006, 1:53 PM
UNICORN inventory load v2003.1 started on Tuesday, May 1, 2006, 1:53 PM

The item key and date will be read from standard input.

**WARNING:** This item is currently charged out:31633 010229616
**WARNING:** This item is currently charged out:31633 010231307
**WARNING:** This item is currently charged out:31633 010134295
**WARNING:** This item is currently charged out:31633 010164656

5 item record(s) edited.
UNICORN inventory load finished on Tuesday, May 1, 2006, 1:53 PM

**Action Steps:**

3. **MARK THIS DATE ON YOUR WORKSHEET!** You will need to refer to this date when running later reports.
4. **Run** this report each time you scan or upload your files if your library is open or if there is any activity in your database (check in, check out, adding items, etc.).

**NOTE:** The item IDs of items with a Shelf Location of AVAILABLE and a Current Status other than AVAILABLE are displayed in the report log with a warning message that the item is checked out. You may review these checked out items individually if desired.
Step 2 Begin Inventory – Scan Barcodes

Methods for inventory:

An option that is available with the Sirsi K-12 product is to transfer a file containing barcode numbers from your local computer to the server for inventory processing. This barcode file can be created in either of two ways:

A. Scanning barcodes into a file using the Notepad application (directions below)

**HINT:** Use a laptop or a computer on a cart.
- These computers do NOT need an internet connection or Sirsi on them.
- Plug in your barcode scanner from your circ computer or any scanner you have that will read the barcodes.
- Save your barcode file on a flash drive. Insert your flash drive into your Sirsi computer and save the file (or drag and drop) into a folder called Inventory 20XX (year). Put this folder where you can easily locate it.

B. Using portable data collectors (ex: PSC PT2000 (Percon), Symbol, etc.

**NOTE:** If using a portable data collector, it is recommended that users consult the scanner documentation and the regional ITC INFOhio support staff for procedures for transferring the barcodes from the scanner to your computer. Once your barcode file is created, continue following directions in this document Step 2a – Loading Scanned Barcodes.

C. **NOT recommended, but available:**

You can use the Inventory Item wizard (under Special Circulation) to scan your items interactively. However this is not recommended because:

- You must watch the screen for every item scanned to be sure the scan registered and to see any messages or alerts.
- Scanning is slower as you are dealing with network speed issues.
- You don’t get any of the Step 2a reports which will help you locate problem items or misshelved items.

If you choose to use this method, detailed directions are in Section 14.3b.
Scanning barcodes into a file using the Notepad application

1. PC - Find Notepad application on your computer: START button/All Programs /Accessories/NOTEPAD, save as text file, encoding ANSI.

2. MAC – Find TextEdit application on computer: MacIntosh HD/Applications/TEXTEDIT (Top menu, FORMAT – select “Make plain text.”)

3. When saving the barcode files on your local computer or network, create a folder named INVENTORY wherever you are instructed by your technical staff to save files. Example: E:/Inventory07

4. Name each file a short distinct name, with no special characters, for the item group you are scanning. (Save as a .txt file, encoding ANSI)

   Example: fiction.txt or nonfic100-200.txt or dvd.txt
   Example of where your files are located: E:/Inventory07/dvd.txt

5. Begin scanning item barcodes into the Notepad file. There should be a single column of barcode numbers. Check there are no blank lines before the first barcode number, anywhere in the list, and after the last barcode number. REMEMBER TO SAVE often.

   NOTE: When appending barcode data to a file that has been saved, be sure to set the cursor at the bottom of the list so that the item information will be appended correctly.
Step 2a – Load Scanned Barcodes

1. Once the file resides on the local machine, log in to Workflows.

2. Click Special Circulation Function Wizard Group.

3. Click on Scanner Wizard.

**NOTE:** Steps 4 and 5 not applicable on MAC's.

4. Select inventory device: Select the second selection in the drop-down menu (Intermec 9440 Trakker).

5. Click “Retrieve” (bottom of page).

   **NOTE:** If presented with a pop-up window, select EXIT and continue

6. When the remainder of the “Scanner” window displays, use the gadget to select the file containing the barcodes.

7. Select the appropriate library, but do NOT change the “scanner.dat” filename. Click UPLOAD. You will see a message indicating the file has been uploaded successfully.

   **NOTE:** Transfer of multiple files of barcodes in succession is permissible; select Scanner Wizard, select each file to upload until completed uploading multiple files (do as above, #6 & #7, for each file). The additional barcodes will be appended to the end of previously transferred barcodes.

After the desired barcodes have been transferred, they will need to be processed using the “Step 2a) Load Scanned Barcodes (loadbarcodes)” report found on the “All Inventory” or “My Inventory” report tab.

8. Click on the Reports Wizard Group.

9. Click on Schedule New Reports Wizard.

10. Click on My Inventory tab.

11. Click on Load Scanned Barcodes report.

12. Click Setup and Schedule.

13. From the “Item Selection” tab use the gadget to select the appropriate library.

14. Click the Run Now button at the bottom of the screen.
15. **Carefully review** the results of this report. It will include:

- Items in the barcode file that are unexpected because they are currently checked out
- Barcode numbers that are not in your database
- Mis-ordered items

---

**Items Inventoried But Checked Out**

<table>
<thead>
<tr>
<th>PROF 025.04 HOU</th>
<th>1999</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title:</strong> Decision points: Boolean logic for computer users and beginning online searchers / Janaye M. Houghton and Robert S. Houghton.</td>
<td></td>
</tr>
<tr>
<td><strong>Personal Author:</strong> Houghton, Janaye Matteson</td>
<td></td>
</tr>
<tr>
<td>**copy:**1</td>
<td>**id:**32612100064090</td>
</tr>
<tr>
<td>**cat1:**BOOK</td>
<td>**cat2:**UNKNOWN</td>
</tr>
<tr>
<td>**shelf location:**DISCARD</td>
<td>**created:**9/26/2003</td>
</tr>
<tr>
<td>**current status:**MISSING</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PROF 025.5 EIS</th>
<th>1990</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title:</strong> Information problem-solving: the Big Six Skills approach to library &amp; information skills instruction / Michael B. Eisenberg, Robert E. Berkowitz.</td>
<td></td>
</tr>
<tr>
<td><strong>Personal Author:</strong> Eisenberg, Michael B.</td>
<td></td>
</tr>
<tr>
<td>**copy:**1</td>
<td>**id:**32612100023351</td>
</tr>
<tr>
<td>**cat1:**BOOK</td>
<td>**cat2:**UNKNOWN</td>
</tr>
<tr>
<td>**shelf location:**AVAILABLE</td>
<td>**created:**9/26/2003</td>
</tr>
<tr>
<td>**current status:**CHECKEDOUT</td>
<td></td>
</tr>
</tbody>
</table>

**NOTE:** At the beginning, the following number of scanned item IDs were not found on this system: 326121

**WARNING:** This item is currently charged out:32612015000684
Scanned Items Not Found in the Catalog

Barcode ID "3261210009%939 " is not in your database. It was scanned after:
  PROF 027.8 TOO copy:1 barcode:32612100024664
Reasons, roles and realities: a hands-on seminar in resource based in
  Toor, Ruth
library:DLHS location:AVAILABLE

Barcode ID "32612023088 " is not in your database. It was scanned after:
  PROF 371.2 MEZ copy:1 barcode:32612100063944
Teaching in a block schedule
  Mezich, Jan
library:DLHS location:MISSING

Barcode ID "32617000012974 " is not in your database. It was scanned after:
  PROF 371.3 BEE copy:1 barcode:32612100023088
Secondary learning centers: an innovative approach to individualized
  Bee, Clifford P
library:DLHS location:AVAILABLE

Barcode ID " " is not in your database. It was scanned after:
  PROF W copy:1 barcode:32612000027288
  Junior Classics Vol. 4
  William, Mabel editor
library:DLLD location:AVAILABLE

Mis-ordered items are marked with "=>" and shown
between neighboring scanned items.

  PROF 371.2 DAN copy:1 barcode:32612100060502
=>PROF 371.2 JON copy:1 barcode:32612100060452
  PROF 371.2 FOG copy:1 barcode:32612100064033
           copy:1 barcode:32612100064033

  PROF 371.2 JON copy:1 barcode:32612100060452
=>PROF 371.2 FOG copy:1 barcode:32612100064033
  PROF 371.2 FOG copy:1 barcode:32612100064041
           copy:1 barcode:32612100064041

NOTE: Items in the barcode file will be inventoried as of the date/time that they are processed by this report.
Step 3a - Items NOT in Inventory Report

Run the **Items NOT in Inventory report** to get a listing of all of the items that were NOT included in the current inventory scan (possible missing items).

**NOTE:** Copies are set with a Date Inventoried by either the **Set Inventory Date report** or the **Inventory Item wizard**. The objective of this report is to obtain a list of copies that are not in the current inventory.

If you find an item on this report, use the Inventory Item wizard in the Special Circulation Function wizard group to scan the item. This will mark the item with the date as inventoried.

**NOTE:** Be sure that you have scanned all barcodes in the item group(s) being inventoried and uploaded them to the system (Step 2a). Steps 1 and 2 should be completed before running this report.

1. **Click** Item Selection tab.
2. **Click** the library gadget to select your library code.
3. **Click** the Item group gadget to **select** the item group(s) you have scanned, leave blank for entire library or bullet ‘Exclude selected policies’ to omit an item group. Example: paperback
4. **Click** on the calendar icon.
   - **Click** on Before.
   - **Select** the Date Inventoried. This is the first date you started scanning your items. It should be the first date you recorded on your Inventory Worksheet. Even if you are doing several Item Groups, always select this first date!
Example of report results (be sure to view LOG to see details):

from log:

COUNT Items Previously Inventoried but not this time:
109
COUNT Items NEVER Inventoried:
205

Report results:
INFOhio :: Titles Not in Current Inventory (invstep3)             04/22/2009
======================================================================
<table>
<thead>
<tr>
<th>Call Number</th>
<th>Barcode</th>
<th>Title</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>001.94 BIG</td>
<td>32614010158350</td>
<td>Bigfoot and other strange beasts / by AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>004.092 PAU</td>
<td>32614012003752</td>
<td>The last lecture / Randy Pausch with AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>004.8 RED</td>
<td>32614010173672</td>
<td>Adobe Photoshop CS2 revealed / Elizab AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>01.9 NAT</td>
<td>32614010160232</td>
<td>Mysteries of the ancient world AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>031 PIC</td>
<td>32614012002713</td>
<td>Pick me up : [stuff you need to know- AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>031.02</td>
<td>32614010163467</td>
<td>Guinness world records, 2006 / [edito WEeded</td>
<td></td>
</tr>
<tr>
<td>031.02 RIP</td>
<td>32614010172187</td>
<td>Ripley's believe it or not! : expect AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>031.22 GUI</td>
<td>32614010158277</td>
<td>Guinness world records 2009 / [editor AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>109 B</td>
<td>32614010136356</td>
<td>The English philosophers : from Bacon AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>150.19 JUN</td>
<td>32614010173433</td>
<td>Memories, dreams, reflections / by C. AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>190 R</td>
<td>32614000001156</td>
<td>Twentieth-century thinkers : studies AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>204 TOL</td>
<td>32614010173110</td>
<td>A new earth : awakening to your life' AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>299 H</td>
<td>32614010166148</td>
<td>Shinto / by Paula R. Hartz WEEDED</td>
<td></td>
</tr>
<tr>
<td>304.8 AND</td>
<td>32614012003554</td>
<td>Arriving at Ellis Island / Dale Ander AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>304.8 RAA</td>
<td>32614012003661</td>
<td>Ellis Island / by Lucia Raatma AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>305 DIS</td>
<td>32614013700299</td>
<td>Discrimination / Jacqueline Langwith, AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>305.235 FRE</td>
<td>32614010158665</td>
<td>The Freedom Writers diary : how a tea AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>305.48 ROD</td>
<td>32614010173193</td>
<td>Kabul Beauty School : an American wom AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>305.48 ROD</td>
<td>32614010173219</td>
<td>Kabul Beauty School : an American wom AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>306.8 WIL</td>
<td>32614010159010</td>
<td>Why can't we love them both LOST-CLAIM</td>
<td></td>
</tr>
<tr>
<td>323.4 A</td>
<td>32614000004234</td>
<td>The idea of equality : an anthology / AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>323.4 KIN</td>
<td>32614010158699</td>
<td>The words of Martin Luther King, Jr. AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>325.73 REB</td>
<td>32614012003786</td>
<td>Life on Ellis Island / by Renee C. Re AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>345.766 GRI</td>
<td>32614012004347</td>
<td>The innocent man : murder and injusti AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>362.11 CON</td>
<td>32614012003687</td>
<td>Forgotten Ellis Island : the extraord AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>362.29 BER</td>
<td>32614012004420</td>
<td>Methamphetamine / by Emma Carlson Ber AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>362.82 WAL</td>
<td>32614010172161</td>
<td>The glass castle : a memoir / Jeannet AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>362.82 WAL</td>
<td>32614010172302</td>
<td>The glass castle : a memoir / Jeannet AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>362.82 WAL</td>
<td>32614010172294</td>
<td>The glass castle : a memoir / Jeannet AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>363.12 RIF</td>
<td>32614010158384</td>
<td>The Titanic experience : the tragic s AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>364.1 LAN</td>
<td>32614000009415</td>
<td>Code name &quot;Zorro&quot; : the murder of Mar AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>378.1 STO</td>
<td>32614000001041</td>
<td>The killings at Kent State : how murd AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>394.1 SCH</td>
<td>32614012004024</td>
<td>Fast food nation : the dark side of t AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>398.2 HOR</td>
<td>32614010172666</td>
<td>Horrors! : 365 scary stories / select AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>398.2 WES</td>
<td>32614130003742</td>
<td>Medieval tales / translated and adapt AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>398.24 DUD</td>
<td>32614013700372</td>
<td>Unicorns / by William Dudley AVAILABLE</td>
<td></td>
</tr>
<tr>
<td>595.4 K</td>
<td>32614000015669</td>
<td>How to know the spiders : pictured-ke AVAILABLE</td>
<td></td>
</tr>
</tbody>
</table>
Step 3b – Using the Inventory Item Wizard

When to use this wizard:

- After running the Step 3) Items not in Inventory report, you will undoubtedly find some of the items on the list. Use this method to inventory them. It will remove them from the group of potentially missing items.
- If you add any new items to your database (SmartPort, vendor loads, etc.) after you begin your inventory, scan them using this wizard before putting them on the shelves. Otherwise, they could appear on your Missing Items list.
- Use this wizard if you chose to complete your inventory interactively. We do NOT recommend this.

1. Click on Special Circulation wizard group.
2. Click on Inventory Items Wizard.
3. Use the Inventory Item wizard and scan the barcodes on the items being inventoried.

   CAUTION: You MUST watch the workstation screen for error/alert messages.

   a) In the Identify Item window, scan each item’s barcode. You can also use the Item Lookup helper to identify items. A list of physically inventoried items appears; this list includes the call number/copy and barcode of each item.

   b) The insertion point automatically returns to the Item ID box as each item is added to the list, unless an alert/error is encountered.

   c) The Inventory Item wizard updates the Times Inventoried counter and the Date Inventoried box in the item record. An item’s inventory information displays only from the item’s platform or glossary information.

   d) If an item has a special status, an alert message appears next to the item for you to click and display more information.

   • C glossary appears for items that are checked out.
   • H glossary appears for items that are on hold for a student.
   • T glossary appears for items in transit.

   e) The List of Items Inventoried can be printed by using the Print wizard before you close the Inventory window.

   NOTE: If the system determines that the item currently should be anywhere but its shelf location, an alert message appears to indicate what should be done with the item. For example, if a user in another library put a hold on the item, the alert message will suggest that the item be put in transit to the other library to satisfy the hold.

3. When completed, click Close to exit the Inventory Item wizard.
Step 4a & 4b CHECKOUT TO MISSING Report

WARNING: You will run this report at least twice:

4a. The first time you will create a list of items that will be changed to Missing. It may be re-run as needed. Be sure to check this report LIST carefully!

4b. The second/last time will actually finalize your inventory and change the status of items in your database to MISSING.

4a. Run the Checkout to MISSING report to create a list of items that will be declared MISSING if not found in the current inventory.

1. **Click** on Schedule New Report.
2. **Click** on My Inventory or All Inventory tab.
3. **Click** on Checkout to Missing report.
4. **Call Number Selection tab:**
   a. No changes necessary.
5. **Item Selection tab:**
   a. **Select** Library if needed.
   b. **Select** the item group(s) you have inventoried or leave blank if you have completed the entire library.
   c. **Date Inventoried.** **Click** on gadget:
      • **Click** Calendar icon.
      • **Select** Before
      • **Use gadget** to select the date you began your inventory (first date on your worksheet).
      • **Click** OK.
6. **Update Options:**
   Update database records should be set to NO by leaving out the checkmark.
7. **Save Report as a template** before running it.
Checkout to Missing Report

WARNING: This list is the items that will be changed to a status of MISSING when you run this report and change the OUTPUT OPTIONS “Update database records” YES.
CHECK IT CAREFULLY!

Log shows:
Items will be selected if library is KAHS.
Items will be selected if item type is (selection)
Items will be selected if the last inventory date is earlier than 05/18/2006.

ITEM REPORT

Produced Monday, May 22, 2006 at 2:23 PM

PROF 001.4 GRO 1 1994
Title: The Grolier guide to new research methods and sources.
copy:1 id:32620000137163 library:LMHS price:$68.50
cat1:BOOK cat2:GENERAL type:PROFESSIONAL
shelf location:AVAILABLE created:8/17/2004 permanent

PROF 371.2 SCH 1996
Title: Results : the key to continuous school improvement / Mike Schmoker.
Personal Author: Schmoker, Michael J.
copy:1 id:32620000080272 library:LMHS price:$16.95
cat1:BOOK cat2:GIFT/DON type:PROFESSIONAL
shelf location:AVAILABLE created:8/17/2004 permanent

PROF 371.33 TEC 1997
Added author: Educational Resources Information Center (U.S.)
copy:1 id:32620000165925 library:LMHS price:$5.00
cat1:MICROFORM cat2:GIFT/DON type:PROFESSIONAL
shelf location:AVAILABLE created:8/17/2004 permanent

PROF 371.2 DUF 1998
Title: Professional learning communities at work : best practices for enhancing student achievement / Richard DuFour, Robert Eaker.
Personal Author: DuFour, Richard, 1947-
copy:3 id:32620000183985 library:LMHS price:$24.95
cat1:BOOK cat2:GIFT/DON type:PROFESSIONAL
shelf location:AVAILABLE created:8/17/2004 permanent

CHECK IT CAREFULLY!
Step 4b - Do this step after COMPLETING the entire library or as much as you plan on doing.

5.

Click Output Options on Template tab.

The list of changed items is NOT printed on this finalize step. This step updates your database.

All items selected in this report will have their update database records to status changed.

Change in Update database records.
Step 5  MISSINGS COPIES LIST Report

Run the Step 5 Missing Copies List report to get a complete, updated list of items that are now a status of Missing in your database. This includes all items missing prior to this inventory and the items missing after this completed inventory was finalized. You can check again for the missing materials before deciding to have them discarded.

Selection Criteria:

1. Click the gadget for Library and select your library code.

2. Click the gadget for Current status and select MISSING. (may include LOST, LOST-CLAIM).

3. Click the gadget for Item group and select the item group(s) or leave blank for all item groups.

NOTE: Library staff should check the shelves to make sure those items are really missing. If any of these items are found in a later search, scan in the items using the Check In Items wizard.

NOTE: If items are found that are checked out to a special status user such as LOST or MISSING, they should also be checked in. If the home location of a found item has been modified to a location such as DISCARDED or WITHDRAWN, carefully check status information before making any change.

4. OPTIONAL – Discard MISSING items.
   When you’re ready, NOTIFY your ITC to batch delete your MISSING items.

SAMPLE REPORT

<table>
<thead>
<tr>
<th>Copy</th>
<th>Title: Secret Mission</th>
<th>Personal Author: Levine, Ellen</th>
</tr>
</thead>
<tbody>
<tr>
<td>920</td>
<td>920 LEV</td>
<td>1988</td>
</tr>
<tr>
<td></td>
<td>Library: DLLD</td>
<td>price:$7.06</td>
</tr>
<tr>
<td></td>
<td>cat1: BOOK</td>
<td>cat2: UNKNOWN</td>
</tr>
<tr>
<td></td>
<td>shelf location: AVAILABLE</td>
<td>created:8/25/2004 permanent</td>
</tr>
<tr>
<td></td>
<td>current status:MISSING</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Copy</th>
<th>Title: Scientist and his tools</th>
<th>Personal Author: Parker, Bertha Morris</th>
</tr>
</thead>
<tbody>
<tr>
<td>920</td>
<td>920 PAR</td>
<td>1953</td>
</tr>
<tr>
<td></td>
<td>Library: DLLD</td>
<td>price:$5.00</td>
</tr>
<tr>
<td></td>
<td>cat1: BOOK</td>
<td>cat2: UNKNOWN</td>
</tr>
<tr>
<td></td>
<td>shelf location: AVAILABLE</td>
<td>created:8/25/2004 permanent</td>
</tr>
<tr>
<td></td>
<td>current status:MISSING</td>
<td></td>
</tr>
</tbody>
</table>
Discard/Delete Missing Items
(Note: ONLY ADMIN HAVE ACCESS TO THESE REPORTS)

To be done after the library staff has completed ALL Inventory steps through Step 5 including the Step 4 report that checks out the missing items to MISSING.

NOTE to ITC Staff: Both Step 6 and Step 7 reports must be run to be sure all appropriate items are changed to DISCARD. You will need to run Step 6 and Step 7 to get LOST/MISSING items marked DISCARD. And then run Step 8 to delete the DISCARD items.

Step 6 is used for items that are not "checked out", but have the status of LOST (variety of LOST statuses) or MISSING (see doc - Sec 14.6 for list of possibilities).

Step 7 is used for items that the library has marked MISSING in the Inventory process (Step 4b), or using the MARK ITEM MISSING wizard - these items are all "checked out" to the MISSING user. This report will change items with the status of MISSING to the status of DISCARD.

Step 8 is then run to remove all items with DISCARD status.

Step 6 Report – Set Copies to DISCARD

Use the Step 6) report to change the status to DISCARD for a group of items that:
- have the status of LOST and are NOT checked out.
- have been declared LOST-CLAIM via the MARK ITEM LOST wizard and are no longer connected to the patron (have been paid, or forgiven, or cancelled).
- the status of MISSING was selected manually, not via the inventory process.
- items with status of MISSING, no transaction attached.

1. Basic Tab – rename report with building in it.
2. Item Selection Tab – change library, use gadget to select statuses, select item group or make blank if all groups.
4. Save as a template.
5. Have Librarian OK this list.
6. Rerun the report from the template, changing the Update Option by checking the box.
Step 7) Report – Convert DISCARD Copies

This report will change items checked out to the MISSING user to the status of DISCARD (or possibly items checked out to the LOST user):

   HINT: Change the report name to XXX Convert DISCARD Cp (XXX = LIBRARY)

User ID Tab
• User ID: MISSING
• User ID: LOST (if items checked out to LOST user in Sirsi migration)

Call Number Selection Tab
• Number of copies >0

Item Selection Tab
• Library: XXX
• Specific Item Group can be selected; if selection is ALL item groups, leave blank.
• Specific DATE can be selected; if selection is ALL MISSING items, leave blank. If specific date range needed, select “Date last checked out” – BEFORE <date needed> or specific date range.

Update Options
• Update Database: No Check

2. Run the XXX Convert DISCARD Cp report - Listed items will be changed to status of DISCARD.

3. Run the XXX Convert DISCARD Cp report again

Update Options
• Update Database: Checked

HINT: before running this report a second time, change the report name to XXX Convert DISCARD Cp Y (will help you keep track in case of interruptions)

After the database is updated, the items should have:
• Shelf location: (AVAILABLE – or could vary - as manually set on item record)
• Current status: DISCARD.

Items now have status of DISCARD
• Next steps will DELETE items from the database.
• If library staff wants a list of items deleted, remind them to save the report on their computer.
• Inventory reports on FINISHED REPORTS tab will NOT disappear after 30 days.
Step 8) Report – Rem DISCARD by Location

This report will remove all items marked DISCARD from the database.

1. Make a template of the Step 8) Rem DISCARD by Location.

HINT: Change the report name to XXX Rem DISCARD by Loc

Item Selection Tab
- Library: XXX.
- Current status: DISCARD.
- Number of copy holds: =0.

Sorting Criteria Tab
- Call Number.

Update Options Tab
- Update Database – No Check.

Remove Items by Location Tab
- Remove all items in the designated location: Check.
- Remove title when removing last copy: Check.
- Information for each discarded copy: Check.

Print Item Tab
- Record by record Selected.
- Entry List only Selected.
- Title Info/Catalog entry list: 245,949
  - Data only Selected.
  - Call Number only Selected.
  - Brief copy information Selected.

Run the XXX Rem DISCARD by Loc report

Items still have:
- Shelf location: (AVAILABLE – or could vary – as manually set on item record)
- Current status: DISCARD
At this point, if desired, have library staff review list, save it as report of items deleted.

After library staff reviews title list and gives approval:

- **Run** the *XXX Rem DISCARD by Loc* report again.
  - Update Options to **CHANGE**: Update Database: **Check**

**HINT**: Before running it the second time, change the report name to

*XXX Rem DISCARD by Loc Y*

- Run **adutext** report.
Table of Contents
Reports
Section 15

15.1 Introduction to Reports
15.1.1 Reports Session
15.2 Schedule New Reports
15.3 Report Components
15.4 Sample Report Setup
15.5 Scheduled Reports
15.6 Finished Reports
15.7 Using Report Templates
15.8 INFOhio Reports
15.9 Custom Reports (Local)

Helper Buttons which display on report windows.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Filter and Sort Reports" /></td>
<td>Filter and Sort Reports</td>
</tr>
<tr>
<td><img src="image2.png" alt="Refresh Report" /></td>
<td>Refresh Report</td>
</tr>
<tr>
<td><img src="image3.png" alt="Display Report Scheduler Status" /></td>
<td>Display Report Scheduler Status</td>
</tr>
</tbody>
</table>
Report Session
Setting pathway to print/view reports

When you first load Sirsi on a computer, after a major software update, or if your computer has been reimaged, you will need to set your Report Session settings. You also will need to do it if you get the error message, “The specified path was not found.” when you go to view a report.

1. **Click** on the Reports wizard group.
2. **Click** on the Report Session wizard. 
   
   Set Session Settings screen displays.

   The default settings do not need to be changed except for Application to view reports and Application to print reports. They must be set on each specific computer.

3. **Set** path for Application to view reports and Application to print reports.

   - **Click** on the gadget next to the entry box.
   - **Select** the path to your Microsoft Word or AppleWorks program.

   **Gadget: Select File screen.**

   **Examples** follow – yours may be slightly different (or contact your Tech support.)

   PC – to Microsoft Word program:  
   `c:\Program Files\Microsoft Office\OFFICE11\WINWORD.EXE`

   PC – *Windows 7* users, depending on your hardware and software, you may need to use:  
   `c:\Program Files (x86)\Microsoft Office\OFFICE11\WINWORD.EXE`

   MAC – to Microsoft Word program:  
   `/Applications/Microsoft Office X/Microsoft Word`

   MAC – to TextEdit:  
   `/Applications/TextEdit.app`

4. **Click** on OK to save your settings.
Understanding Reports

Reports are available for all types of records used in your library. The following are only a few of the tasks that you can perform more easily with reports.

- Track statistical and management information by counting various staff processes to measure productivity, identifying items which are likely candidates for weeding, or tracking fund information for budgeting.
- Streamline daily library processes by creating bibliographies, sending overdue notices to users, or comparing the catalog shelflist to the items on the shelf.
- Administrative level staff can perform housekeeping tasks on the system by updating the catalog indexes, changing the status of groups of users, or removing users or items in batches when necessary.

Reports are organized into many general groups, with more specific report types within each group. You can use many reports just as they are, but the power of reports is the ability to tailor a basic report to meet your own needs.

Once a report that meets your basic needs has been selected and formatting decisions have been made, you can use the reports wizards to schedule it to run immediately, periodically, or save it as a report template to be run later. Reports can be printed, emailed, or viewed and saved.

Report Types

Count
A report of the count type answers the question, "How many meet this criteria?" such as Count Bills.

Label
A report of the label type produces information in a format conducive to printing labels, such as User Address Labels.

List
A report of the list type answers the question, "Which ones meet this criteria?" It can be a customizable report, such as List Users, but many reports are based on a list report with selections and formatting decisions already made, such as Bibliographies by Author.

Notice
A report of the notice type answers the question, "Who needs what information sent to them?" such as Hold Overdue Notices. It may select the users to receive the notice and the notice text, and may be emailed directly to users, and may automatically print address labels.

Remove
A report of the remove type permanently removes information from your system, such as Remove all Holds. Caution is advised when running reports of this type and in many cases these reports are password protected.

Statistics
A report of the statistics type typically produces tables of statistical information from your system, such as Average Price of Books.
## Report Groups

Generally, reports are grouped by the primary function, and separated by either **All** library's information or **My** library information, to distinguish between the needs at the District level as opposed to the School level. Typically, the **All** libraries groups are reports that may need to be run by the district library or school administrators. The **My** library groups are reports that are useful at the individual school level.

| Circulation | Custom | My Circulation | My Copies | My Inventory | My Notices | My Reserves | My Statistics | My Titles | User Templates | INFOhio | All Circulation | All Copies | All Inventory | All Notices | All Reserves | All Statistics | All Titles | Bibliographic |
|-------------|--------|----------------|-----------|--------------|------------|-------------|---------------|------------|----------------|---------|----------------|------------|--------------|------------|-------------|--------------|------------|---------------|-------------|---------------|

## Available Reports

The following lists are examples of the many reports available to you listed under the corresponding tabs.

### Templates

(Will list the templates you choose to create and keep for your library.)

### Bibliographic

- Added Item Labels
- Average Date of Publication
- Average Price of Books
- Call Number Labels
- Count Items
- Count Titles

### INFOhio

- CAS: Age of Collection
- CAS: Value of Collection
- CAT: Shelf List
- CIR: Active Loans
- CIR: Overdues and Notices
- CIR: Receipts
- LBL: Dumb Labels
- LBL: Item Labels
- LBL: User Labels
- PAT: List Users

### My Circulation

- Collection Status Report
- Detailed List of Overdues, Bills
- Homeroom Checkouts by Due Date
- List Checkouts by Homeroom
- List Overdues by Homeroom
- List Users with Overdues
- List Users with Bills

### My Copies

- Count Copies by Various Sorts
- Collection Development by Checkouts
- Funding Source by Various Sorts
- Weed by Last Date Checked Out
- Weed by Publication Year

### My Notices

- Combined Overdue/Bill Notices
- Individual Bill Notices
- Individual Overdue Notices
- User Announcement

### My Statistics

- Circ Count by Hour
- Daily, Monthly, Weekly and Custom Circ Counts by Various Sorts
- Total Circ Count

### My Titles

- Average Publication Year
- Average Price
- Bibliographies
- Move Copies to Another Library

### User

- Count Users
- Current User Statistics
- User Address Labels
- User ID Labels

### Custom

- OH Item Count
- OH Incremental Overdu Notices
- OH List of Overdues / Fines
- OH Monthly Circ Count
- OH Overdue Desk List
Schedule New Reports

The Schedule New Reports wizard guides you through the process of creating a "new" report.

1. **Click** on Reports Wizard Group.
2. **Click** on Schedule New Reports Wizard.

**Schedule New Reports: Display Template Reports** screen displays

3. **Click** the tabs to see lists of reports in each group. You will only see the reports you have been granted access, based on your login.

**NOTE**: The Templates tab displays a list of reports that you saved as templates. If there are no report templates saved, the tab does not display.

4. **Select** the report to run:
   a. **Click** on the selected report, the title will turn blue.
   b. **Click** on Setup & Schedule Button at the bottom of the screen.
   OR
   b. **Double click** the name of the report you wish.

**Schedule New Reports: (report name) screen displays.

**NOTE**: You create a report by selecting each tab to choose the criteria for your report.

5. **Select** Basic Information Tab.

Any of the following may be changed.
   a. Report Name: This name displays in the finished or scheduled report lists. It is also the name displaying in the new report or template list, if left unchanged.
   
   b. Description: This field describes the report results. The default value describes the report if it is run without making any changes to the selections or output options. This is also a good place to put notes to yourself about special margin settings if you’re saving it as a template.
   
   c. Title: This title 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.
d. Footer: When used, this 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. Footers are optional.

NOTE: The options you see on the tabs will vary depending on the report you select. Always use the gadget, where available, for selecting criteria.

User Selection Screen

6. User selection allows for user criteria to be added. Click on the gadget next to the entry box for your selection.

7. Common Gadget for selecting your library.
   a. Click on the appropriate selection in the left column (List to choose from). Click on the arrows to add or remove selections from the right column (List selected).
   OR
   b. Double click on your selection.

8. Sorting tab allows for sorting your report lists. Use the drop down menu to make your selection.
9. When you have the criteria for your report completed, select one of the options from the bottom of the screen:

- **Schedule** – Will allow you to schedule future dates to run.
- **Run Now** – Will run this report immediately.
- **Save As Template** – This button will allow you to save this report with your settings as a template. (Name the report to help identify the options you have chosen.)
- **Cancel** – Will cancel this report settings.

10. Select a Schedule Option if you want to run the report at a later time:

- **ASAP and Schedule** will run the report immediately.
- **Once** - This selection assumes that you want to run the report only one time, and does not save a copy of your selection.
- **Daily** - This selection is most useful for reports that are run every day or every so many days.
- **Weekly** - This selection allows you to schedule specific days of the week.
- **Monthly** - This selection allows you to schedule a report to run on a specific date or dates of the month, such as the 1st, or the 1st and 15th. If you select 31, the report will be scheduled for the actual last day of every month.
- **Send to Printer** – This selection is not currently available.
- **Save to Finished Reports Wizard** – This selection will add this run report to the Finished Reports List. The finished list accesses reports that have been run so that they may be viewed, printed, emailed, or saved as a word processing document.
- **Email to Individual(s)** – This selection will send the report by email to any email address you enter. Click the email gadget to enter the address.
- **All emails originate from** – This selection is not currently available – will always be from “sirsi”.
- **Format** – This selection is a system predefined format for the report and email. Verify that the format option boxes have a check (should always be checked unless noted in report instructions).

11. **Run Now Option** – will run the report immediately. Report screen will display with the report information. Choose your next action from the bottom buttons.

12. **Save as a Template** – will save your report settings in a template for later use.

13. **Cancel** will take you back to the Schedule New Report screen.
Report Components

Reports may consist of the following components: Basic Information, Selection Criteria, Sorting Criteria or Output Options.

**Basic Information Tab**

Basic Information is common to all reports. The following fields may have default values, but they can be edited.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Report Name</strong></td>
<td>This name displays in the finished or scheduled report lists. It is also the name displaying in the template list, if left unchanged.</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>This field describes the report results. The default value describes the report if it is run without making any changes to the Selection Criteria or Output Options tabs.</td>
</tr>
<tr>
<td><strong>Title</strong></td>
<td>This title 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.</td>
</tr>
<tr>
<td><strong>Footer</strong></td>
<td>When used, this 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. Footers are optional.</td>
</tr>
</tbody>
</table>

**Selection Criteria Tabs**

Selection Criteria allows you to pinpoint subsets of users, copies, call numbers, titles, or a number of other data types, depending on the report. In other words, it limits the amount of data that is selected to modify your output. If selection options are available and you do not make any, and/or there are no defaults, all of the data in the selection tab phase is included.

In some reports, you may determine very specific data to select, such as individual users or item IDs. You can specify the primary information you wish to select by using the selection criteria verify list, a gadget, or typing the desired information in that field in the appropriate format.

Depending on the report and its goals, these additional types of selection criteria may be available. Reports that include a particular selection group, such as bills or holds, may or may not include each of the selection items listed. When making selections, you may have the option to use a gadget to make selections based on lists or ranges, or a verify list to make a single selection.
### Checkout Selection

Reports that include a Checkout selection may or may not include all of the following selection criteria:

<table>
<thead>
<tr>
<th>Selection</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Library</td>
<td>All items in the report are held by the specified library or libraries. Use the Policy List gadget to select libraries. If no value is selected, all libraries are included.</td>
</tr>
<tr>
<td>Current Status</td>
<td>All items in the report are currently in this location. Often, this location is CHECKEDOUT for checked out items. Special status users such as LOST or MISSING may have corresponding user locations as well. Use the Policy List gadget to select locations. If no value is selected, all locations are included. <strong>NOTE:</strong> Items that are an INTRANSIT location type are not checked out to a special transit user, so they cannot be part of a checkout selection. If you want to select an item which is in transit, you must specify INTRANSIT, or your library's transit type of location, at the copy level selection for current status.</td>
</tr>
<tr>
<td>Date Checked Out</td>
<td>All items in the report were checked out on this specified date, and have not yet been returned. If no date is entered, all checked out items are included. To select a range of dates, use the Date Range gadget.</td>
</tr>
<tr>
<td>Date Due</td>
<td>All items in the report are due back in the library on this specified date. If no date is entered, all checked out items are included. To select a range of dates, use the Date Range gadget.</td>
</tr>
<tr>
<td>Overdue</td>
<td>If Yes, the report will include overdue items only. If no, all checked out items that are not overdue are included. Items are marked overdue by the Update User Delinquency Status report, which is scheduled to run nightly.</td>
</tr>
<tr>
<td>Accrued Fine</td>
<td>All checkouts in the report have accumulated fines of the amount specified for the current user. Fines are calculated by the Update User Delinquency Status report. To select a range of amounts, use the Amount Range gadget.</td>
</tr>
<tr>
<td>Date Renewed</td>
<td>All checkouts in the report were most recently renewed to the current user on the date specified. To select a range of dates, use the Date Range gadget.</td>
</tr>
<tr>
<td>Number of Renewals</td>
<td>All checkouts in the report were renewed this number of times by the current user. To select a range of numbers use the Number Range gadget.</td>
</tr>
<tr>
<td>Date Claims Returned</td>
<td>All items in the report have a &quot;claims returned&quot; date specified. This claims returned date is the date that the user to whom the item is checked out claimed the item was returned to the library. To select a range of dates, use the Date Range gadget.</td>
</tr>
<tr>
<td>Date Notice Sent</td>
<td>All items in the report most recently had a notice sent to the user on the date specified. This date is updated by overdue notices that were generated using the Count as Notice Sent option. To select a range of dates, use the Date Range gadget.</td>
</tr>
<tr>
<td>Number of Overdue Notices</td>
<td>Each item in the report has had this number overdue notices sent to the user who has the item checked out. For this number to increment automatically, you must select &quot;Count as notice sent&quot; in the Checkout Notice output options. To select a range of numbers use the Number Range gadget.</td>
</tr>
</tbody>
</table>
### Circulation Rule

All checkouts in the report are associated with an item that was circulated according to this specified Circulation Rule policy. The users who can circulate the materials and the time period of circulation are contained in the Circulation Rule. If an alternate circulation rule was used, as in Academic Reserves, the alternate circulation rule is selected. Use the Policy List gadget to select circulation rules. If no value is selected, all circulation rules are included.

### Item Selection

Reports that include an Item selection may or may not include all of the following selections.

<table>
<thead>
<tr>
<th>Library</th>
<th>All items in the report are held by the specified library or libraries. Use the Policy List gadget to select libraries. If no value is selected, all libraries are included.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shelf Location</td>
<td>All items in the report are cataloged to be in this location. Use the Policy List gadget to select locations. If no value is selected, all locations are included.</td>
</tr>
<tr>
<td>Current Status</td>
<td>All items in the report are currently in, or checked out to this location. The current status is typically the same as the shelf location, unless the item is CHECKEDOUT, or checked out to a special status user with a location such as LOST or MISSING. Use the Policy List gadget to select locations. If no value is selected, all locations are included. <strong>NOTE:</strong> Items that have a location type of INTRANSIT are not checked out to a special transit user, so they cannot be part of a checkout selection. If you want to select an item which is in transit, you must specify INTRANSIT, or your library's transit type of location, here at the copy level selection for current status.</td>
</tr>
<tr>
<td>Item Group</td>
<td>All items in the report are of this item group. Use the Policy List gadget to select item group. If no value is selected, all item groups are included.</td>
</tr>
<tr>
<td>Material Type</td>
<td>All items in the report have been designated to be of this category. Use the Policy List gadget to select a material type or types. If no value is selected, all Material Type policy names are included. <strong>NOTE:</strong> This field is not required and is used for statistical purposes only. If your library does not apply these fields consistently, or if all of the records have not been edited to include these statistical fields, you may wish to also run a report that limits by Item Group and include material type information in the formatting stage, to compare the accuracy of your results.</td>
</tr>
</tbody>
</table>
| **Funding Source** | All items in the report have been designated to be of this category. Use the Policy List gadget to select a funding source. If no value is selected, all Funding Source policy names are included.  

**NOTE:** If your library does not apply these fields consistently, or if all of the records have not been edited to include these statistical fields, you may wish to also run a report that limits by Item Group and includes funding source information in the formatting stage, to compare the accuracy of your results. |
| --- | --- |
| **Permanent** | If Yes, the items in the report are part of the cataloged collection. If no, the items in the report will include only the temporary items in your collection, such as ILL or reserve materials on loan.  

**NOTE:** Use of this field must be consistent to properly maintain temporary and permanent collections. |
| **Circulate** | Copy selection based on this circulate value depends on two factors. The Circulate field must be enabled in the item. If an item is checked out, then the Recirculate field in the User Profile to whom the item is checked out must be enabled for the item to be selected. The items selected on this flag will vary, depending upon the outstanding checkouts at any given time. If Yes, the items in the report are items that will circulate based on both the item and user characteristics. If No, the items do not circulate, based on both factors. If neither are selected, both are included. |
| **Extended Information** | If Yes, items will be selected for the report only if text is entered into the Extended Information field in the bibliographic record. If no, items with text in the Extended Information field will be rejected. If neither are selected, both are included. |
| **In the Shadow Catalog** | If Yes, the items in the report will include only those items that are "shadowed," or coded by library staff to not display publicly to student users. If no, the shadowed items will be excluded from the report results. By default, both shadowed and non-shadowed materials are selected by the report. However, both does not display as the default selection. Its function is merely to allow the restoration of the initially empty value. |
| **Number of Pieces** | This field contains the number of pieces as stated in the copy record, which reflects the number of pieces associated with a single barcode. For example, a book on tape may have four cassettes but only one barcode on the case, so it might have one, four or five, in this field, depending whether your library counts the whole thing as a unit, counts the case as an individual piece or only each of the cassettes individually. The default in this field is one. To select a range of numbers, use the Number Range gadget.  

**NOTE:** This field is not required and is used for statistical purposes only. If your library does not enter the number of pieces consistently, you may get incorrect results. |
<p>| <strong>Date Created</strong> | All items in the report were imported or created on this specified date. If no date is entered, all records are included. To select a range of dates, use the Date Range gadget. |</p>
<table>
<thead>
<tr>
<th><strong>Report Components</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Last Activity Date</strong> All items in the report indicates the date the record was last used for any one of a wide range of activities. If no date is entered, all records are included. To select a range of dates, use the Date Range gadget.</td>
</tr>
<tr>
<td><strong>Date Last Checked Out</strong> All items in the report were last checked out to a user on this specified date. If no date is entered, all records are included. To select a range of dates, use the Date Range gadget.</td>
</tr>
<tr>
<td><strong>Date Last Checked In</strong> All items in the report were last checked in from a user on this specified date. If no date is entered, all records are included. To select a range of dates, use the Date Range gadget.</td>
</tr>
<tr>
<td><strong>Date Inventoried</strong> All items in the report were inventoried on this specified date. Inventories are conducted using the Inventory Report Group or by entering the Inventory Item wizard at the workstation. If no date is entered, all records are included. To select a range of dates, use the Date Range gadget.</td>
</tr>
<tr>
<td><strong>Number of Times Inventoried</strong> All items in the report were inventoried this number of times. Inventories are conducted using the Inventory Report Group or by entering the Inventory Item wizard at the workstation. If no number is entered, all records are included. To select a range of numbers use the Number Range gadget.</td>
</tr>
<tr>
<td><strong>Number of Checkouts</strong> All items in the report currently have this number of checkouts. For most items, this number will be either zero, indicating that the item is not checked out, or one, indicating that the item is checked out. If the item recirculates, or the circulation override has been used, however, there may be more than one checkout. To select a range of numbers, use the Number Range gadget.</td>
</tr>
<tr>
<td><strong>Number of Total Checkouts</strong> Each item in the report has been checked out this number of times since it was created, as recorded in the system. If the item circulated prior to cataloging, the number of checkouts may be entered manually. To select a range of numbers, use the Number Range gadget.</td>
</tr>
<tr>
<td><strong>Number of Inhouse Checkouts</strong> Inhouse charges imply that an item was taken from the shelf and scanned with the Mark Item Used wizard prior to being reshelved, but the item was never actually charged to a user. Each item in the report has been used inhouse this number of times since it was created in Unicorn. To select a range of numbers, use the Number Range gadget.</td>
</tr>
<tr>
<td><strong>Number of Copy Holds</strong> All items in the report currently have this number of ACTIVE copy level holds, which means that the hold is placed on the specific copy, and not on the “first available” copy. To select a range of numbers, use the Number Range gadget.</td>
</tr>
<tr>
<td><strong>Available on Hold</strong> If Yes, the items in the report are currently available for pickup. If No, the report includes only those holds that are still checked out to other users or still on the shelf in libraries that cannot place holds on items on-shelf. If neither are selected, both are included.</td>
</tr>
</tbody>
</table>
### Number of Bills

All items in the report currently have this number of outstanding bills, which have not been paid, or only partially paid. To select a range of numbers, use the Number Range gadget.

### Price

All items in the report have this price listed in the item record. This amount is not necessarily the actual price paid. Usually, this amount is the price reported by the publisher along with the ISBN when the title was cataloged, if the record came from a bibliographic utility such as OCLC, or the default item price if the record was not imported or updated to reflect the actual price. To select a range of prices, use the Amount Range gadget.

### Reserve Status

This selection is only useful to libraries that have the Academic Reserves module. All items in the report have this reserve status. Only one reserve status may be selected per report. Use the verify list to select a specific reserve status. If no value is selected, all reserve statuses are included.

### Call Number Selection

The following Call Number selections may be available.

**NOTE:** *All call numbers are printed for selected titles, even if specific call number selections were made.*

<table>
<thead>
<tr>
<th>Library</th>
<th>All call numbers in the report are held by the specified library or libraries. Use the Policy List gadget to select libraries. If no value is selected, all libraries are included.</th>
</tr>
</thead>
</table>
| Call Number Range | All call numbers in the report fall within the specified call number range. Use the Call Number Range gadget to select your range. *(Remember, Call Number includes the Prefix used in your database).*  
For all 500 call numbers, enter this range: **500 - 599.99**  
For all Fiction call numbers, enter this range (depending on the prefix used in your database): **F A – F ZZZ** or **FIC A – FIC ZZZ**  
For all Easy B call numbers, enter this range (depending on the prefix used in your database): **E B – E BZZ** or **EASY B – EASY BZZ**  
Etc. *(Information about your call numbers/prefixes should be in Section 1.6a – Local Item Groups)* |
### Class Scheme

All call numbers in the report have been assigned the specified class scheme. One reason to specify a Class Scheme is to exclude call numbers that would fall within a specified range, but are not actually a part of the shelf listing that you require. For instance, the alphanumeric PERIODICAL will show up between the PE and PF titles in the Library of Congress scheme, unless only call numbers in the class scheme LC are selected. Use the gadget to select Class Schemes. If no value is selected, all Class Schemes are included.

**NOTE:** If your library has not been consistent when creating and loading catalog records to distinguish between alphanumeric and other class schemes, this option will not return the desired results.

### Number of Copies

All call numbers in the report have the specified number of copies. This is based on the actual number of copies, not the copy numbers, which may or may not reflect the actual number of copies. To select a range of numbers, use the Number Range gadget.

### Number of Call Holds

All call numbers in the report have the specified number of holds at the call number level. To select a range of numbers, use the Number Range gadget.

### Number of Copies on Reserve

This selection is only useful to libraries with the Academic Reserves module. All call numbers in the report have the specified number of copies at the reserve desk. To select a range of numbers, use the Number Range gadget.

### Shadowed

If Yes, all call numbers selected by the report are in the shadow catalog, which is searchable by staff only. If No, none of the call numbers selected by the report will be in the shadow catalog. By default, both shadowed and non-shadowed materials are selected by the report. However, both does not display as the default selection. Its function is merely to allow the restoration of the initially empty value.

### Title Selection

Reports that include a Title selection may or may not include all of the following selection criteria.

### Format

All catalog records in the report are this record format, such as SERIAL, MARC, etc. Use the gadget to select formats. If no value is selected, all formats are included.

### Date Created

All catalog records in the report were created or loaded into the catalog on this specified date. To select a range of dates, use the Date Range gadget.

**NOTE:** This date does not correspond to the date in the fixed field that indicates when the record was created in the bibliographic utility.

### Created By

All catalog records in the report were entered into the system by the specified user access. Use the String List gadget to enter a list of user accesses.
| **Date Cataloged** | All bibliographic records were cataloged on this specified date. The Date Cataloged field in the catalog record defaults to NEVER for newly created titles, and can be changed manually or when more complete cataloging is loaded. To select a range of dates, use the Date Range gadget. |
| **Date Modified** | All bibliographic records were modified on this specified date. A modification includes any Edit or Create Item command at the catalog, call number, or copy level. A match and load bibliographic record or any record value modification report that affects the item will also update the Date Modified. Creating an associated record, such as a checkout or bill, will not change the Date Modified. To select a range of dates, use the Date Range gadget. |
| **Modified By** | All catalog records in the report were modified by the specified user accesses. |
| **Publication Year** | All titles in the report have the specified publication year. The publication year is from the DATE1 element of the 008 field, if present. If no date is found, then each tag in the format with a data entry type of publication date is checked. The first non-empty tag with a data entry type of publication date will be used for the publication date. To select a range of dates, use the Date Range gadget. |
| **Number of Libraries** | All titles in the report have holdings (at least one call number) in the specified number of libraries (as defined in the Library policy). To select a range of numbers, use the Number Range gadget. |
| **Number of Call Numbers** | All bibliographic records in the report have the specified number of call numbers. Titles created without copies for ordering or memos will still have a minimum of one call number. Each volume of a multiple volume set is considered an additional call number. To select a range of numbers, use the Number Range gadget. |
| **Number of Title Holds** | All titles in the report have the specified number of holds at the title level. To select a range of numbers, use the Number Range gadget. |
| **Number of Total Holds** | All titles in the report have had the specified number of holds, including those placed at the copy, call, title, and system levels. This is a total number of holds over the life of the title, not current holds. To select a range of numbers, use the Number Range gadget. |
| **Shadowed** | If Yes, all titles selected by the report are in the shadow catalog, which is searchable by staff only. If No, none of the titles selected by the report will be in the shadow catalog. By default in most reports both shadowed and nonshadowed materials are selected by the report. However, both do not display as the default selection. Its function is merely to allow the restoration of the initially empty value. |

**User Selections**

The following User selections may be available.

<p>| <strong>Library</strong> | All users in the report are registered in the specific library or libraries. Use the gadget to select libraries. If no value is selected, all libraries are included. |
| <strong>User Profile</strong> | All users in the report have this User Profile policy value. Use the gadget to select User Profiles. If no value is selected, all users are included. |
| <strong>Grade Level</strong> | All users in the report have been designated to be of this category. Use the gadget to add or remove a Grade Level. If no value is selected, all Grade |</p>
<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Levels policies included</td>
<td>This field is not required and is used for statistical purposes only. If your library does not apply these fields consistently, or if all of the records have not been edited to include these statistical fields, you may wish to test run the report without selecting on Grade Level to compare the accuracy of your results.</td>
</tr>
<tr>
<td><strong>Job Title (not used by INFOhio at this time)</strong></td>
<td>All users in the report have been designated to be of this category. Use the gadget to add or remove a Job Title. If no value is selected, all Job Title policies are included.</td>
</tr>
<tr>
<td><strong>NOTE:</strong></td>
<td>This field is not required and is used for statistical purposes only. If your library does not apply these fields consistently, or if all of the records have not been edited to include these statistical fields, you may wish to test run the report without selecting on Job Title to compare the accuracy of your results.</td>
</tr>
<tr>
<td><strong>Department</strong></td>
<td>All users in the report belong to this Department. To enter a list of departments, use the String List gadget.</td>
</tr>
<tr>
<td><strong>NOTE:</strong></td>
<td>This field is not required and is used for statistical purposes only. If your library does not apply this field consistently, or if all of the records have not been edited to include this statistical field, you may wish to test run the report without selecting on Department to compare the accuracy of your results.</td>
</tr>
<tr>
<td><strong>Address1 Entry</strong></td>
<td>Users selected by this report will have the specified text in a specific field of the first address. To select a specific entry ID field and text, use the gadget.</td>
</tr>
<tr>
<td><strong>Address2 Entry</strong></td>
<td>Users selected by this report will have the specific text in a specific field of the second address. To select a specific entry and text, use the gadget.</td>
</tr>
<tr>
<td><strong>Address3 Entry</strong></td>
<td>Users selected by this report will have the specific text in a specific field of the third address. To select a specific entry and text, use the gadget.</td>
</tr>
<tr>
<td><strong>Date Created</strong></td>
<td>User records selected by this report were created on this specified date. To select a range of dates, use the Date Range gadget.</td>
</tr>
<tr>
<td><strong>Privilege Granted</strong></td>
<td>Each user record selected by this report was either created or had the privilege extended on this specified date. To select a range of dates, use the Date Range gadget.</td>
</tr>
<tr>
<td><strong>Privilege Exp. Date</strong></td>
<td>Users selected by this report are scheduled to have library privileges expire on this specified date. To select a range of dates, use the Date Range gadget.</td>
</tr>
<tr>
<td><strong>Last Activity Date</strong></td>
<td>User records selected by this report last had items checked out, checked in, renewed, a user billed, bill paid, user registered (the last activity date is updated to the date created), a hold placed, bookings charged or discharged, or an outreach interest searched on this specified date. To select a range of dates, use the Date Range gadget.</td>
</tr>
<tr>
<td><strong>Title</strong></td>
<td>User records selected by this report include this exact text in the Title: field. This one to four character field contains a user's title, such as Mr, Ms, or Dr, and is used primarily for addressing notices. Ending punctuation is automatically entered in the notice text and should not be included in the title field. To enter a list of titles, use the String List gadget.</td>
</tr>
<tr>
<td>-------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Extended Info</strong></td>
<td>Users selected by this report will have the specified text in a specific field of the Extended Info section. To select a specific entry ID and text, use the VED List gadget.</td>
</tr>
<tr>
<td><strong>Delinquency Status</strong></td>
<td>All users in the report are either OK, DELINQUENT, BLOCKED, or BARRED statuses. Use the Policy List gadget to add or remove a delinquency status. If no value is selected, all statuses are included.</td>
</tr>
<tr>
<td><strong>Number of Checkouts</strong></td>
<td>All users in the report currently have this number of items checked out. To select a range of numbers, use the Number Range gadget.</td>
</tr>
<tr>
<td><strong>Number of Reserve Checkouts</strong></td>
<td>This field is only useful for libraries that have the Academic Reserves module. All users in the report currently have this number of checkouts for items at the reserve desk. To select a range of numbers, use the Number Range gadget.</td>
</tr>
<tr>
<td><strong>Number of Total Checkouts</strong></td>
<td>Each user in the report has had this number of checkouts from the time the user was originally granted privileges. To select a range of numbers, use the Number Range gadget.</td>
</tr>
<tr>
<td><strong>Number of Holds</strong></td>
<td>All users in the report currently have this number of ACTIVE holds placed on items at either the copy, call, title, or system level. To select a range of numbers, use the Number Range gadget.</td>
</tr>
<tr>
<td><strong>Number of Reserves</strong></td>
<td>This field is only useful for libraries that have the Academic Reserves module. All users in the report are instructors who currently have this number of items on reserve for students. To select a range of numbers, use the Number Range gadget.</td>
</tr>
<tr>
<td><strong>Number of Claims Returned</strong></td>
<td>All users in the report have claimed to have returned items to the library this number of times since they have had privileges to use the library. To select a range of numbers, use the Number Range gadget.</td>
</tr>
<tr>
<td><strong>Number of Bills</strong></td>
<td>All users in the report have this number of outstanding bills, which are either not paid, or partially paid. To select a range of numbers, use the Number Range gadget.</td>
</tr>
<tr>
<td><strong>Number of Total Bills</strong></td>
<td>All users in the report have been billed this number of times since they have had privileges to use the library, or since the last Remove Bills, or Remove Paid Bills report affected the user record. To select a range of numbers, use the Number Range gadget.</td>
</tr>
</tbody>
</table>
Sorting Criteria 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. When making selections, you will have the option to use a verify list.

A report may list checkouts which can be sorted by call number, title/author, user ID, or user name. Results include copy information, user name, user ID, date checked out, date due, date renewed, number of renewals, number of overdue notices sent, the item’s current status and the library.

Print Item, Print User or Output Options Tab

Based on available output options, the appearance and content of reports can vary significantly. Use selections along with output options to design a report to meet your 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 very general information, which may be expanded by making additional selections in the Output Options screen area.

In notice reports, the Output Options allow you to select from the appropriate notice texts that can print in the reports. Output options may vary between notices, and occasionally, a single output selection will be provided, such as "Notice File Name" or "Test Mailer Message."

Depending on the report and its goals, these Output Options may be available. When selecting output options, you may have the option to use a gadget to make selections based on lists or ranges, or a verify list to make a single selection.
Sample Report Set Up

Schedule New Reports/Bibliographic/List Bibliography Report

The List Bibliography report is designed to create customized bibliographies by catalog, call number, or item characteristics or by structuring catalog searches using standard Boolean operators and qualifiers. In the Selection Criteria phase, use the Search String gadget to enter one or more searches. Each search line entered permits the use of Boolean operators to construct a search. The selected records for all searches combined are printed.

Only call numbers with copies are selected, by default. Results may be sorted by title/author, call number, or author/title. In Output Options, use the Print Item option to design your bibliographies. Unlike most reports, which print all call numbers for selected titles, even if specific call number selections are made, the List Bibliography report prints only selected call numbers. When the Printed Arrangement for Record by Record is selected, copy level information is read for printing. When Catalog Shelflist is selected, only catalog level information is read for printing. When Call Number shelflist is selected, both catalog and call number level information is read for printing.

Basic Information Tab

1. **Change** the Title to reflect the search phrase.

Search String Tab

1. **Click** on the search string gadget.

   **Gadget:** String List screen displays.

2. **Enter** the text for your search terms.

3. **Click** the Add button. Continue adding your search terms as needed.

4. **Click** Save.
Shadow Tab

1. **Select** the radio button to search only shadow items, no shadowed items or both shadow and non-shadowed items.

Title Selection Tab

1. **Select** the options you need to refine your search. Use the gadgets where provided. Leaving the boxes blank selects all options.

   **HINT:** Don't add any qualifiers unless they are really needed! Less is best when creating reports.

Call Number Selection Tab

1. **Select** your library code using the gadget.
2. **Select** the options you wish or leave blank to select all options.
Item Selection Criteria Tab

1. **Click** the gadget and select your library code.

2. **Select** any of the options to refine your search or leave blank to select all options. The more options selected the less likely you will retrieve large amounts of hits.

**HINT:** you may want to specify an item group, such as nonfiction.

Sorting Option Tab

1. **Click** the drop down menu and select the sorting option desired.
Print Item Tab

Printed arrangement
1. Select Call Number shelf list.

Shadow Filtering
2. Select Public and shadowed items.

Title Information
3. Select Entry list only.

4. Use the gadget to select the fields you want to display:
   - 100: author
   - 245: title
   - 260: publishing info
   - 300: physical description
   - 520: summary

Call Number Information
5. Select Call number only.

Copy Information
6. Select Brief copy information.

7. Click Run Now, choose to save the report as a template, or cancel.

HINT: If you save as a template, you can just modify the template's title and search string for future bibliographies.
With a little editing in Word, you can make the report easier to read (decrease margins, bold title, change font.)
Scheduled Reports

This wizard allows you to see a list of reports that you have scheduled to run at some point in the future.

Options:

Create – clicking here will take you to the Scheduled Reports screen where you can access the Set-up & Schedule button.

View - The View option allows you to view a scheduled report's basic information, selection, sorting, and formatting options in a text format.

Modify - The Modify option allows you to make modifications to the scheduled report. You can then schedule it or save it as a template. Saving a report as a template removes it from the scheduled list and displays the report in the Templates list instead.

Copy - The Duplicate option creates a copy of the existing scheduled report. You have the option to schedule it or to save it as a template. The original report remains in the scheduled list.

Remove - The Remove option removes reports from the schedule.

Advanced - The Advanced option enters the Advanced Management function which allows you to make changes to ownership and scheduling or to suspend the report. Only LIB1s can change ownership.

Close – exit Scheduled Reports.
Helpers:

Filter and sort reports – allows you to sort reports by owner (creator), report name, or next run date. You can also filter display to show only those for a specific owner or date.

Display Report Scheduler Status – this screen will indicate if any reports are currently running.

Refresh Report List – click on this to refresh the list of reports.

Note: For more detailed information or specific questions, use HELP wizard.
Finished Reports

The finished reports list accesses the reports that have been run so they may be viewed, printed, emailed, or saved as a word processing document.

1. Click on the Reports Wizard group.
2. Click on the Finished Report wizard.
3. Click on the report title to select the report.
4. Select one of the options from the button bar at the bottom of the screen.

NOTE: If you just want to view the report, you can double click on the name of report.

View - allows you to look at a report. When you have the report open in Word or Wordpad, you can modify as in any document.

1. Click on the name of the report in the list.
2. Click on the View Button at the bottom of the screen.
3. Select options to view.
   a. View log – will display, in the header, all the options you selected when you created the report. Sometimes the log will also give you other details, such as totals.
   b. View result – this is your report. Be sure to check this box!
   c. Format report – this will format the Sirsi reports so you can read them easily. However, if you are running an INFOhio report in RTF format, you won’t want to check this. They are already formatted.
   d. Change format button will appear if you selected Display Format Page in the Report Session settings. This will allow you to change the margins for the report if needed.
   e. Click OK when finished.

NOTE: You can have more than one finished report open at a time.

For best results, use these options to view reports.
Print – Printing directly to a printer.

1. **Click** on the name of the report in the list. The selected line will turn blue.
2. **Click** the Print button.
3. **Select** a printer. Default is PC Print.
4. **Select** “Print result and Format report.” Change format displays the page settings for change if needed.
5. **Click** OK when finished.

Email – allows you to enter an email address and send the completed report by email to someone.

1. **Click** on the name of the report in the list.
2. **Click** the Email button.
3. **Enter** a valid email address.
4. **Click** OK when finished.

**NOTE:** This will mail the complete report. If you want to email notices to individuals, you must select “Automatically Email Notices to Recipients With Email Addresses” option in the Distribute screen area when the report was scheduled. Email addresses must be part of user record.

Remove – allows you to clean up your list of reports by deleting selected reports.

1. **Click** on the Remove button.

**Finished Reports: Remove Selected Reports** screen displays.

2. **Check** the box in front of each report you wish to delete. Use Select All to remove all reports. Use Clear Selections to uncheck selected reports.
3. **Click** Remove button when finished.

Ownership – Ownership of a Finished report or a Template report can be changed from the original creator to another staff user (available for LIB1 level users only). Ownership may be changed in templates, scheduled reports and finished reports.

1. **Select** a report from the list.
2. **Click** the ownership button at the bottom of the screen.
3. Click on the owner drop down list.
4. Select the login owner from the list.

5. Other – If the user ID is not on the list, you will click the other radio button and type in the user ID (must be exact).
6. Click OK.

The user ID is now the owner of the report and it will display on their user ID reports screen, will no longer display on yours (LIB1).

Finished Reports Helpers

Filter and Sort Reports Helper
The Filter allows you to view reports for a specific date. Use the gadgets for assistance.

Report Scheduler Status Helper
This helper will display the current report being processed.

Refresh Screen Helper
This helper will refresh the screen to display the reports when they have finished processing. If your report is not displayed in the Finished Reports list, you must use this helper! It will not automatically appear when it’s done.

Fixed Format Helper
1. In the Finished reports list, select a finished report with pipe-delimited output, and click the Fixed Format Manager helper.
2. If this finished report has produced pipe-delimited files, the files will be listed in the helper window. The file name and date created is listed for each file.
3. From this list, you can do the following.
   - **View** – Select a file in the list and click **View** to display the pipe-delimited file contents in a separate window.
   - **Email** – Select a file in the list and click **Email** to email the pipe-delimited file. Use the Email Addresses gadget to specify one or more email addresses to receive the file.
   - **Remove** – Select a file in the list and click **Remove** to permanently remove the pipe-delimited file.

   **Caution:** The selected file is removed without confirmation, so make sure the file you selected is the one you want to remove. When you have finished working with pipe-delimited files, click Close.

   **NOTE:** The first time you view a report, you may see this error message. You will need to set your report properties to view reports in an application found on your computer.

1. **Click** on Reports Wizard.
2. **Right click** on Schedule New Reports wizard.
3. **Click** on Properties.
4. **Use the Gadgets** to select the correct path to the word processing program you wish to use. (May be slightly different than this example. Check with your Tech person if you have difficulty.)

   **See Section 15.1.1 for more details.**

   **Note:** For more detailed information or specific questions, use HELP wizard.
Using Report Templates

The purpose of a template is to simplify report production. Reports that you use frequently can be set up, saved as a template, and then run when desired without having to reset the parameters. Your saved templates will always be the first tab displayed when you use the Schedule New Reports wizard.

To Create a Template:

1. **Select** a report.
2. **Create** a name on the Basic Information tab that will help you identify it – ex. First grade overdues.
3. **Select** appropriate criteria to set parameters as you desire.
4. **Click** Save As a Template button at the bottom of the screen.

### Template Options

![Template Options Button](button.png)

To Run a Template report:

1. **Select** a report from the Template tab list.
2. **Click** Setup & Schedule.
3. **Select** Run Now.

To View a Template report’s criteria:

1. **Select** report from the Template list.
2. **Click** View.

This will open Word and display data similar to the report log.

- It will NOT display the finished report.
- It will NOT display the report setup screens.
- To view the completed report, you must run it and then go to the Finished Report Wizard.
To Modify a Template:

1. **Select** report from the Template list.
2. **Click** Modify.
3. **Make any changes** to criteria. Be sure to modify the name of the report also if needed.
4. **Click** OK to save your changes.

**NOTE:** **DO NOT** select Run Now. If you do, the modified report will not be saved. You need to go back to Schedule New Reports and select your revised report from the list to run it.

To Copy a Template:

This is a good way to set up similar reports with only minor changes, such as grade or teacher.

1. **Select** a report from the Template list.
2. **Click** Copy.
3. **Make any changes** to the criteria and the name of the report.
4. **Click** OK to save your changes.

To Remove a Template:

It’s a good idea to save reports as templates while you’re experimenting and trying to find one that meets your needs. However, it’s important to delete reports you don’t like to avoid confusion.

1. **Select** a report from the Template list.
2. **Click** Remove.
3. **Click** on the box next to all reports you want to remove from your Template list. Select all button will select all reports.
4. **Click** Remove for selected reports. Clear Selections will uncheck reports.
5. **Click** OK to verify.

To Schedule a Template Report:

Schedule a report to run in the future on a designated day and time.

1. **Select** the report from the Template list.
2. **Click** Set up & Schedule.
3. **Click** Schedule.
4. **Choose** the criteria to schedule the report as desired.
5. **Click** Schedule.

See Section 15.2 page 3 for detailed directions on scheduling a report.
Age of Collection

Setting up the Report

1. **Click** Schedule New Reports wizard.
2. **Select** the INFOhio tab
3. **Select** CAS: Age of Collection.
4. **Click** Setup & Schedule.

Basic Information Tab

5. **Change** the Report name and/or Title if you wish. It should reflect the content of the report.
6. **Description** is a good place to note any special print setup. If you save the report as a template, you will see this screen each time you run it.
7. **Title** appears on each page.
8. **Footer** appears at the bottom of each page (optional)

Title Selection

9. Click on the gadget to select a year before or after to limit the output. Leave blank to select all items.

Call Number Selection Tab

10. **Click** the gadget to select Library. (If Library is left blank, all buildings are reported.)
11. **Click** the gadget to select a call number range or leave blank for all call numbers.

Item Selection Tab

12. **Click** the gadgets to select options to get specific results

Output Options

13. Report Format recommended settings are shown. You may try additional combinations to meet your needs.

Spreadsheet – should be Plain Text only.

Running and saving the report

1. **Click** Run Now.
2. **Click** Finished Reports wizard.
3. **Select** report name and click View.
Value of Collection

Setting up the report

- **Click** Schedule New Reports wizard.
- **Select** the INFOhio tab
- **Select** CAS: Value of Collection.
- **Click** Setup & Schedule.

Basic Information Tab

- **Change** the Report name and/or Title if you wish. It should reflect the content of the report.
- **Description** is a good place to note any special notes to yourself. If you save the report as a template, you will see this screen each time you run it.
- **Title** appears on each page.
- **Footer** appears at the bottom of each page (optional)

Call Number Selection Tab

- Use gadgets to ensure correct formatting of data entry.
- **Select** your library. If Library is left blank, all buildings are reported.

Item Selection Tab

- **Make** selections as appropriate.
- Use gadgets to ensure correct formatting of data entry.

Output Options

- Do not make any changes. The defaults are best.

Running and saving the report

1. **Click** Run Now.
2. **Click** Finished Reports wizard.
3. **Select** report name and click View.
4. **Select** report view options:
   a. Uncheck ‘View log’.
   b. Uncheck ‘Format report’
5. **Customize** the report and/or save it if you wish.
### Sample format:

<table>
<thead>
<tr>
<th>Group</th>
<th># items</th>
<th># w/ price</th>
<th>Price Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kalida High School:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BIOGRAPHY</td>
<td>458</td>
<td>456</td>
<td>$ 4,502.02</td>
</tr>
<tr>
<td>COLLBIOG</td>
<td>101</td>
<td>101</td>
<td>$ 1,169.23</td>
</tr>
<tr>
<td>FICTION</td>
<td>2,215</td>
<td>2,199</td>
<td>$ 19,038.15</td>
</tr>
<tr>
<td>KIT</td>
<td>107</td>
<td>81</td>
<td>$ 8,795.86</td>
</tr>
<tr>
<td>NONFICTION</td>
<td>3,029</td>
<td>2,762</td>
<td>$ 29,003.33</td>
</tr>
<tr>
<td>OVERSIZED</td>
<td>76</td>
<td>76</td>
<td>$ 1,200.41</td>
</tr>
<tr>
<td>PERIODICAL</td>
<td>1,043</td>
<td>1,038</td>
<td>$ 3,551.18</td>
</tr>
<tr>
<td>PROFESSIONAL</td>
<td>110</td>
<td>110</td>
<td>$ 2,383.64</td>
</tr>
<tr>
<td>REFERENCE</td>
<td>662</td>
<td>662</td>
<td>$ 19,541.05</td>
</tr>
<tr>
<td>VERTICAL</td>
<td>101</td>
<td>101</td>
<td>$ 161.10</td>
</tr>
<tr>
<td>VIDEO</td>
<td>309</td>
<td>309</td>
<td>$ 10,017.35</td>
</tr>
<tr>
<td><strong>Library Totals:</strong></td>
<td>8,256</td>
<td>7,934</td>
<td><strong>$ 100,026.59</strong></td>
</tr>
</tbody>
</table>

Number of items with no price: 322
Number of items with price: 7,934
Average value of items with price: $ 12.61
Shelflist – Brief, Long, and Spreadsheet Formats

These reports are formatted to work with any RTF program. (Ex: Microsoft Word, Open Office (Free), AppleWorks). If using TextEdit for the MAC, you may not obtain the best results.

Setting up the report

1. **Click** Schedule New Reports wizard.
2. **Select** the INFOhio tab.
3. **Select** CAT: Shelflist
4. **Click** Setup & Schedule.

Basic Information Tab

1. **Change** the Report name and/or Title if you wish. It should reflect the content of the report.
2. **Description** is a good place to note any special print setup or margins needed. If you save the report as a template, you will see this screen each time you run it.
3. **Title** appears on each page.
4. **Footer** appears at the bottom of each page (optional)

Search String, Title Selection, Call Number Selection, Item Selection Tabs

These determine which items are included in the results.

1. **Select** options as needed – the fewer the better. You do not need to answer questions on every tab. **Always use** gadgets to ensure correct formatting of data entry.
2. **Search String** – this limits results to specific words in a record. Could be used for a bibliography.
3. **Title Selection** – allows you to limit results by creation date, cataloger, cataloging date, publication year, number of holds, shadowed status.
4. **Call Number Selection** – allows you to limit results to a call number range rather than an item group. **Leave** the default Number of copies: >0 in place.
5. **Item Selection** - Be sure to indicate your library unless you want all buildings. Other limiters include item group, status, material type, funding source, last activity date, number of checkouts, and more.

Sorting Criteria Tab

1. **Sort** as desired for brief or long formats.
Output Options Tab – For Brief, Long, or Spreadsheet Formats

This determines what information is **displayed** in the report.

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Brief</th>
<th>Long</th>
<th>Spreadsheet</th>
</tr>
</thead>
</table>

**Brief Report Type**

1. Report Format recommended settings are shown. You may try additional combinations to meet your needs.

2. Brief only allows you to select a date type. Other information is fixed – barcode, call number, status, title.

**Brief format sample (indicates Checkout Date option):**

<table>
<thead>
<tr>
<th>Chkd. Out</th>
<th>Barcode</th>
<th>Call Number Status</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>00/00/0000</td>
<td>31234567898755</td>
<td>HOL 394.261 AVAILABLE</td>
<td>MERRY CHRISTMAS BABY A CHRISTMAS</td>
</tr>
<tr>
<td>12/10/2004</td>
<td>31234567898765</td>
<td>HOL 394.266 CHECKEDOUT</td>
<td>CHRISTMAS FAVORITE LATINO AUTHORS</td>
</tr>
</tbody>
</table>

**Long or Spreadsheet Report Type**

1. Long - Report Type Format recommended settings are shown. You may try additional combinations to meet your needs. Spreadsheet – should be Plain Text only.

2. Scroll down and check any options you wish to display in your finished report.

3. Advantage of spreadsheet option is ability to open in Excel and sort data as desired.

4. If selecting spreadsheet, be sure to leave the Spreadsheet delimiter Selection on Tab.

<table>
<thead>
<tr>
<th>Spreadsheet Delimiter Selection:</th>
<th>Comma</th>
<th>Tab</th>
<th>Pipe</th>
<th>Other:</th>
</tr>
</thead>
</table>
Long format sample:

<table>
<thead>
<tr>
<th>Call Number</th>
<th>Barcode</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>HCL 394.261 M</td>
<td>312340000324079</td>
<td>MERRY CHRISTMAS BABY A CHRISTMAS AND KWANZAA</td>
</tr>
<tr>
<td>Checked Out: 00/00/0000</td>
<td></td>
<td>Mat. Type: BOOK</td>
</tr>
<tr>
<td>HCL 394.2663 C</td>
<td>312340000347602</td>
<td>CHRISTMAS FAVORITE LATINO AUTHORS SHARE THEIR</td>
</tr>
<tr>
<td>ISBN: 0375401512</td>
<td>$2</td>
<td>Publisher: New York: Knop</td>
</tr>
<tr>
<td>Checked Out: 12/10/2004</td>
<td></td>
<td>Mat. Type: BOOK</td>
</tr>
</tbody>
</table>

Running and saving the report

**Brief or Long format**

Save as a Template (optional, but helpful if you want to tweak results).

1. **Run** the report.
2. **Click** Finished Reports wizard.
3. **Select** report name and **click** View.
4. **Uncheck** View log.
5. **Uncheck** Format Report.
6. **Click** OK.

Your report will open in your pre-selected word processing program.

7. **Customize** the report and/or **save** it if you wish.
Spreadsheet format

1. Run the report using the spreadsheet option.

2. Under the Reports Wizard, click on Report Session.

3. Use the gadget to set the application to view reports in Excel.

4. Click Finished Reports wizard.

5. Select report name and click View.

6. Uncheck ‘View log’ and ‘Format report’ and click OK.

7. When you view the report, it will be in Excel and can be manipulated easily. Customize the spreadsheet and/or save it if you wish.

8. Remember to change report session back to your Word Processing program (Winword, Appleworks, Text Edit, etc…) when you’re done!

HINT: If your barcode column looks like this: 3.0499+13 you’ll need to format the cells.
- Highlight the barcode column.
- Click Format > Cells.
- On the Number Tab, select Number
- Set the decimal places to 0.

Sample Spreadsheet Format

<table>
<thead>
<tr>
<th>Item Group</th>
<th>Material Type</th>
<th>Call Number</th>
<th>Status</th>
<th>Title</th>
<th>Barcode</th>
</tr>
</thead>
<tbody>
<tr>
<td>BIOGRAPHY</td>
<td>BOOK</td>
<td>92 AAR</td>
<td>CHECKED OUT</td>
<td>Aaron / by Henry Aaron with Furman Bisher</td>
<td>32517000082761</td>
</tr>
<tr>
<td>BIOGRAPHY</td>
<td>BOOK</td>
<td>92 AAR</td>
<td>AVAILABLE</td>
<td>Hank Aaron / Jim Tackach ; introduction by Jim Murray ; senior consultant Earl Weaver / by Howard Reiser</td>
<td>32517011000638</td>
</tr>
<tr>
<td>BIOGRAPHY</td>
<td>BOOK</td>
<td>92 ABB</td>
<td>AVAILABLE</td>
<td>Jim Abbott / All-American pitcher / by Howard Reiser</td>
<td>32517010021551</td>
</tr>
<tr>
<td>BIOGRAPHY</td>
<td>BOOK</td>
<td>92 ABB</td>
<td>AVAILABLE</td>
<td>Jim Abbott / by Mark Stewart</td>
<td>32517010021559</td>
</tr>
<tr>
<td>BIOGRAPHY</td>
<td>BOOK</td>
<td>92 ABB</td>
<td>AVAILABLE</td>
<td>Jim Abbott against all odds / Ellen Emerson White</td>
<td>32517010021577</td>
</tr>
<tr>
<td>BIOGRAPHY</td>
<td>BOOK</td>
<td>92 ABB</td>
<td>AVAILABLE</td>
<td>Giant steps / Kareem Abdul-Jabbar and Peter Knobler</td>
<td>32517000082787</td>
</tr>
<tr>
<td>BIOGRAPHY</td>
<td>BOOK</td>
<td>92 ABB</td>
<td>AVAILABLE</td>
<td>From Leer Alcindor to Kareem Abdul-Jabbar / James Haskins</td>
<td>32517010021585</td>
</tr>
<tr>
<td>BIOGRAPHY</td>
<td>BOOK</td>
<td>92 AAD</td>
<td>AVAILABLE</td>
<td>The education of Henry Adams / [Henry Adams]</td>
<td>32517000082795</td>
</tr>
</tbody>
</table>
Suggested report selections:

List of items for a specific library, cataloged on a specific date, by a specific librarian
Title tab: Date modified / Modified by
Item tab: Library / Date created

List of items for any library, cataloged on a specific date, by a specific librarian
Title tab: Date modified / Modified by
Item tab: Date created

List of items for a specific library, cataloged within a specific date range, by a specific librarian
Title tab: Date modified / Modified by
Item tab: Library / Date created (range)

List of items NEVER checked out
Item tab: Library/Date last checked out

List of OLD science items in library
Title tab: Publication year (set range)
Call Number tab: Call Number range
Item tab: Library / Item group
Output options: Publication year date
Active Loans

1. **Click** Schedule New Reports wizard.
2. **Select** the INFOhio tab.
3. **Select** CIR: Active Loans.
4. **Click** Setup & Schedule.

### Basic Information Tab
- **Change** the Report name and/or Title if you wish.

### User Options
- Specific homerooms, programs, or homeschools can be selected. They must be entered exactly as they appear in patron records. You may select Active, Inactive or Both for patrons.

### User Selection
- Select your library, patron profile, grades, etc. If Library is left blank, all buildings are reported. Leave a check in the box for: blank field matches with Not Equal qualifier.

### Checkout Selection Tab
- **Click** the gadgets to select any options to limit the report. Leave library blank to list items borrowed from other libraries.

### Item Selection Tab
- **Select** your library (unless you want all libraries) and item group if desired.

### Sort Options
- **Click** the drop down menu and select your sort preference.

### Output Options
- Report Format recommended settings are shown. You may try additional combinations to meet your needs.
- Spreadsheet – should be Plain Text only.
- Insert Page Breaks on Sort Key allows you to print one page per homeroom, program, etc.
Running and saving the report

1. **Click** Run Now.
2. **Click** Finished Reports wizard.
3. **Select** report name and click View.
4. **Uncheck** View log and Format report

Sample Homeroom report, Sort by NAME:

```
<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Item ID</th>
<th>Callnum</th>
<th>Due Date</th>
<th>Room</th>
<th>Teacher</th>
<th>Grade</th>
<th>Bldg</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beard, MAXWE</td>
<td><em>Crackack</em></td>
<td>32612060000667</td>
<td>FIC CGY</td>
<td>2006-11-28</td>
<td>7C-HUBER HUBER</td>
<td>07</td>
<td>KABS</td>
<td></td>
</tr>
<tr>
<td>Burney, KYLE</td>
<td><em>Crossing the wire</em></td>
<td>32612050049919</td>
<td>FIC MGR</td>
<td>2006-11-28</td>
<td>7C-HUBER HUBER</td>
<td>07</td>
<td>KABS</td>
<td></td>
</tr>
<tr>
<td>Greene, DERF</td>
<td><em>Dangerous wishes</em></td>
<td>32612050041262</td>
<td>FIC SLE</td>
<td>2006-11-28</td>
<td>7C-HUBER HUBER</td>
<td>07</td>
<td>KABS</td>
<td></td>
</tr>
<tr>
<td>Kline, JOSUE</td>
<td><em>Identifying snakes t</em></td>
<td>32612050085665</td>
<td>FIC ROW</td>
<td>2007-09-29</td>
<td>7C-HUBER HUBER</td>
<td>07</td>
<td>KABS</td>
<td></td>
</tr>
<tr>
<td>McIlmoyle,</td>
<td><em>Harry Potter and the</em></td>
<td>32612010045459</td>
<td>920 KRA</td>
<td>2007-09-29</td>
<td>7C-HUBER HUBER</td>
<td>07</td>
<td>KABS</td>
<td></td>
</tr>
<tr>
<td>Perkins, SHA</td>
<td><em>Second stringer</em></td>
<td>32612050043250</td>
<td>FIC DYG</td>
<td>2006-12-01</td>
<td>7C-HUBER HUBER</td>
<td>07</td>
<td>KABS</td>
<td></td>
</tr>
<tr>
<td>Priebke, ZACH</td>
<td><em>Where the red fern</em></td>
<td>32612050039666</td>
<td>FIC RAW</td>
<td>2006-12-01</td>
<td>7C-HUBER HUBER</td>
<td>07</td>
<td>KABS</td>
<td></td>
</tr>
<tr>
<td>Shaw, KYLE</td>
<td>(boy from the basement)</td>
<td>32612060008582</td>
<td>FIC STA</td>
<td>2006-11-28</td>
<td>7C-HUBER HUBER</td>
<td>07</td>
<td>KABS</td>
<td></td>
</tr>
<tr>
<td>Stall, KATEH</td>
<td><em>town cats and other</em></td>
<td>32612060018184</td>
<td>FIC ALE</td>
<td>2006-11-30</td>
<td>7C-HUBER HUBER</td>
<td>07</td>
<td>KABS</td>
<td></td>
</tr>
<tr>
<td>West, JOHN</td>
<td><em>Kernbelly</em></td>
<td>32612010041383</td>
<td>E HEN AC</td>
<td>2007-09-29</td>
<td>7C-HUBER HUBER</td>
<td>07</td>
<td>KABS</td>
<td></td>
</tr>
</tbody>
</table>
```

Sample Homeroom report, Sort by CALL NUMBER:

```
<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Item ID</th>
<th>Callnum</th>
<th>Due Date</th>
<th>Room</th>
<th>Teacher</th>
<th>Grade</th>
<th>Bldg</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kline, JOSUE</td>
<td><em>Identifying snakes t</em></td>
<td>32612050006665</td>
<td>97.96 M</td>
<td>2007-03-29</td>
<td>7C-HUBER HUBER</td>
<td>07</td>
<td>KABS</td>
<td></td>
</tr>
<tr>
<td>McIlmoyle,</td>
<td><em>Daredevil do amazing</em></td>
<td>32612010045459</td>
<td>920 KRA</td>
<td>2007-09-29</td>
<td>7C-HUBER HUBER</td>
<td>07</td>
<td>KABS</td>
<td></td>
</tr>
<tr>
<td>Priebke, JERE</td>
<td><em>Donkey-Donkey</em></td>
<td>32612010018184</td>
<td>FIC ALE</td>
<td>2006-11-30</td>
<td>7C-HUBER HUBER</td>
<td>07</td>
<td>KABS</td>
<td></td>
</tr>
<tr>
<td>Stall, KATEH</td>
<td><em>town cats and other</em></td>
<td>32612050021884</td>
<td>FIC ALE</td>
<td>2006-11-30</td>
<td>7C-HUBER HUBER</td>
<td>07</td>
<td>KABS</td>
<td></td>
</tr>
<tr>
<td>West, JOHN</td>
<td><em>Kernbelly</em></td>
<td>32612060000646</td>
<td>FIC SNI</td>
<td>2007-10-10</td>
<td>7C-HUBER HUBER</td>
<td>07</td>
<td>KABS</td>
<td></td>
</tr>
<tr>
<td>Weeks, IAN</td>
<td><em>grim grotto</em></td>
<td>32612050000736</td>
<td>FIC RIT</td>
<td>2006-11-15</td>
<td>7C-HUBER HUBER</td>
<td>07</td>
<td>KABS</td>
<td></td>
</tr>
</tbody>
</table>
```

Overdues and Notices – Brief and Long Formats, Notices, and Spreadsheet Option
These reports are formatted to work with any RTF program. (Ex: Microsoft Word, Open Office (Free), AppleWorks). If using TextEdit for the MAC, you may not obtain the best results.

Setting up the Report:
1. **Click** Schedule New Reports wizard.
2. **Select** the INFOhio tab
3. **Select** CIR: Overdues and Notices.
4. **Click** Setup & Schedule.

Selections / Options

**Basic Information Tab**

1. **Change** the Report name and/or Title if you wish. It should reflect the content of the report.
2. **Description** is a good place to note any special print setup needed. If you save the report as a template, you will see this screen each time you run it.
3. **Title** appears on each page.
4. **Footer** appears at the bottom of each page (optional)

**User Options, User ID’s, User Selection, Checkout Selection, Bill Selection Tabs**

1. **User Options** – specific homerooms, programs, or homeschools can be selected. They must be entered exactly as they appear in patron records. You may select Active, Inactive or Both for Students.
2. **User Ids** – You can enter specific ID numbers to run for select patrons.
3. **User Selection** – indicate your library, patron profile, grades, etc. If Library is left blank, all buildings are reported. Leave a check in the box for: blank field matches with Not Equal qualifier.
4. **Checkout Selection** – limits output to a specific library, date or date range. You may select only Overdues, No overdues or Both.
5. **Bill Selection** – limits output to a specific library, date, or amount of bill.
6. **Use** gadgets to ensure correct formatting of data.

**NOTE:** Consult user record to verify where and how data is entered.
Sorting Tab

1. Select sort from drop-down menu and select your sorting preference. (Example: Library/room/name will sort by homeroom, last name.) Sorting by call number has also been added.

Output Options Tab

Select Brief, Long or Notices. Options vary for each type. Unavailable options are grayed out. Choose as many options as you wish.

Brief Report

1. Report Format recommended settings are shown. You may try additional combinations to meet your needs.

2. Select either the full 14 digit user ID or the Alt-ID to display.

3. You may check just Overdues, just Unpaid bills (fines), or both.

4. Start New Page on Sort Key allows you to print one page per homeroom, program, etc.

5. Print Options for PC or MAC will be grayed out if this report format is preset to work with either type of computer.

Sample Brief Reports

Overdues and Unpaid Bills checked.

Overdues, Unpaid Bills, and Total Bills and Charges checked.
Long Report

1. Report Format recommended settings are shown. You may try additional combinations to meet your needs.

2. User ID Selection - Select either the full 14 digit user ID or the Alt-ID to display on the finished report.

3. Start New Page on Sort Key allows you to print one page per homeroom, program, etc.

4. You can enter a message to be included for each student if desired (mini-notice), or leave message area blank for a list.

5. Select as many Field Selection Options as you wish to display on the finished report.

Sample Long Report

Sample Long Report with Message
Notices

1. Report Format recommended settings are shown. You may try additional combinations to meet your needs.

2. User ID Selection - Select either the full 14 digit user ID or the Alt-ID to display on the finished report.

3. You may print 2 notices per page.

4. Select PC or Mac for this report.

5. You may enter a message to be included for each student if desired.

6. Select as many Field Selection Options as you wish to display on the finished report.

7. a. If you select Item: Estimated Fines, you may also select for the following message to appear (7b):

   **NOTE:** The fine amount displayed with OVERDUE items, is as of mm/dd/yyyy. Overdue fines will increase each day until the item has been returned.

8. You have the option to email notices to students. However, there must be a valid email address in the student’s record.
Running the Report

Save as a Template (optional, but helpful if you want to tweak results).

1. **Run** the report.
2. **Click** Finished Reports wizard.
3. **Select** report name and **click** View.
4. **Uncheck** View log.
5. **Uncheck** Format report.
6. **Click** OK. Your report will open in your pre-selected word processing program.
7. **Customize** the report and/or **save** it if you wish.

Spreadsheet Option

1. **Run** the report using the spreadsheet option.
2. Under the Reports Wizard, **click** on Report Session.
3. **Use** the gadget to set the application to view reports in Excel.
4. **Click** Finished Reports wizard.
5. **Select** report name and **click** View.
6. **Uncheck** ‘View log’ and ‘Format report’ and **click** OK.
7. When you view the report, it will be in Excel and can be manipulated easily. **Customize** the spreadsheet and/or save it if you wish.
8. Remember to **change** report session back to your Word Processing program (Winword, Appleworks, Text Edit, etc…) when you’re done!

**HINT:** If your barcode column looks like this: 3.0499+13 you’ll need to format the cells.
- **Highlight** the barcode column.
- **Click** Format > Cells.
- On the Number Tab, **select** Number
- **Set** the decimal places to 0.
Sample spreadsheet:

<p>| | | | | | | | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>B</td>
<td>C</td>
<td>D</td>
<td>E</td>
<td>F</td>
<td>G</td>
<td>H</td>
<td>I</td>
<td>J</td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>1</td>
<td>Bill/Charge</td>
<td>Patron Barcode</td>
<td>Name</td>
<td>Teacher</td>
<td>Patron Grade</td>
<td>Title</td>
<td>Item Barcode</td>
<td>Callnum</td>
<td>Author</td>
<td>Due Date</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>C</td>
<td>22512001119953</td>
<td>FRYE, PHILLIP (OSBURN</td>
<td></td>
<td></td>
<td>7 Ghosts be 3.2E+13 F JON RC</td>
<td>Jones, Ma</td>
<td>8/29/2007</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>C</td>
<td>22512001113006</td>
<td>GOODWIN, KELSOSBURN</td>
<td></td>
<td></td>
<td>7 Abigail Ad 3.2E+13 RC 620</td>
<td>Wagner,</td>
<td>8/29/2007</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>C</td>
<td>22512001113006</td>
<td>GOODWIN, KELSOSBURN</td>
<td></td>
<td></td>
<td>7 Changes ft 3.2E+13 RC 660</td>
<td>Tripp, Yal</td>
<td>8/29/2007</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>C</td>
<td>22512001113253</td>
<td>HARSHMAN, TYLTUTTLE</td>
<td></td>
<td></td>
<td>7 Sing a son 3.2E+13 E SIL</td>
<td>Silvers, Vir</td>
<td>8/29/2007</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>B</td>
<td>MISSING</td>
<td>Missing Items - DO NOT DELETE</td>
<td></td>
<td></td>
<td>7 Skin deep 3.2E+13 FIC RUB</td>
<td>Ruby, Lot</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>C</td>
<td>22512001110002</td>
<td>SMITH, PAIGE BAUMAN</td>
<td></td>
<td></td>
<td>7 Big Frog, L 3.2E+13 E MEN</td>
<td>Mendoza,</td>
<td>8/29/2007</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>C</td>
<td>22512001119868</td>
<td>VANDYKE, CHRISTUTTLE</td>
<td></td>
<td></td>
<td>7 Tracing ou 3.2E+13 973 SIL</td>
<td>Silver, Led</td>
<td>8/29/2007</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>C</td>
<td>22512001125752</td>
<td>ABRAM, KAILITY HODLERIN</td>
<td></td>
<td></td>
<td>4 Ricky Ric 3.2E+13 RC 490</td>
<td>Pilkey, Da</td>
<td>10/21/2006</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>C</td>
<td>22512001124456</td>
<td>ARNOLD, JACO SOMMERS</td>
<td></td>
<td></td>
<td>5 Diamond mid 3.2E+13 RC 710</td>
<td>Funk, Co</td>
<td>10/23/2006</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>B</td>
<td>22512001700000</td>
<td>BACKUS, JARREGERDING</td>
<td></td>
<td></td>
<td>2 Captain Ur 3.2E+13 FIC PIL RC</td>
<td>Pilkey, Co</td>
<td>10/17/2007</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>B</td>
<td>22512001410481</td>
<td>BACKUS, JORENGROCH</td>
<td></td>
<td></td>
<td>3 Captain Ur 3.2E+13 FIC PIL RC</td>
<td>Pilkey, Co</td>
<td>11/27/2006</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>C</td>
<td>22512001500202</td>
<td>BANKS, DAMION SWICK</td>
<td></td>
<td></td>
<td>4 Harry Potti 3.2E+13 FIC ROW</td>
<td>Rowling,</td>
<td>11/20/2006</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>C</td>
<td>22512001800208</td>
<td>BENNETT, MIKA WIECHART</td>
<td></td>
<td></td>
<td>1 Rosie's Wh 3.2E+13 RC 100</td>
<td>Hutchins,</td>
<td>11/21/2006</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>C</td>
<td>22512001600354</td>
<td>BLAND, NATHANSUEVER</td>
<td></td>
<td></td>
<td>1 500 Hats c 3.2E+13 RC 520</td>
<td>Seuss, Dr</td>
<td>11/21/2006</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>C</td>
<td>22512003333572</td>
<td>BOHN, KIMBERLY UNKNOWN</td>
<td>FACULTY</td>
<td></td>
<td>1 Crabbev 3.2E+13 FAC DEV</td>
<td>Byers, Wa</td>
<td>12/25/2007</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Receipts

Setting up the report

1. **Click** Schedule New Reports wizard.
2. **Select** the INFOhio tab.
3. **Select** CIR: Receipts.
4. **Click** Setup & Schedule.

Basic Information Tab

- **Change** the Report name and/or Title if you wish.

Selection (User Options, User ID’s, User Selection, Bill Selection) Tabs

- **User Options** – specific homerooms or programs can be selected. They must be entered exactly as they appear in patron records.
- **User Ids** – you can enter specific ID numbers if you only want to run report for a few patrons.
- **User Selection** – indicate your library, patron profile, grades, etc. If Library is left blank, all buildings are reported. Leave the check in the box by “blank field matches with Not Equal qualifier.
- **Bill Selection** – allows you to limit by library, date ranges and/or amount of fines owed. If Payment date is left blank, results are from BEGINNING of system (date migrated)
- **Use** gadgets to ensure correct formatting of data entry.

Sorting Criteria Tab

1. **Select** sort/option from drop-down menu.

Output Options Tab

1. **Leave** default at RTF.

Running and saving the report

1. **Click** Run Now.
2. **Click** Finished Reports wizard.
3. **Select** report name and click View.
4. **Select** report view options: uncheck ‘View log’.
5. **Customize** the report and/or save it if you wish.
Sample format:

<table>
<thead>
<tr>
<th>Library</th>
<th>Pmt. Type</th>
<th>Barcode</th>
<th>Name</th>
<th>Date</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>LIB</td>
<td>CANCEL</td>
<td>22931000120995</td>
<td>Johns, SHELBI</td>
<td>11/17/2005</td>
<td>0.02</td>
</tr>
<tr>
<td></td>
<td></td>
<td>22931000150695</td>
<td>Johnson, CHRISTIAN</td>
<td>05/31/2005</td>
<td>0.36</td>
</tr>
<tr>
<td></td>
<td></td>
<td>22931000130895</td>
<td>Smith, JACOB</td>
<td>12/07/2005</td>
<td>0.14</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>CANCEL Total:</td>
<td></td>
<td></td>
<td></td>
<td>0.52</td>
</tr>
<tr>
<td></td>
<td>CASH</td>
<td>22931000120011</td>
<td>Abba, REBECCA</td>
<td>05/04/2005</td>
<td>0.10</td>
</tr>
<tr>
<td></td>
<td></td>
<td>22931000160099</td>
<td>Arther, CHANDLER</td>
<td>09/19/2005</td>
<td>0.04</td>
</tr>
<tr>
<td></td>
<td></td>
<td>22931000120029</td>
<td>Bowler, MACKENZIE</td>
<td>05/31/2005</td>
<td>0.16</td>
</tr>
<tr>
<td></td>
<td></td>
<td>22931000150661</td>
<td>Young, JOHNNY</td>
<td>04/04/2005</td>
<td>0.02</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>03/01/2005</td>
<td>0.04</td>
</tr>
<tr>
<td></td>
<td>CASH Total:</td>
<td></td>
<td></td>
<td></td>
<td>0.36</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>CHECK Total:</td>
<td></td>
<td></td>
<td></td>
<td>12.55</td>
</tr>
<tr>
<td></td>
<td>FORGIVEN</td>
<td>22931000120029</td>
<td>Black, MACKENZIE</td>
<td>03/03/2005</td>
<td>0.02</td>
</tr>
<tr>
<td></td>
<td></td>
<td>22931000140027</td>
<td>Jones, BEN</td>
<td>09/12/2005</td>
<td>0.02</td>
</tr>
<tr>
<td></td>
<td></td>
<td>22931000120995</td>
<td>Smith, SHELBI</td>
<td>09/20/2005</td>
<td>0.10</td>
</tr>
<tr>
<td></td>
<td></td>
<td>22931000130069</td>
<td>White, ALLISON (ALLI)</td>
<td>03/29/2005</td>
<td>0.02</td>
</tr>
<tr>
<td></td>
<td>FORGIVEN Total:</td>
<td></td>
<td></td>
<td></td>
<td>0.16</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Grand Total:</td>
<td></td>
<td></td>
<td></td>
<td>13.59</td>
</tr>
</tbody>
</table>
PAT List Users – Brief, Long, and Spreadsheet Formats

These reports are formatted to work with any RTF program. (Ex: Microsoft Word, Open Office (Free), AppleWorks). If using TextEdit for the MAC, you may not obtain the best results.

Setting up the Report:
1. **Click** Schedule New Reports wizard.
2. **Select** the INFOhio tab.
3. **Select** PAT: List Users.
4. **Click** Setup & Schedule.

**Basic Information Tab**
1. **Change** the Report name and/or Title if you wish. It should reflect the content of the report.
2. **Description** is a good place to note any special print setup. If you save the report as a template, you will see this screen each time you run it.
3. **Title** appears on each page.
4. **Footer** appears at the bottom of each page (optional)

**Selection Options**
1. **User Options** – specific homerooms, homeschools, or programs can be selected. They must be entered exactly as they appear in patron records. Use the gadget to Enter String.
2. **User IDs** – enter ID numbers to limit output to a specific users.
3. **User Selection** – indicate your library, patron profile, grades, etc. If Library is left blank, all buildings are reported.
4. **User Status Selection** – allows you to limit by user status and/or amount of fines owed.
5. **Use** the gadgets to ensure correct formatting of data entry.

Basic Information Tab

<table>
<thead>
<tr>
<th>Report name:</th>
<th>KAHS students spreadsheet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description:</td>
<td>Open in Excel</td>
</tr>
<tr>
<td>Title:</td>
<td>List of Patrons 06-07</td>
</tr>
<tr>
<td>Footer:</td>
<td></td>
</tr>
</tbody>
</table>

Selection Options

Basic Information Tab

<table>
<thead>
<tr>
<th>Basic</th>
<th>User Options</th>
<th>User IDs</th>
<th>User Selection</th>
<th>User Status Selection</th>
<th>Sorting</th>
<th>Output Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Users</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Schedule New Reports : Schedule PAT : List Users

<table>
<thead>
<tr>
<th>Basic</th>
<th>User Options</th>
<th>User IDs</th>
<th>User Selection</th>
<th>User Status Selection</th>
<th>Sorting</th>
<th>Output Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Users</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Gadget: String List

<table>
<thead>
<tr>
<th>Homeroom:</th>
<th>Homeschool:</th>
<th>Program:</th>
<th>User Status:</th>
<th>User Selection:</th>
</tr>
</thead>
<tbody>
<tr>
<td>203</td>
<td>201, 202</td>
<td></td>
<td>Active</td>
<td>Active, Inactive</td>
</tr>
</tbody>
</table>

Add, OK, Remove, Cancel
Sorting
1. Use the drop down menu to select the type of sorting.

Output Options Tab – For Brief, Long, or Spreadsheet Formats

Brief Report
1. Report Format recommended settings are shown. You may try additional combinations to meet your needs.
2. Only preset information is available for the Brief report.

Sample Brief Report

<table>
<thead>
<tr>
<th>Barcode</th>
<th>Name</th>
<th>Libr</th>
<th>Created</th>
<th>Room</th>
<th>Teacher</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>21234000070195</td>
<td>HARRIS, DONALD L</td>
<td>ELMHS</td>
<td>20050603</td>
<td>RM 201</td>
<td>DENTON</td>
<td>09</td>
</tr>
<tr>
<td>21234000175671</td>
<td>JOHNSTON, JAN L</td>
<td>ELMHS</td>
<td>20050603</td>
<td>RM 201</td>
<td>DENTON</td>
<td>09</td>
</tr>
<tr>
<td>21234000153025</td>
<td>LARSON, CHERYL N</td>
<td>ELMHS</td>
<td>20050603</td>
<td>RM 201</td>
<td>DENTON</td>
<td>09</td>
</tr>
</tbody>
</table>

Long or Spreadsheet Report
1. Long - Report Format recommended settings are shown. You may try additional combinations to meet your needs. Spreadsheet – should be Plain Text only.
2. Check any options you wish to display in your finished report.
3. Advantage of spreadsheet option is ability to open in Excel and sort data as desired.
4. If selecting spreadsheet, be sure to leave the Spreadsheet delimiter Selection on Tab.

Spreadsheet Delimiter Selection:
- Comma
- Tab
- Pipe
- Other:
Sample Long Format

<table>
<thead>
<tr>
<th>Barcode</th>
<th>Name</th>
<th>Libr</th>
<th>Created</th>
<th>Room</th>
<th>Teacher Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>21234000070195</td>
<td>HARRIS, DONALD L</td>
<td>ELMH</td>
<td>20050603</td>
<td>RM 201</td>
<td>DENTON 09</td>
</tr>
<tr>
<td>Address: 42700 BELLAIRE</td>
<td>City: ELMH</td>
<td>State: OH</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zip: 44129</td>
<td>Balance: 20.00</td>
<td>Bills: 2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>212340001769671</td>
<td>JOHNSTON, STAN L</td>
<td>ELMH</td>
<td>20050603</td>
<td>RM 201</td>
<td>DENTON 09</td>
</tr>
<tr>
<td>Address: 41220 ELXSEE AV</td>
<td>City: ELMH</td>
<td>State: OH</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zip: 44129</td>
<td>Balance: 0.00</td>
<td>Bills: 0</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Sample Spreadsheet Format

<table>
<thead>
<tr>
<th>1</th>
<th>Barcode</th>
<th>Name</th>
<th>Profile</th>
<th>Room</th>
<th>Teacher</th>
</tr>
</thead>
<tbody>
<tr>
<td>265</td>
<td>22617000015581</td>
<td>WARNIMONT, BLAINE</td>
<td>STUDENT1</td>
<td>1A-CUPP, JEAN</td>
<td>CUPP, JEAN</td>
</tr>
<tr>
<td>267</td>
<td>22617000015599</td>
<td>WCHRI, CASEY</td>
<td>STUDENT1</td>
<td>1A-CUPP, JEAN</td>
<td>CUPP, JEAN</td>
</tr>
<tr>
<td>268</td>
<td>22617000015649</td>
<td>KIMMEL, ANGELEA</td>
<td>STUDENT1</td>
<td>1A-CUPP, JEAN</td>
<td>CUPP, JEAN</td>
</tr>
<tr>
<td>269</td>
<td>22617000015722</td>
<td>SCHWARTZ, EMILY</td>
<td>STUDENT1</td>
<td>1A-CUPP, JEAN</td>
<td>CUPP, JEAN</td>
</tr>
<tr>
<td>270</td>
<td>22617000015755</td>
<td>DUNBAR, JEREMY</td>
<td>STUDENT1</td>
<td>1A-CUPP, JEAN</td>
<td>CUPP, JEAN</td>
</tr>
<tr>
<td>271</td>
<td>22617000015756</td>
<td>GAY, TYLER</td>
<td>STUDENT2</td>
<td>1B-KOCH, CHERY</td>
<td>KOCH, CHER</td>
</tr>
<tr>
<td>272</td>
<td>22617000015762</td>
<td>BRINKMAN, REBECCA</td>
<td>STUDENT1</td>
<td>1B-KOCH, CHERY</td>
<td>KOCH, CHER</td>
</tr>
<tr>
<td>273</td>
<td>22617000015766</td>
<td>BUSS, COURTNEY</td>
<td>STUDENT1</td>
<td>1B-KOCH, CHERY</td>
<td>KOCH, CHER</td>
</tr>
<tr>
<td>274</td>
<td>22617000015704</td>
<td>BUSS, KATHRYN (KATEY)</td>
<td>STUDENT1</td>
<td>1B-KOCH, CHERY</td>
<td>KOCH, CHER</td>
</tr>
<tr>
<td>275</td>
<td>22617000015709</td>
<td>DUNN, JACOB</td>
<td>STUDENT1</td>
<td>1B-KOCH, CHERY</td>
<td>KOCH, CHER</td>
</tr>
<tr>
<td>276</td>
<td>22617000015711</td>
<td>GERDING, VICTORIA (TOP)</td>
<td>STUDENT1</td>
<td>1B-KOCH, CHERY</td>
<td>KOCH, CHER</td>
</tr>
</tbody>
</table>

Running and saving the report

**Brief or Long format**

Save as a Template (optional, but helpful if you want to tweak results).

1. **Run** the report.
2. **Click** Finished Reports wizard.
3. **Select** report name and **click** View.
4. **Uncheck** ‘View log’.
5. **Uncheck** “Format report”.
6. **Click** OK.
7. Your report will open in your pre-selected word processing program.
8. **Customize** the report and/or **save** it if you wish.
Spreadsheet format

1. **Run** the report.

2. Under the Reports Wizard, **click** on Report Session.
3. **Use** the gadget to set the application to view reports in Excel.

4. **Click** Finished Reports wizard.
5. **Select** report name and **click** View.
6. **Uncheck** ‘View log’ and ‘Format report’ and **click** OK.

7. When you view the report, it will be in Excel and can be manipulated easily. **Customize** the spreadsheet and/or save it if you wish.

8. Remember to **change** report session back to your preferred word processing program (Winword, Appleworks, Text edit, etc…) when you’re done!

**HINT:** If your barcode column looks like this: 3.0499+13 you’ll need to format the cells.

- **Highlight** the barcode column.
- **Click** Format > Cells.
- On the Number Tab, **select** Number
- **Set** the decimal places to 0.
Dumb Barcode Labels

Setting up the report

1. Click Schedule New Reports wizard.
2. Select the INFOhio tab.
4. Click Setup & Schedule.

Basic Information Tab

5. Change the Report name and/or Title if you wish.

Library Selection / Selection Criteria Tab

6. Select the library for which you wish to create dumb labels

Output Options Tab

a. Choose your computer platform
b. Barcode type: Item or User
c. Check box to display the school and district names.
d. Enter a line of text you would like to have included on every label.
e. If you want to begin printing on at a different label number on the 1st page (other than the 1st label), enter the label number here.
f. Number of labels you want to create.
g. Enter the email address(es) of those to whom you wish to email copies of these labels.

NOTE: You do not need to enter a starting number. Once your ITC enters it in your file, the software tracks it for you. If your file has not yet been prepared by the ITC staff, you will see this message in the report log:

File does not exist. This file must exist to produce valid dumb barcodes. Contact your tech. coordinator or Tech Services.
Running, Viewing and Printing the Report

1. **Click** Run Now.
2. **Click** Finished Reports Tab.
3. **Select** report name and **Click** view.
4. **Uncheck** ‘View Log’ and **Uncheck** ‘Format Report’ and **Click** OK.

The labels will appear in Word, Open Office or other RTF-Capable software you're using to view your reports. At this point, you can print the labels as you would any other document.

**NOTE:** When printing, you will see a pop-up message saying: “The margins of section 1 are set outside the printable area of the page. Do you want to continue?”

**Click** “YES”

Troubleshooting Label Problems

There are a few common problems that can be experienced when producing labels. These problems are very easy to correct.

1. **Labels do not line up properly on the label paper.**
   a. Make sure you **UNCHECK** the ‘Format Report’ option when you view the report.
   b. Make sure you are using Word, Open Office or a 100% RTF Compliant software package to view the reports. Microsoft’s WordPad is an example of an application that displays the labels fine but will not print them properly as it does not meet the RTF specification 100%.

2. **Labels are unreadable or filled with strange characters.**

   Make sure you **UNCHECK** the ‘View Log’ option when you view the report.

3. **Barcodes appear as numbers instead of actual barcodes.**
   a. Make sure you have the right font installed on your computer. For PCs, you must have the Free 3 of 9 font, for MACs, you must have the 39251 Regular font. Fonts can be downloaded from [http://www.infohio.org/downloads/Fonts/Default.html](http://www.infohio.org/downloads/Fonts/Default.html).
   b. Make sure you selected the appropriate ‘Platform’ option on the Output options screen. You must select ‘PC’ or ‘MAC’ accordingly.

4. **Optional line of text is cut off or does not display at all.**

   Shorten the line of optional text and ensure no special characters (CTRL Characters) are entered.

5. **The barcode values to not appear to be correct.**

   There is a file that must be updated on the system in order for the dumb barcode report to produce valid barcodes. This must be corrected by Tech Services.

**Software packages that view/print RTF label documents properly.**

<table>
<thead>
<tr>
<th>Software</th>
<th>PC</th>
<th>MAC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Office (Word)</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Open Office (Word Processor)</td>
<td>Y</td>
<td>Y</td>
</tr>
</tbody>
</table>
Item Barcode and Spine Labels

Setting up the report

1. **Click** Schedule New Reports wizard.
2. **Select** the INFOhio tab.
3. **Select** LBL : Item Labels.
4. **Click** Setup & Schedule.

Basic Information Tab

5. **Change** the Report name and/or Title if you wish.

Selection Criteria Tabs

6. **Select** options as needed – the fewer the better.
7. **Leave** the default *Number of copies: >0* in place on the Call Number Selection tab.
8. **Use** gadgets 🖐️ to ensure correct formatting of data entry.

**NOTE:** In the following example, the librarian wants to create labels for items for SPECIFIC LIBRARY (XXXX), added over the summer (after June 1st) (*ITEM selection tab*) by a specific librarian (LIB1XXXX profile) (*TITLE selection tab*)
Sorting Tab

9. Sort as desired.

<table>
<thead>
<tr>
<th>Search String</th>
<th>Item IDs</th>
<th>Title Selection</th>
<th>Call Number Selection</th>
<th>Item Selection</th>
<th>Sorting</th>
</tr>
</thead>
<tbody>
<tr>
<td>call number/author/title</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>author/title</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>9</td>
</tr>
<tr>
<td>call number/author/title</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>item id</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>pub year/author/title</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>pub year/title/author</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>title/author</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Output Options Tab – Select the Platform you’re using and the type of label you want.

10. Select PC or MAC
11. Select Barcode Labels or Spine Labels
12. Set the appropriate output options

Barcode Labels Options

a. Include the School District Name on the Label (check for yes).

b. Include the Library Name on the Label (check for yes).

c. Insert page breaks based on your sorting selection.

d. If you want to begin printing on at a different label on the 1st page (other than the 1st label), enter the label number here.

e. Enter a line of text you would like to have included on every label.

f. Enter the email address(es) of those to whom you wish to email copies of these labels, separated by commas.

g. Print a full page of labels or have the report skip every other row or the middle column.
Spine Label Options

a. If you want to begin printing at a different label on the 1st page (other than the 1st label), enter the label number here.

b. Enter the size of the font you want to use for the spine labels.

c. If you want to email copies of these labels to one or more people, enter their address(es), separated by commas, into this blank.

Running, Viewing and Printing the Report

1. Click Run Now.
2. Click Finished Reports Tab.
3. Select report name and Click view.
4. Uncheck ‘View Log’ and Uncheck ‘Format Report’ and Click OK.

The labels will appear in Word, Open Office or other RTF-Capable software you’re using to view your reports. At this point, you can print the labels as you would any other document.

NOTE: When printing, you will see a pop-up message saying: “The margins of section 1 are set outside the printable area of the page. Do you want to continue?” Click “YES”

Suggested report selections for specific labels:

Item labels for SPECIFIC LIBRARY - new items added on specific date by specific profile
Title tab: Date modified / Modified by  Item tab: Library / Date created

Item labels for ALL LIBRARIES IN DISTRICT - new items added on specific date by specific profile
Title tab: Date modified / Modified by  Item tab: Date created

Item labels for SPECIFIC LIBRARY - new items added after a specific date by specific profile
Title tab: Date modified / Modified by  Item tab: Library / Date created (range)

Spine labels for SPECIFIC LIBRARY - new items added after a specific date by specific profile
Title tab: Date modified / Modified by  Item tab: Library / Date created (range)  Output tab: spine labels
Troubleshooting Label Problems

There are a few common problems that can be experienced when producing labels. These problems are very easy to correct.

1. Labels do not line up properly on the label paper.
   a. Make sure you UNCHECK the ‘Format Report’ option when you view the report.
   b. Make sure you are using Word, Open Office or a 100% RTF Compliant software package to view the reports. Microsoft’s WordPad is an example of an application that displays the labels fine but will not print them properly as it does not meet the RTF specification 100%.

2. Labels are unreadable or filled with strange characters.
   Make sure you UNCHECK the ‘View Log’ option when you view the report.

3. Barcodes appears as numbers instead of actual barcodes.
   a. Make sure you have the right font installed on your computer. For PCs, you must have the Free 3 of 9 font, for MACs, you must have the 39251 Regular font. Fonts can be downloaded from [http://www.infohio.org/downloads/Fonts/Default.html](http://www.infohio.org/downloads/Fonts/Default.html).
   b. Make sure you selected the appropriate ‘Platform’ option on the Output options screen. You must select ‘PC’ or ‘MAC’ accordingly.

4. Optional line of text is cut off or does not display at all.
   Shorten the line of optional text and ensure no special characters (CTRL Characters) are entered.

5. The font on the spine labels is too small or too large
   Change the font size value on the Output Options screen

6. For Spine labels printed horizontally on label:
   When viewing in WORD, select text to be changed, go to Format > “Text Direction...” and pick one of the sideways orientations.

Label stock:
Barcode labels: 1” x 2 5/8” (30 to a page) Avery 5160
Spine labels: 1 1/2” x 1”; 8 across, 7 down (56 to a page)
Setting up the report

1. **Click** Schedule New Reports wizard.
2. **Select** the INFOhio tab.
3. **Select** LBL : User Labels.
4. **Click** Setup & Schedule.

Basic Information Tab

5. **Change** the Report name and/or Title if you wish.

Selection Criteria Tabs

6. **Select** options as needed – the fewer the better.
7. **Use** gadgets to ensure correct formatting of data entry.

**NOTE:** In this example, the librarian wants to create labels for 5th grade students.

Sorting Criteria Tab

8. **Sort** as desired.

Library/Room/Name – will list alphabetical by homeroom.
Output Options Tab – Select the Platform you’re using and the type of label you want.

9. Label Options output tab

**Label Type**

a. **Select** barcode labels or address labels

b. **Select** either MAC or PC. This option must be selected correctly in order for the actual barcodes to display properly.

**Label Options**

c. **Check or uncheck** to Print the School District and/or the School Library on each Label (check for yes).

d. **Check** Insert page breaks based on the selected sort option if desired. For example, if you sorted by Teacher, a page break will be inserted before each teacher’s class. The first label displays the teacher (selected sort option) for that page.

e. **Check** the information to be displayed on your label (by DEFAULT, the User ID barcode and value is selected). You can choose to create the barcode from the Alt-ID number. Or, if desired, you can select BOTH.

f. **Select** the label (on the label paper/sheet) on which you want the labels to begin printing.

g. You may **Type** an optional line of text that will appear on each label.

h. You may email copies of the labels to the email addresses **typed** in this blank. Must be separated by commas.

i. **Select** the format for which you want the labels printed. You can choose to have the labels print on all labels, skip the middle column or skip every other row.
Running, Viewing and Printing the Report

1. **Click** Run Now.
2. **Click** Finished Reports Tab
3. **Select** report name and **Click** view.
4. **Uncheck** ‘View Log’ and **Uncheck** ‘Format Report’ and **Click** OK.

The labels will appear in Word, Open Office or other RTF-Capable software you’re using to view your reports. At this point, you can print the labels as you would any other document.

**NOTE:** When printing, you will see a pop-up message saying: “The margins of section 1 are set outside the printable area of the page. Do you want to continue?” **Click** “YES”

Sample Patron Address labels output:

| Ashbaugh, ELIJAH (JAMES) (ELI)   | Ashbaugh, ETHAN | Aultman, JORDAN (ANDRE) |
| 123 Any Street                  | 123 Any Street  | 123 Any Street          |
| Anytown, OH 40000               | Anytown, OH 40000| Anytown, OH 40000       |

| Bard, TAYLOR (MARIE)            | Beal, BRYANT    | Bishop, ANASTASIA (LO)  |
| 123 Any Street                  | 123 Any Street  | 123 Any Street          |
| Anytown, OH 40000               | Anytown, OH 40000| Anytown, OH 40000       |

| Blyant, BRANDY                  | Boyer, ELIJAH (JACOB) | Briggs, ZACHARY (JORD) |
| 123 Any Street                  | 123 Any Street       | 123 Any Street         |
| Anytown, OH 40000               | Anytown, OH 40000    | Anytown, OH 40000      |

| Burns, T ORI (RAE)              | Busk, MICHAEL (JOSE) | Buzzard, JOSEPH (ARTHU) |
| 123 Any Street                  | 123 Any Street       | 123 Any Street         |
| Anytown, OH 40000               | Anytown, OH 40000    | Anytown, OH 40000      |

| Caldwell, HALEE (MARIE)         | Cass, PAIGE (ELIZAB) | Churchill, CHRISTOPHER CA |
| 123 Any Street                  | 123 Any Street       | 123 Any Street          |
| Anytown, OH 40000               | Anytown, OH 40000    | Anytown, OH 40000       |
Sample Patron User ID barcode output:

<table>
<thead>
<tr>
<th>TEST City School District</th>
<th>TEST City School District</th>
<th>TEST City School District</th>
</tr>
</thead>
<tbody>
<tr>
<td>TEST DLFN Elementary School Ashbaugh, ELIJAH (JAMES) (ELI)</td>
<td>TEST DLFN Elementary School Ashbaugh, ETHAN</td>
<td>TEST DLFN Elementary School Aultman, JORDAN (ANDRE)</td>
</tr>
<tr>
<td>TEST City School District</td>
<td>TEST City School District</td>
<td>TEST City School District</td>
</tr>
<tr>
<td>TEST DLFN Elementary School Bard, TAYLOR (MARIE)</td>
<td>TEST DLFN Elementary School Ball, BRYANT</td>
<td>TEST DLFN Elementary School Bishop, ANASTASIA (LO)</td>
</tr>
<tr>
<td>TEST City School District</td>
<td>TEST City School District</td>
<td>TEST City School District</td>
</tr>
<tr>
<td>TEST DLFN Elementary School Burrell, TOM (RAE)</td>
<td>TEST DLFN Elementary School Bush, MICHAEL (JOSE)</td>
<td>TEST DLFN Elementary School Buzzard, JOSEPH (ARTHUR)</td>
</tr>
<tr>
<td>TEST City School District</td>
<td>TEST City School District</td>
<td>TEST City School District</td>
</tr>
<tr>
<td>TEST DLFN Elementary School Caldwell, HALEE (MARIE)</td>
<td>TEST DLFN Elementary School Cass, PAIGE (ELIZAB)</td>
<td>TEST DLFN Elementary School Churchill, CHRISTOPHER CA</td>
</tr>
</tbody>
</table>

Sample Patron Alt-ID barcode output:

<table>
<thead>
<tr>
<th>TEST City School District</th>
<th>TEST City School District</th>
<th>TEST City School District</th>
</tr>
</thead>
<tbody>
<tr>
<td>TEST DLFN Elementary School Ashbaugh, ELIJAH (JAMES)</td>
<td>TEST DLFN Elementary School Ashbaugh, ETHAN</td>
<td>TEST DLFN Elementary School Aultman, JORDAN (ANDRE)</td>
</tr>
<tr>
<td>TEST City School District</td>
<td>TEST City School District</td>
<td>TEST City School District</td>
</tr>
<tr>
<td>TEST DLFN Elementary School Bard, TAYLOR (MARIE)</td>
<td>TEST DLFN Elementary School Ball, BRYANT</td>
<td>TEST DLFN Elementary School Bishop, ANASTASIA (LO)</td>
</tr>
<tr>
<td>TEST City School District</td>
<td>TEST City School District</td>
<td>TEST City School District</td>
</tr>
<tr>
<td>TEST DLFN Elementary School Burrell, TOM (RAE)</td>
<td>TEST DLFN Elementary School Bush, MICHAEL (JOSE)</td>
<td>TEST DLFN Elementary School Buzzard, JOSEPH (ARTHUR)</td>
</tr>
<tr>
<td>TEST City School District</td>
<td>TEST City School District</td>
<td>TEST City School District</td>
</tr>
<tr>
<td>TEST DLFN Elementary School Caldwell, HALEE (MARIE)</td>
<td>TEST DLFN Elementary School Cass, PAIGE (ELIZAB)</td>
<td>TEST DLFN Elementary School Churchill, CHRISTOPHER CA</td>
</tr>
</tbody>
</table>

Last Updated Jul 2009
Sample Patron User ID barcode output, start with label # 6:

<table>
<thead>
<tr>
<th>Label # 6</th>
<th>Label # 6</th>
<th>Label # 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>TEST City School District</td>
<td>TEST City School District</td>
<td>TEST City School District</td>
</tr>
<tr>
<td>TEST DLFN Elementary School</td>
<td>TEST DLFN Elementary School</td>
<td>TEST DLFN Elementary School</td>
</tr>
<tr>
<td>Ashbaugh, ETHAN</td>
<td>Aultman, JORDAN (ANDRE)</td>
<td>Bard, TAYLOR (MARIE)</td>
</tr>
<tr>
<td>2261200200102</td>
<td>22612001602107</td>
<td>22612001609406</td>
</tr>
<tr>
<td>TEST City School District</td>
<td>TEST City School District</td>
<td>TEST City School District</td>
</tr>
<tr>
<td>TEST DLFN Elementary School</td>
<td>TEST DLFN Elementary School</td>
<td>TEST DLFN Elementary School</td>
</tr>
<tr>
<td>Buell, BRYANT</td>
<td>Bishop, ANASTASIA (LO)</td>
<td>Bryant, BRANDY</td>
</tr>
<tr>
<td>22612001609503</td>
<td>22612001602030</td>
<td>22612001505000</td>
</tr>
<tr>
<td>TEST City School District</td>
<td>TEST City School District</td>
<td>TEST City School District</td>
</tr>
<tr>
<td>TEST DLFN Elementary School</td>
<td>TEST DLFN Elementary School</td>
<td>TEST DLFN Elementary School</td>
</tr>
<tr>
<td>Busk, MICHAEL (JOSE)</td>
<td>Buzzard, JOSEPH (ARTHUR)</td>
<td>Caldwell, HALIE (MARIE)</td>
</tr>
<tr>
<td>22612001601208</td>
<td>22612001601807</td>
<td>22612001604063</td>
</tr>
</tbody>
</table>

Sample Patron User ID barcode output, Page format “skip column” selected:

<table>
<thead>
<tr>
<th>Label # 6</th>
<th>Label # 6</th>
<th>Label # 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>TEST City School District</td>
<td>TEST City School District</td>
<td>TEST City School District</td>
</tr>
<tr>
<td>TEST DLFN Elementary School</td>
<td>TEST DLFN Elementary School</td>
<td>TEST DLFN Elementary School</td>
</tr>
<tr>
<td>Ashbaugh, ELIJAH (JAMES) (EL)</td>
<td>Aultman, JORDAN (ANDRE)</td>
<td>Bard, TAYLOR (MARIE)</td>
</tr>
<tr>
<td>2261200200182</td>
<td>22612001602107</td>
<td>22612001609406</td>
</tr>
<tr>
<td>TEST City School District</td>
<td>TEST City School District</td>
<td>TEST City School District</td>
</tr>
<tr>
<td>TEST DLFN Elementary School</td>
<td>TEST DLFN Elementary School</td>
<td>TEST DLFN Elementary School</td>
</tr>
<tr>
<td>Buell, BRYANT</td>
<td>Bishop, ANASTASIA (LO)</td>
<td>Bryant, BRANDY</td>
</tr>
<tr>
<td>22612001609503</td>
<td>22612001602030</td>
<td>22612001505000</td>
</tr>
<tr>
<td>TEST City School District</td>
<td>TEST City School District</td>
<td>TEST City School District</td>
</tr>
<tr>
<td>TEST DLFN Elementary School</td>
<td>TEST DLFN Elementary School</td>
<td>TEST DLFN Elementary School</td>
</tr>
<tr>
<td>Busk, MICHAEL (JOSE)</td>
<td>Buzzard, JOSEPH (ARTHUR)</td>
<td>Caldwell, HALIE (MARIE)</td>
</tr>
<tr>
<td>22612001601208</td>
<td>22612001601807</td>
<td>22612001604063</td>
</tr>
</tbody>
</table>

Last Updated Jul 2009
Troubleshooting Label Problems

There are a few common problems that can be experienced when producing labels. These problems are very easy to correct.

1. Labels do not line up properly on the label paper.
   a. Make sure you UNCHECK the ‘Format Report’ option when you view the report.
   b. Make sure you are using Word, Open Office or a 100% RTF Compliant software package to view the reports. Microsoft’s WordPad is an example of an application that displays the labels fine but will not print them properly as it does not meet the RTF specification 100%.

2. Labels are unreadable or filled with strange characters.
   Make sure you UNCHECK the ‘View Log’ option when you view the report.

3. Barcodes appears as numbers instead of actual barcodes.
   a. Make sure you have the right font installed on your computer. For PCs, you must have the Free 3 of 9 font, for MACs, you must have the 39251 Regular font. Fonts can be downloaded from http://www.infohio.org/downloads/Fonts/Default.html.
   b. Make sure you selected the appropriate ‘Platform’ option on the Output options screen. You must select ‘PC’ or ‘MAC’ accordingly.

4. Optional line of text is cut off or does not display at all.
   Shorten the line of optional text and ensure no special characters (CTRL Characters) are entered.

5. The font on the spine labels is too small or too large.
   Change the font size value on the Output Options screen.

Software packages that view/print RTF label documents properly.

<table>
<thead>
<tr>
<th>Software</th>
<th>PC</th>
<th>MAC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Office (Word)</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Open Office (Word Processor)</td>
<td>Y</td>
<td>Y</td>
</tr>
</tbody>
</table>
Incremental Overdue Notice

- This report will give you a basic report for overdues and the accrued fine for the overdue item (to date), sorted by Homeroom.
- This report is designed to be run daily, similar to the old batch overdues. The student will get a notice once a week (if appropriate). Notices will be counted and the appropriate notice message printed (1st notice, 2nd notice, etc.)
- **Do not** use this report if you want notices for all students at the same time. Use the CIR: Overdues and Notices.
- Notice texts can be customized (by your ITC) to district-wide messages.
- This needs to be set as a scheduled report.

Setting up the report

1. **Click** Schedule New Reports wizard.
2. **Select** the Custom tab.
3. **Select** OH Incremental Ovrdue Notices.
4. **Click** Setup & Schedule.

<table>
<thead>
<tr>
<th>User Selection</th>
<th>User Status Selection</th>
<th>Sorting</th>
<th>Checkout Notice</th>
<th>Produce Mailing Labels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Basic Information Tab**

- **Change** the Report name and/or Title if you wish.

**Selection (Checkout Selection, Copy Selection, User Selection, User Status Selection) Tabs:**

- **Checkout Selection** - Select your building from the dropdown menu, remove ChangeThis. No other selections needed here unless you want to limit results.  
  **NOTE:** If Library is left blank, all buildings are reported.
- **Item Selection** – Select your library or leave blank for all buildings. No other selections needed here unless you want to limit results.
- **User Selection** – Select library, profile, grade or other fields only if you want to limit results. Leave the check in “blank field matches with Not Equal Qualifier” box.

**Sorting Tab:**

- Select Sort option – Homeroom (group ID), Teacher, User ID, User name.

**Checkout Notice Tab:**

- The defaults should suffice, but can be modified if desired.
- Your ITC staff can assist with selecting notice text if you want something customized.

**Produce Mailing Labels**

- Currently not working.
Schedule the report.

- **Click** Schedule at the bottom of the screen.
- To schedule the report to run on a daily basis, Mon. – Fri., before school begins:
  - **Select** WEEKLY
  - Start running on: **Select** TOMORROW's date, time of 7:15 or later.
  - Days of week: **Select** MON, T, W, TH, FR

Examples of notice text:

**OVERDUE NOTICE**

According to our records, the following are checked out in your name and are now overdue. Please return the items as soon as possible because an overdue fine of $.05 per day is being charged to you. See the library if you have any questions.

**SECOND OVERDUE NOTICE**

The following Library materials are still overdue, even though a notice was sent to bring this to your attention. Overdue charges are continuing to accrue. Please return these materials and pay the fines associated with these items.

Thank you.

**Incremental Overdue Notice – Example**

**Friday, January 14, 2005**

Delphos Jefferson High School
926 N. State St.
Delphos
OH
45833

- BRADLEY JOSEPH RODE
- GARY/ELAINE RODE
- XXXX BLOOMFIELD RD
- SPENCERVILLE
- OHIO
- 45867

**Home Room:** ALL7-AYDER, RS

**Dear BRADLEY JOSEPH RODE,**

**SECOND OVERDUE NOTICE**

The following Library materials are still overdue, even though a notice was sent to bring this to your attention. Overdue charges are continuing to accrue. Please return these materials and pay the fines associated with these items.

Thank you.

1. **Due:** 12/20/2004 23:59  **Call Number:** FSC WIN  **ID:** 32612100095805  **Price:** $3.25  **Accrued fine to date:** $4.45
   - **No promises in the wind** / Irene Hunt.  **Hunt, Irene.**

2. **Due:** 12/20/2004 23:59  **Call Number:** FSC WIN  **ID:** 32612100023551  **Price:** $2.25  **Accrued fine to date:** $4.45
   - **Walking** / Irene Hunt.  **Hunt, Irene.**
Item Count (LIBRARY)

This report will give you a count of the items, per Item Group, per Library (or output for selection made).

Setting up the report
1. **Click** Schedule New Reports wizard.
2. **Select** Custom tab.
3. **Select** OH Item Count (LIBRARY)
4. **Click** Setup & Schedule.

Basic Information Tab
5. **Change** the Report name and/or Title if you wish. It should reflect the content of the report.
6. **Description** is a good place to note any special print setup. If you save the report as a template, you will see this screen each time you run it.
7. **Title** appears on each page.
8. **Footer** appears at the bottom of each page (optional)

Title Selection Tab
- **Make** selections as appropriate.
- Use gadgets to ensure correct formatting of data entry.

Call Number Selection Tab
- **Make** selections as appropriate.
- Use gadgets to ensure correct formatting of data entry.

**NOTE:** If Library is left blank, all buildings are reported.

Item Selection Tab
- **Make** selections as appropriate
- Use gadgets to ensure correct formatting of data entry.

Transaction Statistics Tab
- Select output from drop-down menus for Column and Row
- Default settings are Item Library (column) and Item group (row)

Running and saving the report
1. **Click** Run Now.
2. **Click** Finished Reports wizard.
3. **Select** report name and click View.
4. **Select** report view options: uncheck ‘View log’.
5. **Customize** the report and/or save it if you wish.
Example of report output:

<table>
<thead>
<tr>
<th>Item group</th>
<th>Item library</th>
<th>LKHS</th>
<th>LKIN</th>
<th>LKLB</th>
<th>LKNO</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUDIOBOOK</td>
<td>74</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>74</td>
</tr>
<tr>
<td>AUDIOVITAL</td>
<td>254</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>254</td>
</tr>
<tr>
<td>BOOK</td>
<td>8</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>8</td>
</tr>
<tr>
<td>CARTOGRAPHER</td>
<td>98</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>98</td>
</tr>
<tr>
<td>CD</td>
<td>28</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>28</td>
</tr>
<tr>
<td>EASY</td>
<td>124</td>
<td>5382</td>
<td>6653</td>
<td>3190</td>
<td>12374</td>
<td></td>
</tr>
<tr>
<td>EBOOK</td>
<td>39</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>39</td>
</tr>
<tr>
<td>FICTION</td>
<td>4617</td>
<td>4264</td>
<td>4883</td>
<td>1990</td>
<td>16962</td>
<td></td>
</tr>
<tr>
<td>GAME</td>
<td>12</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>12</td>
</tr>
<tr>
<td>KIT</td>
<td>1</td>
<td>20</td>
<td>2</td>
<td>2</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>LASERDISC</td>
<td>59</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>59</td>
</tr>
<tr>
<td>MEMOIR</td>
<td>135</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>135</td>
</tr>
<tr>
<td>NONFICTION</td>
<td>6791</td>
<td>5001</td>
<td>4907</td>
<td>5806</td>
<td>21907</td>
<td></td>
</tr>
</tbody>
</table>
List of Overdues / Fines

This report will give you a list of patrons with overdue items and/or overdue fines, sorted by Homeroom (one Homeroom per page). Output is NOT changeable.

**NOTE**: excess “white space” can be deleted with Word editor, if a continuous list is desired.

Setting up the report

1. **Click** Schedule New Reports wizard.
2. **Select** the Custom tab.
3. **Select** OH List of Overdues/Fines.
4. **Click** Setup & Schedule.

Basic Information Tab

- **Change** the Report name and/or Title if you wish.
- **Delete** the footer or edit Change This.

Selection (Homeroom, Checkout Selection, User Selection, User Status Selection) Tabs:

- **Homeroom** – specific homerooms can be selected. They must be entered exactly as they appear in patron records.
- **Checkout Selection** – limits output to a specific date or date range.
- **User Selection** – indicate your library, patron profile, grades, etc. If Library is left blank, all buildings are reported.
- **User Status Selection** – allows you to limit by user status and/or amount of fines owed.
- Use gadgets 🖥 to ensure correct formatting of data entry.

Sorting Criteria Tab:

- Select to sort by name or ID.
Example of report:

<table>
<thead>
<tr>
<th>Item id</th>
<th>Title</th>
<th>Billed/Reason/Balance/Price</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>32626004016055</td>
<td>Barbie : two princess</td>
<td>$0.05 OVERDUE $0.05</td>
</tr>
<tr>
<td>32626001006885</td>
<td>Sleeping Beauty / ada</td>
<td>$0.15 OVERDUE $0.15</td>
</tr>
<tr>
<td>32626001009285</td>
<td>Lilly's purple plastic</td>
<td>$0.15 OVERDUE $0.15</td>
</tr>
<tr>
<td>32626001006786</td>
<td>Amigo means friend /</td>
<td>12/13/2004 1/3/2005 $5.41</td>
</tr>
<tr>
<td>32626001006794</td>
<td>Bubble gum in the sky</td>
<td>12/13/2004 1/3/2005 $5.41</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item id</th>
<th>Title</th>
<th>Billed/Reason/Balance/Price</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>32626004030320</td>
<td>Crispin : the cross o</td>
<td>$0.25 OVERDUE $.25</td>
</tr>
<tr>
<td>32626004026005</td>
<td>Who was Helen Keller?</td>
<td>$0.55 OVERDUE $.55</td>
</tr>
<tr>
<td>32626004020271</td>
<td>DK big book of cars /</td>
<td>12/2/2004 12/16/2004 $14.95</td>
</tr>
<tr>
<td>32626004013607</td>
<td>World War II / write</td>
<td>$.05 OVERDUE $.05</td>
</tr>
<tr>
<td>32626004017384</td>
<td>Germany.</td>
<td>$.20 OVERDUE $.20</td>
</tr>
<tr>
<td>32626004003145</td>
<td>Ajeemah and his son /</td>
<td>12/16/2004 1/3/2005 $13.00</td>
</tr>
</tbody>
</table>

NOTE: This is a page break. Extra white space has been removed.
Monthly Circ Count

Setting up the report

1. **Click** Schedule New Reports wizard.
2. **Select** the MY STATISTICS tab.
3. **Select** Custom Circ Count by Item Grp.
4. **Click** Setup & Schedule.

**Basic Information Tab**
- **Change** the Report name and/or Title if you wish.
- **Change** or delete Footer.

**Transaction Statistics Selection Tab**
- **Select** the appropriate item group(s).

**NOTE:** If the item group field is left blank, all item groups are reported.

**Transaction Selection Tab**
- **Make** selections as appropriate.
- **Use gadgets** to ensure proper formatting.
- **Clicking on the calendar helper** allows you to choose a transaction date range if desired.

**NOTE:** If Library is left blank, all buildings are reported.

**Transaction Statistics Tab**
- Default setting is for Item group totals
- **Make** other selections as appropriate.
- The drop down menus will allow customization of the report.
Running and saving the report

1. Click Run Now.
2. Click Finished Reports wizard.
3. Select report name and click View.
4. Uncheck ‘View log’.
5. Customize the report and/or save it if you wish.

NOTE: This report can be scheduled to run Monthly on a specified day of the month.

Example of report (individual library):

<table>
<thead>
<tr>
<th>Item group</th>
<th>TOTAL</th>
<th>PIECES</th>
<th>CIRC</th>
</tr>
</thead>
<tbody>
<tr>
<td>BIOGRAPHY</td>
<td>21</td>
<td>21</td>
<td></td>
</tr>
<tr>
<td>EQUIPMENT</td>
<td>1</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>FICTION</td>
<td>75</td>
<td>75</td>
<td></td>
</tr>
<tr>
<td>MISC</td>
<td>2</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>NONFICTION</td>
<td>172</td>
<td>172</td>
<td></td>
</tr>
<tr>
<td>REFERENCE</td>
<td>1</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>STORYCOLL</td>
<td>1</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>VIDEO</td>
<td>20</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td>295</td>
<td>295</td>
<td></td>
</tr>
</tbody>
</table>
Example of report (all):

<table>
<thead>
<tr>
<th>Item group</th>
<th>Item library</th>
<th>CVHS</th>
<th>CVNS</th>
<th>TOTAL PIECES CIRC</th>
</tr>
</thead>
<tbody>
<tr>
<td>BIOGRAPHY</td>
<td>2</td>
<td>23</td>
<td>0</td>
<td>25</td>
</tr>
<tr>
<td>FAST</td>
<td>2</td>
<td>0</td>
<td>9</td>
<td>2</td>
</tr>
<tr>
<td>EQUIPMENT</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>FICTION</td>
<td>0</td>
<td>82</td>
<td>3</td>
<td>85</td>
</tr>
<tr>
<td>MISC</td>
<td>0</td>
<td>4</td>
<td>0</td>
<td>4</td>
</tr>
<tr>
<td>NONFICTION</td>
<td>3</td>
<td>165</td>
<td>23</td>
<td>196</td>
</tr>
<tr>
<td>REFERENCE</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>STORYCOLL</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>VIDEO</td>
<td>1</td>
<td>26</td>
<td>1</td>
<td>22</td>
</tr>
<tr>
<td>TOTAL</td>
<td>8</td>
<td>297</td>
<td>32</td>
<td>337</td>
</tr>
</tbody>
</table>
Overdue Desk List

Setting up the report

1. Click Schedule New Reports wizard.
2. Select the Custom tab name.
3. Select OH Overdue Desk List.
4. Click Setup & Schedule.

The settings for this report will give you a list of patrons with overdue items, sorted by Homeroom (one Homeroom per page). Output is NOT changeable.

Note: excess “white space” can be deleted with Word editor, if a continuous list is desired.

Basic Information Tab

- Change the Report name and/or Title if you wish.

Selection (Homeroom, Checkout Selection, User Selection, User Status Selection) Tabs:

- Make selections as appropriate.
- Use gadgets to ensure correct formatting of data entry.

NOTE: If Library is left blank, all buildings are reported.

- Homeroom selection – specific homeroom information can be selected, string must be entered exactly as data appears in records.
- User Selection
  Select your building from the dropdown menu, remove ChangeThis.
  Select your Student profile(s) from the dropdown menu, remove ChangeThis.

Sorting Criteria Tab:

- Sort is by username (within the Homeroom sort as noted above)
Example of report (NOTE: page breaks between homerooms):

<table>
<thead>
<tr>
<th>Item id</th>
<th>Title</th>
<th>Checked out</th>
<th>Due Date</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>32611000207312</td>
<td>Rifles for Watie / by</td>
<td>12/15/2004</td>
<td>1/3/2005</td>
<td>$10.10</td>
</tr>
<tr>
<td>32611001143730</td>
<td>The austere academy /</td>
<td>12/8/2004</td>
<td>1/3/2005</td>
<td>$6.95</td>
</tr>
<tr>
<td>32611001142302</td>
<td>The wide window / by</td>
<td>12/15/2004</td>
<td>1/3/2005</td>
<td>$6.95</td>
</tr>
<tr>
<td>32611001139019</td>
<td>Peter Pan / by J.M. B</td>
<td>12/1/2004</td>
<td>1/3/2005</td>
<td>$10.95</td>
</tr>
<tr>
<td>32611001101563</td>
<td>Wolves and coyotes.</td>
<td>12/15/2004</td>
<td>1/3/2005</td>
<td>$10.95</td>
</tr>
<tr>
<td>32611000201836</td>
<td>By the shores of Silv</td>
<td>12/1/2004</td>
<td>1/3/2005</td>
<td>$10.10</td>
</tr>
<tr>
<td>32611001132147</td>
<td>In the spotlight / by</td>
<td>12/15/2004</td>
<td>1/3/2005</td>
<td>$16.95</td>
</tr>
<tr>
<td>32611001143888</td>
<td>The reptile room / by</td>
<td>12/15/2004</td>
<td>1/3/2005</td>
<td>$6.95</td>
</tr>
<tr>
<td>32611001144985</td>
<td>The austere academy /</td>
<td>12/15/2004</td>
<td>1/3/2005</td>
<td>$.00</td>
</tr>
</tbody>
</table>
Table of Contents
INFOhio Reports
Section 15.8

15.8.2 Statistics Reports
   a. CAS: Age of Collection
   b. CAS: Value of Collection

15.8.3 Cataloging Reports
   a. CAT: Shelflist

15.8.4 Circulation Reports
   a. CIR: Active Loans
   b. CIR: Circulation Statistics
   c. CIR: Overdues and Notices
   d. CIR: Receipts

15.8.5 Patron Reports
   a. PAT: List Users

15.8.6 Label Reports
   a. LBL: Dumb Labels
   b. LBL: Item Labels
   c. LBL: User Labels

15.8.7 Custom Reports
   (Includes Local ICT created reports)
   a. OH Incremental Overdue Notices
   b. OH Item Count (LIBRARY)
   c. OH List of Overdues / Fines
   d. OH Monthly Circ Count
   e. OH Overdue Desk List

Helper Buttons which display on report windows.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Filter and Sort Reports" /></td>
<td>Filter and Sort Reports</td>
</tr>
<tr>
<td><img src="image" alt="Refresh Report" /></td>
<td>Refresh Report</td>
</tr>
<tr>
<td><img src="image" alt="Display Report Scheduler Status" /></td>
<td>Display Report Scheduler Status</td>
</tr>
</tbody>
</table>
## Table of Contents

### Offline (Standalone) Workflows

Section 16

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>16.0</td>
<td>Offline Workflows Contents</td>
</tr>
<tr>
<td>16.01</td>
<td>Offline Workflows Overview</td>
</tr>
<tr>
<td>16.1</td>
<td>Offline Workflows Getting Started</td>
</tr>
<tr>
<td>16.2</td>
<td>Offline Session Settings</td>
</tr>
<tr>
<td>16.3</td>
<td>Offline Register New User</td>
</tr>
<tr>
<td>16.4</td>
<td>Offline Check Out</td>
</tr>
<tr>
<td>16.5</td>
<td>Offline Check In</td>
</tr>
<tr>
<td>16.6</td>
<td>Offline Renew Item</td>
</tr>
<tr>
<td>16.7</td>
<td>Offline Complete Transactions</td>
</tr>
</tbody>
</table>
Offline Circulation
Getting Started

When the Unicorn server is unavailable, do the following to use Offline Workflows to continue circulating items and registering users.

1. **Start** the Unicorn Workflows client. In the Configuration window, **select** the Operate in Offline Mode check box, and **click** OK.

2. **Select** the Offline toolbar.

3. **Click** the Offline Session Settings wizard, confirm or change the settings, and **click** OK to close the wizard.

**NOTE:** Use the Offline wizards for as long as the Unicorn server is unavailable. As you work, transactions are written to a log file named for the library selected in the Library field is created in the `login\Sirsi\Workflows\LOG` directory in the home directory of your login, which is typically `Documents and Settings` for Windows workstations. For example, if you logged into the workstation at the Washington Library as CIRCMAIN, the log file is in `Documents and Settings\CIRCMAIN\Sirsi\Workflows\LOG\WASHINGTON`.

Each time you start Offline Workflows to record offline transactions, the transactions will be appended to the log file. The log file will continue to record transactions until the workstation can connect to the server again.
4. When able to reconnect to the server, **de-select** the Operate in Offline Mode checkbox, **login** as usual.

![Configuration Window](image)

**Note:** For more detailed information or specific questions, use HELP wizard.

5. See Section J16.7 Offline Complete Transactions for instructions to download these transactions to database.
Offline (Standalone) Workflows Overview

The Offline Workflows wizard is used to check out material to registered users and to check in returned materials in an offline mode, when unable to connect to the Unicorn server.

The following conditions apply to Offline Workflows:

- Offline Workflows can only **check out**, **check in**, or **renew** items. Other circulation functions must be done when the server is connected.

- Offline Workflows must have either an **item ID** and/or a **user ID**.

- Offline Workflows **cannot** search or display information from the Unicorn database about items or users, since the workstation is temporarily disconnected from the server where all information is stored.

- The data used by Offline Workflows is **automatically** uploaded and downloaded when the Unicorn WorkFlows client next connects to the server.

- When the data is loaded into Unicorn, each recorded **transaction is performed** as if library staff were at a regular workstation. Errors (display in report) result when an activity recorded at an offline workstation **would have been** blocked or would otherwise fail when done in a real Unicorn database.

**Preparations (completed by ITC staff)** needed to keep the Unicorn WorkFlows workstation up to date so it can use Offline WorkFlows at a moment's notice:

1. On the Unicorn server, run the **Prepare GUI Offline Data** (Prepstand) report to make sure that you have the most current policies and configuration information for your library system. The report generates the files **verifylist** and **config**. This report has been scheduled to run weekly.

2. On the Unicorn server, run the **Update User Delinquency Status** (Setdelinq) report, selecting to generate a list of delinquent users, to make sure that you have current user data for Offline WorkFlows. The report generates the **delinq** file (user status file) and the **dumpdate** file (date and time information). This report has been scheduled to run daily.

3. When the Unicorn WorkFlows client is started, and connected to the Unicorn server, The **verifylist**, **config**, **dumpdate**, and **delinq** files are automatically sent to the **Sirsi\Jwf\Configure** directory on the workstation.
Offline Session Settings

Offline WorkFlows Session Settings are used for the standalone transactions you are creating with Offline WorkFlows while the Unicorn server cannot be accessed using standard WorkFlows.

1. **Select** Offline toolbar

2. **Select** Offline Session wizard

3. **Review** Settings for each session – do **NOT** remove check:

   - User access:
   - Library:
   - Current date: 06/24/2008
   - Current time: 11:25
   - Default due date:
   - Log directory: C:\Documents and Settings\INFOhio,SIRSI Auto-Gen Item,SIRSI Auto-Gen User

4. **Select** appropriate staff User access (to be identified with final transaction) from drop-down menu. To change the user access while in Offline Checkout, you must log out and log back in with the new user access. *This field is required.*

   - User status generated on: Tue Jun 24 00:30:25 2008
   - **Use user delinquent list file**
5. **Select** the Library Field, which is the library associated with the transactions that are ultimately loaded. *This field is required.*

![Library Selection](image)

6. **Enter** the date to be stamped on the transactions (when data is loaded into Workflows), or **select** the default date listed. *ALWAYS use* the date gadget.

![Current Date](image)

**NOTE:** Transactions are appended in each library's file, so you could use Offline Checkout for several days and maintain an accurate date for each transaction.

7. **Enter** the time to be stamped on the transactions (when data is loaded into Workflows), or **select** the default time. *ALWAYS use* the gadget.

![Current Time](image)

8. **Select** a default due date if you want all materials to be due on the same date. Otherwise, **leave the Default Due Date field blank** so that the due date is calculated at the time the offline transactions are uploaded to the server.

![Default Due Date](image)

9. Log Directory points to where the log file will be written as data is collected on the Offline WorkFlows client. This field defaults to the `\Sirsi\Workflows\LOG` directory in Documents and Settings for PC's; defaults to `/Library/Preferences/Workflows/LOG` file for MAC's. **Note:** If using an application such as Deep Freeze that restores the computer when it is rebooted, this directory must be changed to a location that is not affected by the security software or the security software must be disabled.

![Log Directory](image)
10. Barcode validation is checked, to indicate that the barcode validation has been turned on in your database. Please leave this checked (unless you are sure that barcode validation has not yet been turned on). If you are not sure, ask your ITC provider.

<table>
<thead>
<tr>
<th>Barcode Validation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Barcode List:</th>
</tr>
</thead>
<tbody>
<tr>
<td>INFOhio,SIRSI Auto-Gen item, SIRSI Auto-Gen User</td>
</tr>
</tbody>
</table>

11. If a user delinquency file had been previously downloaded into the SirsI/Jwf/Configure directory, the date that the user status file was last generated is displayed. Select the Use User Delinquent List File check box if the delinquency file was recent enough.

<table>
<thead>
<tr>
<th>User status generated on:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mon Jun 12 12:57:16 2006</td>
</tr>
</tbody>
</table>

| Use user delinquent list file |

**NOTE:** If you do not use the user delinquent list file, all users are considered to have OK status. This means that users who currently have a BLOCKED or BARRED status will be able to check out items when Offline WorkFlows is used for circulation transactions. When the Unicorn server becomes available, the transactions for the BLOCKED or BARRED users are transferred to the server at the time the WorkFlows client logged in to the server.

When the Load Offline Transactions (Loadstand) report (ITC staff) is run on the server, the BLOCKED or BARRED user status is first changed to OK. The transactions for the user are added to the Unicorn database, then the user status is returned to BLOCKED or BARRED.

This feature of the report prevents the transactions from failing and the loss of the charge information in libraries that do not use the delinq file.

12. **Click OK** when you have finished entering the session information.

| OK | Cancel |

Note: For more detailed information or specific questions, use HELP wizard.
Offline Register New User

The Offline WorkFlows New User Registration wizard guides you through the process of registering a new user for your library.

1. **Select** Offline toolbar

2. **Select** Offline User Registration wizard

3. **Enter** information about a user in the User Information tab.
4. **Enter** address information, if desired, on the User Address tab.

![User Address Tab](image)

- **Primary**: Choose the desired option (User address 1, User address 2, or User address 3).

- **User address 1**:
  - ATTN
  - ADDRESS
  - CITY
  - STATE
  - ZIP
  - PHONE
  - EMAIL

5. **Enter** additional information, if desired, such as notes and comments, on the User Extended Information tab.

![User Extended Information Tab](image)

- **extended information**:
  - HOMESCHOOL
  - PROGRAM
  - COMMENT
  - NOTE
  - LOSTITEM
  - INACTVID
  - ACTIVEID

6. **Click OK** when you have finished entering the user information.

![OK and Cancel Buttons](image)

**Note**: For more detailed information or specific questions, use HELP wizard.
Offline WorkFlows Checkout Wizard

The Offline WorkFlows Checkout wizard guides you through the process of checking out materials to a library user in an offline mode.

1. **Select** Offline toolbar

2. **Select** Offline Checkout wizard

3. In the Checkout window, **scan** the user's library card (or type full 14-digit user barcode number) to enter the user ID in the **User ID** field.

4. **Scan** the item barcode to enter it in the **Item ID** field.

5. If required, **use** the Calendar gadget to specify a different due date in the **Alternate Date Due** field.

6. **Click Check Out Item to User** to check out the item, or **click Close** to exit the wizard without saving charges.
7. If using the delinq file, check out to BLOCKED, BARRED, SUSPENDED users will NOT be possible (not even overrideable).

8. After all items for a user have been checked out, do one of the following.

- **Click Check Out to New User** to clear the charge list before beginning a checkout for the next user. If WorkFlows is configured to print receipts, a date due slip or charge receipt prints for the current user before the charge list is cleared for the next user.

- **Click Close** to close the Checkout window.

**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 to the Unicorn server. 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 to the server.*

- *If a workstation has a receipt printer, the Offline WorkFlows Checkout wizard properties can be set to print charge slips or date due slips.*

**Note:** For more detailed information or specific questions, use HELP wizard.
Offline Check In

The Offline Check In wizard guides you through the process of checking in materials.

1. **Select** Offline toolbar

2. **Select** Check In wizard

3. **Scan** the item barcode to enter it in the Item ID field

4. **Use** the Calendar gadget to specify the actual date an item was checked in to the library in the Date of checkin field (by default, “today’s” date is displayed).

5. **Click** OK to complete discharge of the item, or **click** Cancel to close the wizard without saving changes.

6. After all items for a user have been checked in, begin scanning item barcodes for the next user, or **click** Cancel to close the Discharging window.

**NOTES:**

- **To refresh the Discharging window,** **click** Clear Discharge List.

- **To sort items in the list of discharges in ascending or descending order,** **click** the column heading of the column you want to sort.

**Note:** For more detailed information or specific questions, use HELP wizard.
Offline Renew Item

The Offline Renew Item wizard guides you through the process of renewing a user's checked out items.

1. Select Offline toolbar

2. Select Renew Item wizard

3. Scan the item barcode to enter it in the Item ID field

4. Use the Calendar gadget to specify an alternate due date for the item (by default, circ rule will determine date due).

5. Click OK to complete discharge of the item, or click Cancel to close the wizard without saving changes.

6. After all items for a user have been checked in, begin scanning item barcodes for the next user, or click Cancel to close the Renew window.

**NOTE:**

*If renewal item is to be due on same date as checkouts are due, renewal can be done via the Check Out wizard.*

**Note:** For more detailed information or specific questions, use HELP wizard.
Offline Circulation ITC Staff - Complete Transactions

NOTE: The following instructions apply to the ITC Staff

When the server becomes available again, the librarian will log into Workflows, and the recorded transactions will immediately be sent to the server. You will receive notification hourly if there is a file to be loaded. That email will say:

Run the Load Offline Transactions report !!!
sirsi@YOURSERVERNAME.org
To: youremailaddress
Email message will read (library code in message will tell you which instance to run this for):

   -rw-r--r--  1 sirsi staff  95 Oct  3 15:11./ML/Unicorn/Standalone/MLHS/standlog.6

_____________________________________________________________________________________

1. When WorkFlows connects to the server, the Documents and Settings/login/Sirsi/Workflows/LOG/Library file (PC) or login/Library/Preferences/Workflows/LOG/Library file (MAC) is automatically transferred to the server as Unicorn/Standalone/Library/standlog.x, where Library is the name of the library at which the transactions were recorded, and x is the station number. The original LOG/Library file on the workstation is removed.

   For example, on workstation number 1, the CIRCMAIN/Sirsi/Workflows/LOG/WASHINGTON file will be transferred to the server as Unicorn/Standalone/WASHINGTON/standlog.1.

2. Run the Load Offline Transactions (Loadstand) report (ADMINISTRATION tab). Each library's standalone.x files are combined, sorted, and processed.

   • Separated reports for District......

   • Sample of Report (note ERROR messages)

Log:

Report Log for Offline Transactions Loaded
Report loadstand scheduled as Load Offline Transactions
Load Offline transactions.

UNICORN application program interface server GL3.1 started on Tuesday, June 13, 2006, 11:11 AM
Transactions will be read from standard input.
Reply transactions will be written to standard output.
Error requests and responses will be logged in /u/sirsi/PLAYS/Unicorn/Standalone.
History logging of requests will be in /u/sirsi/PLAYS/Unicorn/Logs/Hist.
No system logging will be done.
14 transaction(s) read.
10 transaction(s) failed.
UNICORN application program interface server finished on Tuesday, June 13, 2006, 11:11 AM
UNICORN include log printing GL3.1 started on Tuesday, June 13, 2006, 11:11 AM
Log transactions will be read from standard input.
The report will be written to standard output.
20 include log record(s) printed.
UNICORN include log printing finished on Tuesday, June 13, 2006, 11:11 AM
Report Result (error messages) – assign to library staff for resolution:

Log Listing
Produced Tuesday, June 13, 2006 at 11:11 AM

6/12/2006, 15:07:09 Station: CC09 Request: Sequence #: 03 Command: Charge Item
Part B
station login user access: LIEILKHS station library: LMHS station user's user
ID: item ID: 226200000165162 user ID: 22620000158043 master override: Max
length of transaction response: 200000 log format time: 20060612150709

6/12/2006, 15:07:09 Station: CC09 Response: Sequence #: 00 Command: *ERROR*
message: Item not found in catalog message number: 7 workstation operator
alert: 1

6/12/2006, 15:07:14 Station: CC09 Request: Sequence #: 06 Command: Charge Item
Part B
station login user access: LIEILKHS station library: LMHS station user's user
ID: item ID: 226200000320431 user ID: 22620000158043 master override: Max
length of transaction response: 200000 log format time: 20060612150714

6/12/2006, 15:07:14 Station: CC09 Response: Sequence #: 06 Command: *ERROR*
message: Item not found in catalog message number: 7 workstation operator
alert: 1

6/12/2006, 15:07:24 Station: CC09 Request: Sequence #: 09 Command: Discharge Item
station login user access: LIEILKHS station library: LMHS station user's user
ID: item ID: 126200000126443 date of checkin: 06/12/2006 master override: Max
length of transaction response: 200000 log format time: 20060612150724

6/12/2006, 15:07:24 Station: CC09 Response: Sequence #: 09 Command: *ERROR*
message: Item not checked out message number: 11 workstation operator alert: 1

6/12/2006, 15:07:25 Station: CC09 Request: Sequence #: 10 Command: Discharge Item
station login user access: LIEILKHS station library: LMHS station user's user
ID: item ID: 226200000322273 date of checkin: 06/12/2006 master override: Max
length of transaction response: 200000 log format time: 20060612150725

6/12/2006, 15:07:25 Station: CC09 Response: Sequence #: 10 Command: *ERROR*
message: Item not checked out message number: 11 workstation operator alert: 1

3. **Run** the **Consolidate Daily Logs** (Consolidate) report (ADMINISTRATION tab) and the **Statistics Log** (Statlog) report (ADMINISTRATION tab) to add the history logs to the monthly statistics logs.

**NOTE:** If data is loaded the same day as the Offline files were created, the **Statistics Log** will report the following (consider this to be normal):

-----------------------
Report Log for Statistics Log
Report statlog scheduled as Statistics Log
Statistical log file from history transactions.
-----------------------

There were no statprep logs to create statistics from. Please check to see that both of the following are true.
1. Was the library open yesterday? There will be no history logs if no records were created, changed, or removed in Accent, and thus no statprep logs.
2. Was a daily backup or a consolidate report run BEFORE the attempt to run statlog? One of these must be run before statlog to create the statprep logs.

-----------------------
4. Any transactions that could not be processed are moved to the *Unicorn/Standalone/errors* file on the Unicorn server. Errors are reported in the FINISHED REPORT log - examine this file to determine why the transactions failed, assign to library staff for resolution.

5. Offline WorkFlows adds an override code to all transactions. However, certain offline transactions may not load. The following reasons commonly cause offline transactions to fail.
   - User is BLOCKED or BARRED
   - User not found
   - Item not found

6. If the `delinq` file in the `/Sirsi/Standalone` directory on the Unicorn server or in the `\Sirsi\Jwf\Configure` directory on the workstation is not selected, outdated, or missing, the offline transactions for a BLOCKED or BARRED user will still be transferred when the WorkFlows client connects to the server.

7. When the Load Offline Transactions report is run on the Unicorn server, the BLOCKED or BARRED user's status is first changed to OK, and the transactions for the user are loaded into Unicorn. Then the user status is returned to BLOCKED or BARRED. This feature of the report prevents the transactions from failing and the loss of the transaction information in libraries that do not use the `delinq` file.

8. When offline transactions fail, library staff should manually review the transaction and take whatever steps required to best account for the item that is now in the possession of the user. If the user is known, the block may be overridden to check out the item. If the user is not known, the item can be checked out to MISSING.

9. In multi-library sites, a check out at one library and a check in at another library for the same item will always be chronologically sorted so that the check out is processed before the check in.
Offline Circulation - Complete Transactions

When the server becomes available again, you can send the recorded transactions to the server and apply them to the Unicorn databases, as follows:

NOTE: The file of your offline transactions is on the computer in the Documents and Settings of the person who is logged into that computer. (Documents and Settings/staff login/Sirsi/Workflows/LOG/Library file) It is important that the computer be logged in as that same person in order to complete the transactions.

1. Start the Unicorn WorkFlows client

2. Clear the Operate in Offline Mode check box, and click OK.

3. After logging in, be sure to refresh your login toolbar/wizards by clicking on it in the top toolbar.

4. To apply the offline transactions to your database, CONTACT YOUR ITC STAFF.

NOTE: Your provider will receive notification of files to be loaded regularly throughout the day after you have logged in. However, if you want the file to be loaded immediately, contact your provider.

Note: For more detailed information or specific questions, use HELP wizard.
Attendance in the Library

Contact your ITC provider for the URL to the attendance module for your district.

1. Logging in
   a. Click on your district.
   b. Enter your Workflows username and password in ALL CAPS to open the attendance screen.

TIP: Use the password manager to save password information. If multiple people use the same computer, they should all use the same login for attendance, so all the files stay in one directory. See 8e at the end of this document.

2. Settings:

You should select your settings before using the attendance program.

   a. Alert – if you bullet Popup, a message will display when you scan a student who has been suspended from the library or has a delinquent or blocked circ status in Sirsi.
   b. Alt_ID – you must bullet Enabled if you want to use this search option.
   c. Limit to Buildings: Select building(s) you want to search. You can hold the Control key and click multiple buildings.
   d. Attendance by homeroom – bullet Yes if you only want to include rooms in your building.
   e. Bullet yes if you only want to include Student profiles when displaying homeroom lists.
3. Taking Attendance

a. Type a username or scan a barcode into the search box.

b. To search by Alt_ID, click in the Alt_ID box and then type or scan the Alt_ID into the search box.

NOTE: You must enable searching by ALT_ID under the Settings tab.

c. If you leave the attendance module without clicking on Finish, your list will be saved automatically. When you reopen the module, this message will display.

d. If you wish to remove a student from the list, click the X by his name.

e. Click the OUT button to record the time a student leaves the library.

4. Suspensions

a. Click the “!” by the student’s name in the attendance list to suspend him from the library.

b. Click on the drop down list or calendar to select the end date of the suspension.

c. Type suspension reason if desired.

d. Click the Suspend button. A confirmation window will display.

e. Clicking on the Suspensions button, will display current and past suspensions.
5. Attendance by Homeroom
The Homeroom feature allows you enter an entire class of students at once.

a. **Click** on Homeroom on the menu bar.
b. **Select** the homeroom you wish to enter.
c. **Click** OK. A list of students will display.
d. **Click** on the “X” to remove absent students from the list.

6. **Click** on Finish when you are ready to complete your attendance.

7. Reports
   a. **Type** a name for the report or select from the dropdown menu.
   b. **Click** on the file name.
   c. Your report will be a simple text document. **Edit** the report if needed.
   d. **Click** File > Print to print the report.

8. Customizing Reports
   a. **Click** on the reports button.
   b. **Select** the options you want.
c. Your report will look like this:
You can sort the results alphabetically by clicking the header in the Patron / ID column.

<table>
<thead>
<tr>
<th>Student Name</th>
<th>Building - Grade</th>
<th>Room - Teacher</th>
<th>Time In</th>
<th>Time Out</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smith, Alexander</td>
<td>LEHS-11</td>
<td>326-MCDONALD</td>
<td>Thu 09/06/07 08:56 AM</td>
<td>08:57 AM</td>
</tr>
<tr>
<td>Jones, Stephanie</td>
<td>LEHS-09</td>
<td>128-ROBINSON</td>
<td>Thu 09/06/07 08:57 AM</td>
<td>08:57 AM</td>
</tr>
<tr>
<td>Jones, Abby Leigh</td>
<td>LEMS-06</td>
<td>100-PORTER</td>
<td>Thu 09/06/07 09:03 AM</td>
<td>09:03 AM</td>
</tr>
<tr>
<td>Jones, David Lemonye</td>
<td>LEHS-09</td>
<td>103-FABICH</td>
<td>Thu 09/06/07 09:03 AM</td>
<td>09:03 AM</td>
</tr>
<tr>
<td>Jones, Keith Theodore</td>
<td>LEMS-08</td>
<td>137-MCCUNNE</td>
<td>Thu 09/06/07 09:03 AM</td>
<td>09:03 AM</td>
</tr>
</tbody>
</table>

d. If you check Plain Text, your report will look like this:

Page 1
Attendance Report - Generated Mon Sep 10 14:53:40 2007

Student Name | Building - Grade | Room - Teacher | Time In | Time Out |
---------------|------------------|----------------|---------|----------|
Smith, Alexander Louis | LEHS-11          | 326-MCDONALD   | Thu 09/06/07 08:56 AM | 08:57 AM   |
Jones, Stephanie Anita | LEHS-09          | 128-ROBINSON   | Thu 09/06/07 08:57 AM | 08:57 AM   |
Jones, Abby Leigh | LEMS-06          | 100-PORTER     | Thu 09/06/07 09:03 AM | 09:03 AM   |
Jones, David Lemonye | LEHS-09          | 103-FABICH     | Thu 09/06/07 09:03 AM | 09:03 AM   |
Jones, Keith Theodore | LEMS-08          | 137-MCCUNNE    | Thu 09/06/07 09:03 AM | 09:03 AM   |

e. To access old files, click on Files button on main menu.
You can delete or open and print any previous attendance files.

Attendance Functions: 5 files found in /TEST/ADMIN:
- 2007 : 5
  Delete Checked Files

2007
- 09/06 08:56
- 09/10 14:52
- 09/11 10:16
- 09/06 09:03
- 09/11 10:13: Period 1
## Table of Contents

Staff Web

### Section 18

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<th></th>
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<td>Logging In</td>
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<td>Reports</td>
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<td>18.4</td>
<td>Cataloging</td>
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<tr>
<td>18.5</td>
<td>Inventory</td>
</tr>
</tbody>
</table>
Staff Web Logging In

1. **Open** your internet browser (Internet Explorer, FireFox, Safari)

2. **Type** this URL in the browser address box. **Provided by your ITC**

3. **Type** this Host name in the Host box. **Provided by your ITC**

4. **Type** this Port number in the Port box. **Provided by your ITC**

5. **Click** the Connect button.

6. Enter your assigned Workflows User ID.

7. Enter your Workflows password.

8. **Click OK.**
Circulation

Check Out Tab
The Check Out tab is used to check out copies to a patron or to renew copies for a patron.

1. **Scan or type** a patron ID in the Patron ID field. If you do not have the patron ID to scan, **click** Find Patron button.

2. Using the Find Patron button, **Click** the “Identify By” drop down menu to select the search type.

3. In the Search For box, **Type** a letter, partial name or homeroom ID.

   If more than one name matches, a List of matching names screen will display.

4. **Select** from the list of patrons to check out.

   If the patron is blocked, the override screen will display.
If the patron is not blocked, Check out to User screen displays.

5. If you would like to specify a special due date for this patron's checkout or renewal, **click** Due Date button.

6. **Scan** the item barcode or use the Find Item to look up item.

7. To renew an item, select the item title and **click** the Renew button.

To proceed to the next patron select either option:

8. **Click** the Clear button to clear screen and return to Check Out to user screen.

9. **Click** the Return to Search button to return to your search list/find option.

**Check In Tab**

1. **Click** on the Check In Tab to check in items.

2. To use the Quick Check In option, Click the box to activate.

3. The **Quick Check In** option allows you to rapidly check in copies or receive copies from transit without having to process exception messages. You can check in or receive all of the copies first, then go to the list of checked-in copies to click the **view** glossary in the Exception column for any item that needs further processing.

4. The **view** glossary is a link you can click to display the exception message window that applies to the item. When you display the exception message window, you can either process the message (**click OK** or **Yes**) or close the message without processing it.
5. **The exception history is retained** until you click Clear on the Check In screen to clear the list of checked in or received copies. **Do not click Clear** until you have processed all of the exception messages.

6. **Click** the Print Exceptions button to display/print a list of the exception items and their message.

Process options that will be held for processing.

- Make a hold available
- Item has multiple pieces
- Incremented the in-library use count
- Item is not charged
- Item has a status of MISSING
- Item was claimed lost or assumed lost
- Put an item in transit

7. **Scan or type** the item ID into check in.

8. **Click** the Change Date button to change the date of check in.

9. If Quick Check In option is not selected, a pop up screen will display with Item process information.

**Patron Status Tab**

The **Patron Status** tab displays information about patrons and their checkouts, holds, and fines. From this tab, you can also perform various circulation functions for the patron, including renewing copies, filling holds, and accepting payment for fines.

1. **Checkouts** - displays a list of the copies the patron currently has checked out. You can renew copies for the patron using this list. **Select** the title and click the Renew button.

**Note:** *Double-click the item ID of an item in the checkouts list to move automatically to the Item Status tab and view information about the selected item. Click the Patron Status tab to return to the patron’s list of checkouts.*

**Note:** *Use the scroll bar, on the right side of the screen, to move down the screen to access the holds and fines options.*

**Clear button** - Clears the screen of patron information so you can view the patron status of another patron.

**Return to Search** - If the Find Patron search returned multiple patrons, this button will allow you to return to the list of patrons after selecting one from the list.
2. **Holds** - displays a list of holds for the patron. You can display hold information, edit holds, remove holds, and fill holds for the patron using this option. To place a hold, use the Holds wizard.

3. **Fines** - displays a list of fines for the patron. You can create a new fine, display fines, assess fines, and pay fines for the patron using these options.
   - **Select** the line with the fee you wish to pay. **Click** either Pay Fine or Pay Total Fines button.
   - **Select** New Fine to create a bill.

### Item Status Tab

The Item Status tab displays information about an individual item and the hold queue for that copy. In this tab, you can change the copy's current status, and manage holds for a copy.

1. **Scan or type** the Item ID or use the Find item button to look up item.
2. Using the Find item button, **Select** your Identify by search option. **Type** your search term and click **Select**. If a list displays, select the correct title.

   *Item information screen displays.*

3. Information about the item displays. You may choose to do any of the following.
   a. **Click Lost** to mark an item as Lost. This option is available only if the item is currently checked out.
   b. **Click Missing** to mark an item as Missing.
   c. **Click Claimed Returned** to mark an item that a patron claimed to have returned. This option is available only if the item is currently checked out.
4. If the item does not have any holds, the following message displays. 
   **This copy has no holds.**
   a. If the item has holds, the hold queue for the item displays. You can manage holds for the item by selecting an item in the hold queue list, and doing any of the following.

   i. **Click Display Hold** to see more information about the selected hold.
   ii. **Click Edit Hold** to modify information for the selected hold.
   iii. **Click Remove Hold** to remove the selected hold.

**Holds Tab**

1. **Scan or type** the patron ID or use the Find Patron button.
2. To place a hold on a title or copy, **click** the appropriate button.

After you select a title or copy, the Place Hold window displays.

3. **Select** the appropriate information and click **OK**.

**Clear button** - Clears the screen of patron information so you can view the patron status of another patron.

**Return to Search** - If the Find Patron search returned multiple patrons, this button will allow you to return to the list of patrons after selecting one from the list.

**Maintain Patrons Tab**

The Maintain Patrons tab is used to manage patron records. Use this tab to do the following tasks.

1. Create a patron record. **Scan, paste, or type** a dumb patron ID in the Patron ID box.

The following message displays:

**Patron does not exist. Do you wish to add a new patron?**

   a. **Click Yes.**

   Patron Details screen displays.
b. **Type or select** the requested information in the fields.  

**Click Save** when finished.

Other Options:

2. **Display** an existing patron record. Enter a search term and search type. **Click Select**

3. **Renew** a patron’s library privileges. On the patron screen, **Click** the Renew button next to the Privilege Expire.

4. **Duplicate** or copy an existing patron record. **Click** the Duplicate button and enter information.

5. **Modify** an existing patron record. **Click** the information box and make your change. Then **Click** Save.

6. **Delete** an existing patron record. Find your patron and **Click** the delete button.

**Inventory Item**

Inventory Item creates a physical inventory list of items by entering item IDs and updates the Times Inventoried counter and the Date Inventoried field in the item record.

1. In the Item ID box, Scan the barcode. A list of inventoried items appears. This list includes the call number, copy number, and ID of each item.

2. The insertion point automatically returns to the Item ID box as each item is added to the list.

3. Inventory Item also displays special status information about an item.

   a. Item is currently on hold.
   b. Item has an outstanding hold.
   c. Item is in transit for a hold.
   d. Item is claimed or assumed lost.
   e. Item is MISSING.
   f. Item is checked out.
   g. Item is not in the catalog.

You can sort items in the List of Items Inventoried in ascending or descending order. Click the column heading of the column you want to sort.

For the COMPLETE inventory process directions, see Inventory Item section of the Staff Web documentation.
Staff Web Reports Wizard Group

Staff Web reports are limited to the Sirsi provided reports only. You can not access your Workflows reports from the Staff Web or your Staff Web reports in Workflows.

1. Click on the report you wish to setup and run.

2. Select your criteria for the report. Use the drop down menus and date gadgets to limit your results. To select all data for that field, leave the boxes blank. The less criteria selected the more information on the report.
   a. Select the sorting option.
   b. Click the fields to display on the report.
   c. Click the Run Now button when done.

   NOTE: Make sure to scroll down the screen to see all the available options for the report.

3. You will see the report running icon.
When the report is finished, your Finished options screen will display.

a. View Results - your report will open in web html format.
b. Download the Results (save to your computer).
c. Options –
   i. Select type of report to display,
   ii. sort order,
   iii. fields to display on report,
   iv. Message options.
d. Discard Results – You will need to discard each report to have access to additional reports.
e. Close – Turn off Finished report results.

c. Screen display for Output Options

You may return to this option to make changes at any point before you view/save/print report.
Finished Reports – You may now access your previously run reports using the Finished Report Tab.

1. **Click** on the report you wish to view or save.

2. **Select your option:**
   - **View** – the report in your selected format and options.
   - **Download** – allows you to save the report on your computer.
   - **Discard** – will remove the report from your finished report screen.

3. **Select** your Report Output Options:
   - Report formats allows you to select your type of report as listed and then open or save the report in the format you select.
   - Some reports allow you to change the sorting and selected fields before you view, print or save the report.

4. **Click** Select or Cancel.
Staff Web Cataloging

The Maintain Title/Copy tab is used to add new and edit existing titles and copies.

1. **Select** the information Tab you wish to work with.
   a. Title Information
   b. Copy Information
   c. MARC Information

Modify Item or Add New Copy

Copy Information Tab
2. **Click** the Find button
3. **Select** your type of search.
4. **Type or scan** your Search For term.
   
   List of titles will display

5. **Select** the Item you would like to work with.
6. **Click** the Select button.
   
   Your information screen displays, ready for changes.

7. **Click** the drop down menus to edit the information And/OR
8. **Click** in the text box to change the information.

9. **Click** New Copy button to add a new copy of this item.

10. Select from Options:
    a. Save – to save your changes.
    b. Duplicate – Copies the currently displayed title record.
    c. Delete – Permanently removes the title record and all of its associated copies.
    d. Use Find – to return to search options.
Modify or Add a NEW Title Record
Title Information Tab

11. **Click** the Title Information Tab.

*Screen displays with Template BOOK selected*

ADD New Title

12. Enter your Title information in the appropriate fields.

**NOTE:** Use the scroll bar to access all of the fields available.

13. Diacritics options

**NOTE:** You may click back and forth between the Title and Marc Information tabs and use both for entering data to this title.

14. **Click** Save when finished.

Modify a Title

15. **Click** the Find button to select your title.

*Screen displays with the options at the top*

16. **Click** in the appropriate text box to modify your information.

17. **Click** the Save button to save your changes.

18. **Click** Clear button to remove the entry information.

19. Options
   a. Add New button - to enter a new Title.
   b. Find – to search for another title.
   c. Duplicate – to duplicate this title
   d. Delete – to remove this title.
StaffWeb Inventory

- Basic inventory reports are available in StaffWeb.
- This will be an interactive inventory using the Inventory Wizard.
- Use your inventory Worksheet provided to track your inventory process.

Pre-Inventory 1) Missing Copies List - run your missing report using the Inventory Date Before Report.
   a. Click on Inventory Reports – 3. Inventory Date Before report
   b. Select the Status of MISSING with no inventory date.
   c. Click run report.

Pre-Inventory 2) Transit Items – run your transit list using the Inventory Date Before report. Check your shelves for transit items and check in any items if necessary.
   a. Click on Inventory Reports – 3. Inventory Date Before report
   b. Select the Status of INTRANSIT with no inventory date.
   c. Click run report.

Inventory Process

1. **Run** Set Inventory Date Report – This will inventory checked out items.

2. **Scan** items into inventory
   a. Click on Circulation tab
   b. Select Inventory Copy wizard
   c. Scan your items into the Inventory wizard.

You must watch the screen, as you scan, for special information messages. You will be prompted for an action before continuing to scan.
   a. Item is currently on hold.
   b. Item has an outstanding hold.
   c. Item is in transit for a hold.
   d. Item is claimed or assumed lost.
   e. Item is MISSING.
   f. Item is checked out.
   g. Item is not in the catalog.
   h. Item belongs to another library.
Inventory Reports

Click on Reports Tab – Inventory Reports

3. Run Inventory Date Before report for each item group scanned – This is a listing of all the items that were NOT included in the current inventory scan (possible missing items).
   a. Select your library code.
   b. Select your Item Group in Copy Profile.
   c. Select your Inventory Date before (This is the first date you entered on your worksheet when you started scanning your items for this inventory)

Note: You may only select one Copy Profile (Item Group) on each report.

If you find an item on this report, scan the item in the Inventory Copy wizard.

Sample Report

```
Inventory Date Before

<table>
<thead>
<tr>
<th>Call Number</th>
<th>Title</th>
<th>Copy ID</th>
<th>Date inventoried</th>
</tr>
</thead>
<tbody>
<tr>
<td>B COU</td>
<td>Cousteau, the captain and his world / Richard Munson.</td>
<td>31614007079594</td>
<td>6/9/2009</td>
</tr>
<tr>
<td>B LEO</td>
<td>DaVinci, Leonardo.</td>
<td>31614007081655</td>
<td>6/9/2009</td>
</tr>
</tbody>
</table>
```

**Complete all Item Groups using the above methods. Run the report the last time with the Copy Profile blank for a list of all items in the library not scanned.

Finalizing the Inventory Process after all item groups have been scanned.

These items will be changed to item status MISSING

4. Run the Checkout to Missing report.
   a. Select your library code.
   b. Select your Date Inventoried Range.
      i. First Run - Select Test mode – this will generate a list of items that will be marked Missing.
      ii. Second Run - Select Update mode - to change the database items on the list to Missing.

5. Run a Missing Copies list - run your missing report using the Inventory Date Before Report (as in Pre-Inventory Step 1).
   a. Click on Inventory Reports – 3. Inventory Date Before report
   b. Select the Status of MISSING with no inventory date.
   c. Click run report.
### Step 1

**Set Inventory Date Report**

<table>
<thead>
<tr>
<th>Example: 5/2/07</th>
<th>Fiction</th>
<th>5/2/07</th>
<th>FIC A</th>
<th>FIC M</th>
<th>fictiona-m.txt</th>
<th>5/2/07</th>
<th>5/2/07</th>
</tr>
</thead>
</table>

---

### Step 2

**Item Group**

- Fiction
- Non-Fiction

**Date Scanned**

- 5/2/07
- 5/3/07

**First Item Call #**

- FIC A
- FIC M

**Last Item Call #**

- FIC M
- FIC A

**File Name / Notes**

- fictiona-m.txt
- fictiona-m.txt

**Scanner Transfer Wizard**

- 5/2/07
- 5/3/07

**Load Scanned Barcodes Report**

- 5/2/07
- 5/3/07

---

### Step 2a

In Finished Reports, when viewing and/or printing inventory reports, put check mark in the view Log box.

---

### Step 3

**Items not on Shelf**

<table>
<thead>
<tr>
<th>Date</th>
<th>Item Group</th>
<th>Items NOT in Inventory Report (Reconcile)</th>
<th>For found items use Other Tasks – Inventory Wizard</th>
<th>Checkout to Missing for LIST Update Database NO</th>
<th>Checkout to Missing to Declare Update Database YES</th>
<th>New Missing Copies List Report</th>
</tr>
</thead>
</table>

---

### Step 3a

Complete Steps 4-5 when entire library is scanned.

---

### Step 4a

**Check this list carefully**

- All Items finalized in database

**Step 4b**

**Step 5**

**Items declared Missing**

- Items not on Shelf

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*Last Updated July, 2010*