



SirsiDynix Symphony 3.2

Academic Reserves Training Guide

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Table of Contents

Introduction	1
Overview.....	1
Who should attend?.....	1
Prerequisite.....	1
Course Objectives	1
Academic Reserves Record Structure.....	2
Reserves Toolbars and Wizards	3
Reserves Toolbars.....	3
Common Tasks Toolbar	4
Reserve Information and Maintenance Toolbar	5
Course Information and Maintenance Toolbar	6
User Information and Maintenance Toolbar.....	7
Item Information and Maintenance Toolbar.....	8
Session Settings Wizard	9
Getting Started.....	11
Overview.....	11
Creating Instructor Records	11
Basic Info Tab.....	14
Privilege Tab.....	15
Demographics Tab	16
Addresses Tab.....	17
Extended Info Tab	19
Create Course Records.....	20
Duplicate Course Information	23
Creating Reserve Records.....	27
Overview.....	27
Creating Reserve Records.....	28
Understanding Reserve Status Relationships	33
Reserve Record Status	33
Individual Instructor/Course Reserve Record Stage	33
Reserve Item Status	33
Displaying Reserve Information.....	35
Helpers	36
Displaying Reserve Information in iLink/iBistro	38
Lookup Items on Reserve by Instructor.....	39
Look up Items on Reserve by Course Number	39
Lookup Items on Reserve by Course Name	39

<i>Charging and Discharging Reserve Material</i>	41
Overview	41
Checking Out Reserve Materials	41
Renewing Reserve Materials	43
Checking in Reserve Materials	44
<i>Additional Reserve Functions</i>	45
Overview	45
Instructor Copy	46
Electronic Reserves	49
Borrowing from Another Branch Library	51
Borrowing from a Library Outside Your System	53
<i>Modifying Reserve Information</i>	57
Overview	57
Display Course Information Wizard	58
Modify Course Wizard	60
Modify Reserve Wizard	62
Modify Individual Instructor/Course Information	64
Individual Reserve Wizard	64
Global Editing	68
Taking Items Off Reserve	71
<i>Removing Reserve Information</i>	75
Overview	75
Remove Individual Instructor/Course Information	76
Remove Reserve Wizard	78
Remove Course Wizard	80
<i>Reserve Group Reports</i>	83
Overview	83
Report Selection Criteria	84
Reserve Control Selection	85
Reserve Selection	89
Course Selection	91
Taking Items Off Reserve in Batch	92
Set Reserves to Inactive Report	92
Reserves Reshelving List Report	92

Put Items On Reserve in Batch	93
List Reserve Control Records Report.....	93
Instructor Reserve Notices Report	93
Set Reserves to Prepare Report	94
Reserves Pickup List, Update Report.....	95
Set Reserves to Active Report	95
Receive Reserve Materials.....	96
Additional Reports.....	97
List Individual Reserves Report.....	97
List Reserve Desk Holds	97
Recall for Reserve Notices Report	97
Reserves Overdue Notices Report.....	97
Reserves Pickup List Report	98
Reserve Usage By Call Number Report.....	98
Set Reserves to Select Status Report.....	98
Reserves Policies.....	99
Overview.....	99
Reserve Configuration Toolbar.....	99
Course Term Policy	100
Attributes.....	100
Reserve Desk Policy.....	102
Attributes.....	102
Extended Info Format Policy	105
Appendix A – Follow-up Activities.....	107
Overview.....	107
Activities.....	107
Activity 1	107
Activity 2	107
Activity 3	107
Activity 4	107
Activity 5	108
Activity 6	108
Solutions	109
Activity 1	109
Activity 2	112
Activity 3	113
Activity 4	116
Activity 5	117
Activity 6	118
Appendix B – Terms to Know.....	119
Terms to Know.....	119
Index	125

Introduction

Overview

The main purpose of a reserve desk is to maintain a special collection of materials circulated to students in specific courses. Items in this reserve collection may be from the library's main collection or may be loaned to the library from an instructor or through interlibrary loan. The physical location of circulating reserve material is usually restricted to the library itself. The loan period of reserve material is often short (one to two hours) to allow access by the largest number of students.

This guide explains how the WorkFlows Academic Reserve module manages items in the library's reserve collection.

Who should attend?

This course is intended for Academic Reserves department managers, system managers, and other Academic Reserves staff.

Prerequisite

Symphony Essential Skills – This training course introduces SirsiDynix Symphony 3.2 WorkFlows. This course teaches basic skills including navigating WorkFlows, searching techniques, changing toolbars, keyboard navigation, and using the Help file.

Course Objectives

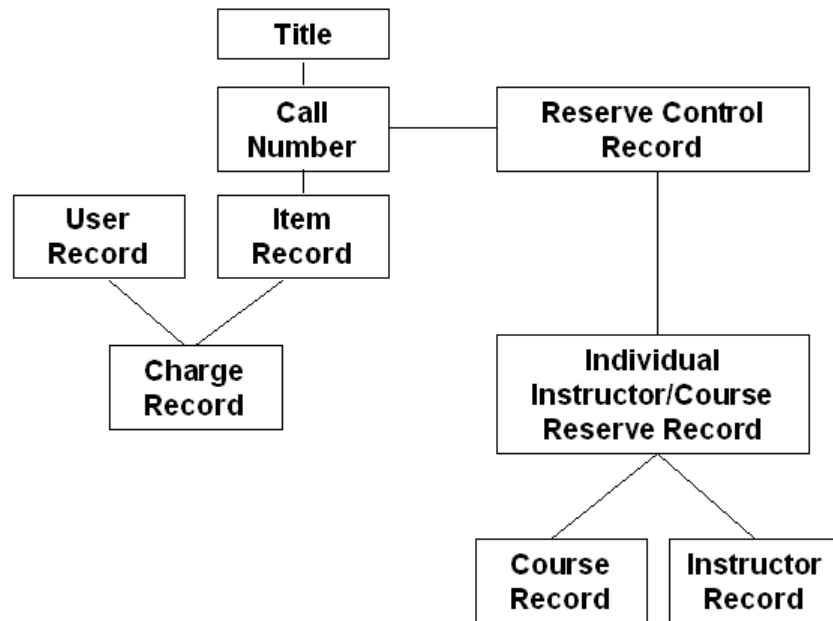
After completing this course, you will be able to:

- Create the components of a reserve record
- Distinguish between the records involved: instructor (user), course, item, and reserve
- Understand the concepts of status/stage/item status combinations
- Schedule reports to automate the process of returning and collecting reserve desk items
- Access online help as needed

Academic Reserves Record Structure

It is important to understand the various types of records required and how they are linked together in order to successfully put material on reserve.

- An instructor who has material on reserve must have a SirsiDynix Symphony 3.2 user record. (This may be the same as the instructor's patron record.)
- A course that has material on reserve must have a SirsiDynix Symphony 3.2 course record.
- Material to be placed on reserve must have an item record.
- Once records are in place for the instructor, course, and item, you can create a reserve record. The reserve record holds information such as how long the item can circulate from the reserve desk, if an alternate circulation rule will apply, and if the reserve is active or inactive.
- An individual instructor/course reserve record keeps track of a particular instructor/course combination. One reserve control record might have multiple individual reserve records if an item is on reserve for more than one instructor or more than one course.
- Just as with standard checkouts, patrons must have user records in the SirsiDynix Symphony 3.2 system before they can check out any item placed on reserve.

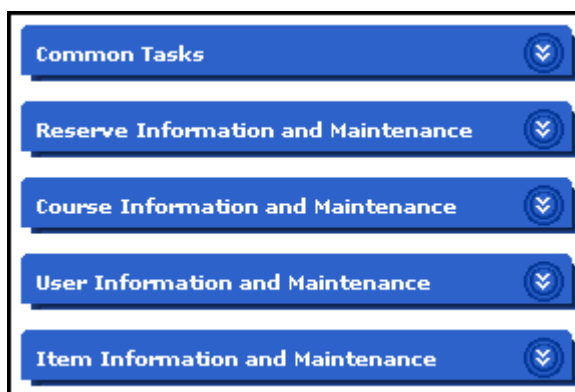


Reserve record relationships

Reserves Toolbars and Wizards

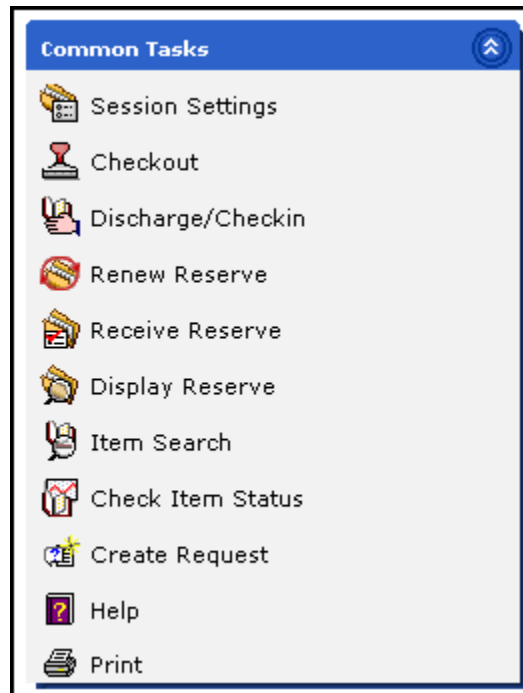
You can access Academic Reserves wizards from the Reserves toolbar. The Reserves toolbar includes some of the wizards from the Circulation toolbar. This makes it easy for you to handle circulation tasks at the reserves desk (for example, check-out and check-in material, register a new user, and create a brief title). This training guide primarily addresses the wizards specific to Academic Reserves.










Reserves Toolbars



Common Tasks	Contains wizards that check-out and check-in items, renew items, and search for items.
Reserve Information and Maintenance	Contains wizards that create, modify, and remove reserves.
Course Information and Maintenance	Contains wizards that create, modify, display, duplicate, and remove courses.
User Information and Maintenance	Contains wizards that display, create, modify, and remove user records, bill a user, pay bills, and all functions pertaining to holds.
Item Information and Maintenance	Contains wizards that display item information, change location/barcode, and use/remove items.

Common Tasks Toolbar



	Session Settings	Sets the reserve desk defaults for the current session
	Checkout	Checks out items to a user.
	Discharge/Checkin	Checks in items returned by a user.
	Renew Reserve	Extends the period that a user may keep a particular reserve item. Receives an item with a reserve copy status of PICKUP for the reserve desk, and to change the copy status to ON RESERVE.
	Receive Reserve	Sets the status of an item based on the status of the reserve record.
	Display Reserve	Displays reserve information.
	Item Search	Identifies a specific title in your library and display information at the title, call number, and item level.
	Check Item Status	Displays the current status of an item.
	Create Request	Creates a new request, such as for an address change, immediate hold, or interlibrary loan.

**Help**





Opens context-sensitive Help and displays the associated Help topic for the active window.

**Print**

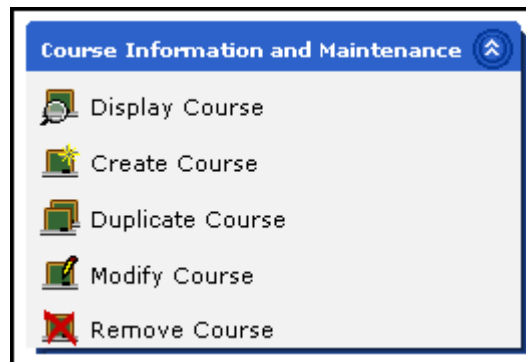
Prints screen text to workstation's default printer.






Reserve Information and Maintenance Toolbar



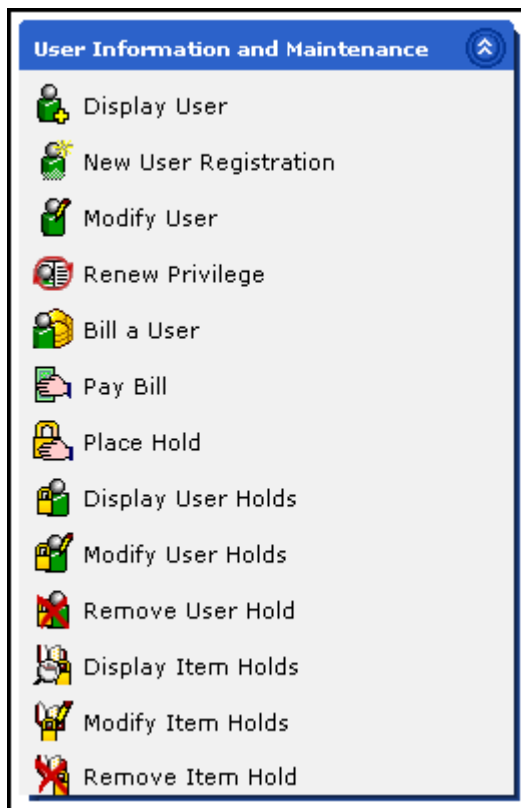
Wizard	Description
	Create Reserve – This wizard allows you to create a reserve record.
	Individual Reserve – This wizard allows you to add or remove individual instructor/course reserve records from the reserve record.
	Modify Reserve – This wizard allows you to modify reserve records and/or individual instructor/course reserve records.
	Remove Reserve – This wizard allows you to remove all reserve information associated with an item, course, or instructor.









Course Information and Maintenance Toolbar








Wizard	Description
	Display Course – This wizard allows you to display the course ID, name, terms, and number of students.
	Create Course – This wizard allows you to create a course record indicating the course ID, name, terms offered, and number of students.
	Duplicate Course – This wizard allows you to duplicate a course record's description, terms offered, and number of students.
	Modify Course – This wizard allows you to modify a course record indicating the course ID, name, terms offered, and number of students.
	Remove Course – This wizard allows you to remove course information from the database.

User Information and Maintenance Toolbar

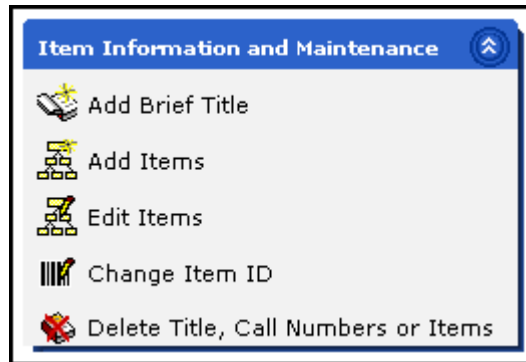







Wizard	Description
	Display User – This wizard allows you to display user records.
	New User Registration – This wizard allows you to add a user record for a new user.
	Modify User – This wizard allows you to change information in a user record.
	Renew Privilege – This wizard allows you to extend or renew a user's library privileges.
	Bill a User – This wizard allows you to create a record for money owed by the user to the library.
	Pay Bill – This wizard allows you to accept payment for a user's bill(s).
	Place Hold – This wizard allows you to hold an item for a user.
	Display User Holds – This wizard allows you to display all holds for a user.

Wizard	Description
	Modify User Holds – This wizard allows you to modify holds for a user.
	Remove User Hold – This wizard allows you to select a hold to remove from a list of user holds.
	Display Item Holds – This wizard allows you to display all holds on an item.
	Modify Item Holds – This wizard allows you to modify a hold associated with an item.
	Remove Item Hold – This wizard allows you to select a hold to remove from a list of item holds.

For more information about the User Information and Maintenance wizards, refer to the WorkFlows Online Help.

Item Information and Maintenance Toolbar



Wizard	Description
	Add Brief Title – This wizard allows you to add a brief title, call number, and item to the catalog.
	Add Items – This wizard allows you to add items to existing call number/title records.
	Edit Items – This wizard allows you to edit items attached to existing call number/title records.
	Change Item ID – This wizard allows you to change an item ID.
	Delete Title, Call Numbers, or Items – This wizard allows you to delete a title, call number, or item.

For more information about the Item Information and Maintenance wizards, refer to the WorkFlows Online Help.

Session Settings Wizard

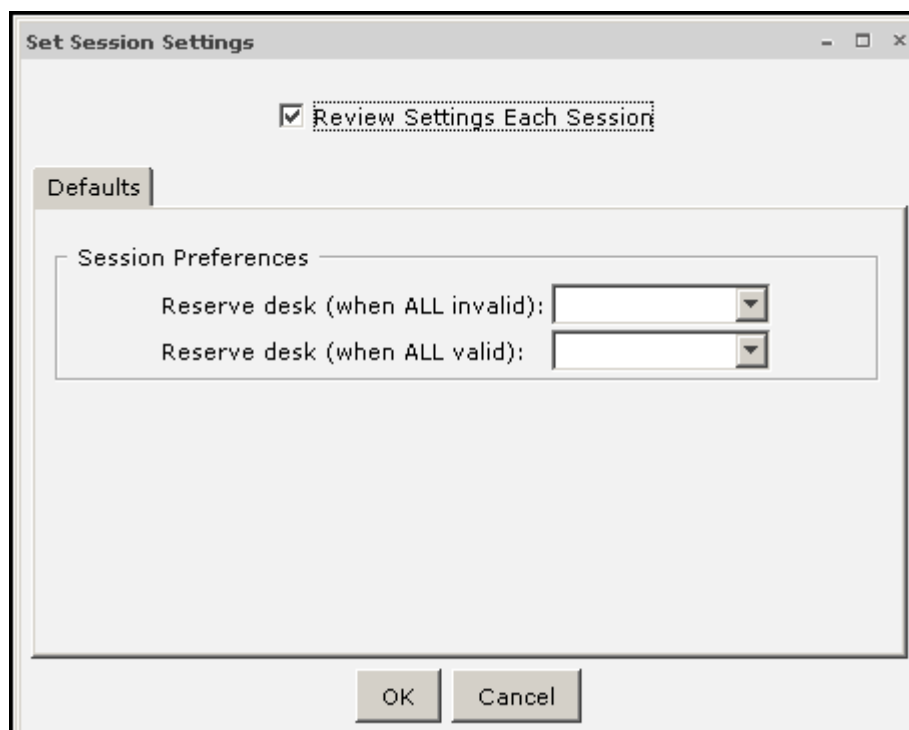
The Session Settings wizard sets specific property-type settings for a range of wizards during your WorkFlows session. The values in the session settings behave in the same way that properties behave. If you save properties when exiting, your session settings are saved for use in the next WorkFlows session.

To set the session settings:

1. On the Common Tasks toolbar, click the **Session**



Settings wizard. The following window appears:



2. In the **Reserve desk (when ALL invalid)** box, select the reserve desk from the list. When you create reserves, you must select one reserve desk where the material will be kept. In this case, ALL is an invalid choice. Set your preference based on where the material will be kept.

3. In the **Reserve desk (when ALL valid)** box, select the reserve desk from the list, or select **ALL**. When you look up reserves, you can specify a particular reserve desk or search for the material at all reserve desks. In this case, **ALL** is a valid choice. Set your preference based on where you want to search for the reserve material.
4. Click **OK**.

Getting Started

Overview

Certain types of records must be in place before you can create the reserve record:


- Instructors who have material on reserve must have SirsiDynix Symphony 3.2 user records. (This may be the same as the instructor's patron record.)
- Courses that have material on reserve must have SirsiDynix Symphony 3.2 course records.

Creating Instructor Records

When using the Reserves module, all instructors must have a user record in SirsiDynix Symphony 3.2. This user record performs a dual function. In regards to circulation, the instructor's user record and an item record are linked to a charge record when material is checked out. For reserves, the instructor's user record and the course record are linked to the reserve record so students can look up items on reserve by their instructor's name. All students checking out reserve material must also have a user record in SirsiDynix Symphony 3.2.

To create an instructor record:

1. On the User Information and Maintenance toolbar, click

the **New User Registration** wizard . The following window appears:

New User Registration : Set Properties

Display property page: Wizard Startup Never

Defaults

Library: Profile name:

Addresses

Primary address flag: Address 1 Address 2 Address 3

Demographics

User cat1: User cat2:
 User cat3: User cat4:
 User cat5: Department:
 Birth date:

Outreach

Route:
 Total items limit:

OK Cancel

2. Verify the defaults and click **OK**. The following window appears:

New User Registration

User ID:

Profile name:

OK Cancel

3. Select a **Profile name** from the list. A profile is the user policy that determines a user's privileges, like loan period and fine rate. The SirsiDynix Symphony 3.2 administrator establishes profiles. For this example, we will use FACULTY.
4. Scan the user's barcode or type the user ID.
5. Click **OK**. The following window appears:

New User Registration

User ID: 89013 **NAME-NOT-YET-SUPPLIED** Profile name: FACULTY...

Basic Info | Privilege | Demographics | Addresses | Extended Info

Last name, first: **NAME-NOT-YET-SUPPLIED**

Title:

Alt ID: Allow routing

Group ID:

Library: ARROWOOD

Profile name: FACULTY

Register User Modify Register Another User Close

Basic Info Tab

1. In the **Last name, first** box, type the user name in the format indicated. The separating comma tells the software how to print names in Notice reports. For names with suffixes, the correct format is:

Smith Jr., Joe

2. **Title** is an optional entry (e.g., Mr or Ms). Do not use punctuation. SirsiDynix Symphony 3.2 automatically supplies the period when printing the title in Notice reports.
3. You can use the **Alt ID** box to enter a unique number such as a driver's license number. If the user does not have their library card but would like to check out a book, the circulation desk staff can look up the user by the alt ID to check out the item.
4. Select the **Allow Routing** check box if your library routes periodicals in-house.
5. **Group ID** links members of a named group such as a department or a family. Group ID is searchable and can be used to display all users associated with that ID.
6. Select the registration **Library** associated with the user's card.
7. Verify the **Profile name**. This information carries over the value entered from the previous screen.

Privilege Tab

New User Registration

User ID: 89013 Bishop, Stewart (Dr) Profile name: FACULTY...

Basic Info **Privilege** Demographics Addresses Extended Info

Privilege expires: NEVER

PIN: 3061 Override:

Status: OK

Claims returned: Override:

Web auth id:

Register User Modify Register Another User Close

1. SirsiDynix Symphony 3.2 automatically assigns the **Privilege Expires** date based on the user's profile.
2. The **PIN** box may be necessary for patrons using the OPAC. PIN changes require an **Override**.
3. The default **Status** is **OK** for a new user. Depending on the patron's activity, this status can change.
4. Use the **Claims Returned** and **Override** boxes to record the number of times a customer claims to have returned a book that cannot be located. Manual changes require an override.
5. The **Web auth id** box may contain a "Web authentication key" from the centralized authentication server. This ID works behind the scenes to verify that the user is authorized to use library services.

Demographics Tab

The screenshot shows a window titled "New User Registration" with a standard Windows-style title bar. Below the title bar is a header area containing a small icon of three people and a text box with the following information: "User ID: 89013", "Bishop, Stewart (Dr)", and "Profile name: FACULTY...". Below this is a tabbed interface with five tabs: "Basic Info", "Privilege", "Demographics", "Addresses", and "Extended Info". The "Demographics" tab is currently selected. The form contains several input fields: "User cat1:" through "User cat5:" are each followed by a dropdown menu; "Department:" is followed by a text box; "Birth date:" is followed by a date picker icon; and "Age:" is followed by a text box. At the bottom of the window are four buttons: "Register User", "Modify", "Register Another User", and "Close".

Information on the Demographics tab is optional. This information categorizes users for statistical purposes.

Addresses Tab

New User Registration

User ID: 89013 Bishop, Stewart (Dr) Profile name: FACULTY...

Basic Info | Privilege | Demographics | **Addresses** | Extended Info

Primary: Address 1 Address 2 Address 3

Address 1

DAYPHONE
LINE
STREET
CITY/STATE
ZIP
COUNTY
EMAIL
LOCATION

1. Enter up to three **Addresses**.
2. Click **Address 1**, **Address 2**, or **Address 3** to specify the **Primary** address. The system uses the primary address when running notice reports.
3. If you want to e-mail notices (like Overdue Notices), be sure to type the patron's full e-mail address in the **EMAIL** box.



NOTE Your SirsiDynix Symphony 3.2 administrator controls the fields that display in the address template. If you need additional fields, ask your SirsiDynix Symphony 3.2 administrator to modify the Address policy. Do not modify the template from this window.

Extended Info Tab

The screenshot shows a window titled "New User Registration" with a user icon in the top-left corner. Below the icon is a header bar containing the text: "User ID: 89013", "Bishop, Stewart (Dr)", and "Profile name: FACULTY...". Below this is a tabbed interface with five tabs: "Basic Info", "Privilege", "Demographics", "Addresses", and "Extended Info". The "Extended Info" tab is active and contains a toolbox with three icons: a left-pointing arrow, a right-pointing arrow, and a red 'X' delete icon. Below the toolbox is a list of ten fields, each with a dropdown menu and a text input field:

NOTE	
COMMENT	
LOSTITEM	
NOTIFY_VIA	
PREV_ID	
PREV_ID2	
STAFF	
SSN	
STUDENT_ID	
BIRTHDATE	

At the bottom of the window are four buttons: "Register User", "Modify", "Register Another User", and "Close".


This tab has text fields including **Notes** and **Comments** for additional user information. Only staff members using WorkFlows see both Notes and Comments. To remove a note once it has been entered, use the delete tool in the toolbox.

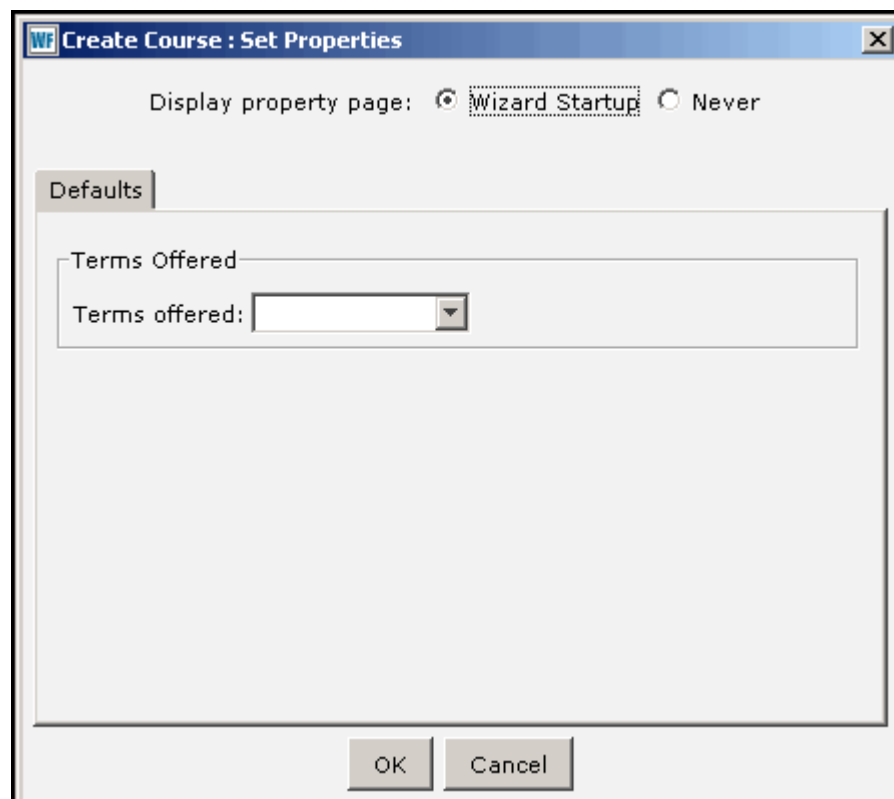
1. Click **Register User** to create the user record.
2. After the new user is registered, click **Register Another User** to repeat the process, or click **Close**.

Create Course Records

Each course that requires reserve items must have a course record. SirsiDynix Symphony 3.2 links the course records with individual instructor/course reserve records. This link allows SirsiDynix Symphony 3.2 to associate items located at a specific reserve desk with specific courses and instructors. Because SirsiDynix Symphony 3.2 cannot associate an item with a course until a course record exists in the SirsiDynix Symphony 3.2 database, course records must be created before any reserve records are created.

To create a new course record:

1. On the Course Information and Maintenance toolbar, click the **Create Course** wizard .
2. If the Set Properties window appears, verify the defaults and click **OK**.



The following window appears:

Identify course

Course ID:

Basic Information | Extended Information

Create Course | Modify | Another | Cancel (r) | Close

3. Type a course ID and click **Create Course**. The following window appears:

Basic Information | Extended Information

Course ID: LIT 250

Course name: Women's Literature 1900-1950

Terms offered: FALL

No. of students: 25

Create Course | Modify | Another | Cancel (r) | Close

4. Provide the following information on the Basic Information tab.
 - Course name
 - Terms offered
 - Number of students
5. Click the Extended Information tab, and enter additional information, such as notes or comments.

The screenshot shows a window titled "Create Course" with two tabs: "Basic Information" and "Extended Information". The "Extended Information" tab is active. Inside this tab, there is a section labeled "Extended Info" containing three icons (a square with a plus sign, a square with a minus sign, and a square with a red X), followed by two rows of input fields. The first row has a dropdown menu labeled "NOTE" and an empty text box. The second row has a dropdown menu labeled "COMMENT" and an empty text box. At the bottom of the window, there are five buttons: "Create Course", "Modify", "Another", "Cancel (r)", and "Close".

6. Click **Modify** to save the course information.
7. Click **Close** to exit this window, or make another choice as needed.

Duplicate Course Information

Once you create a course record, you can easily create similar course records. The **Duplicate Course** wizard automatically copies values from one course record to another, which is useful when creating course records for several sections of the same class.

Example

A university has 20 sections of Women's Literature, and each section has the same course information except the section number. Using the Duplicate Course wizard to create the 20 course records would be much faster than using the **Create Course** wizard for each one.

To duplicate an existing course record:

1. On the Course Information and Maintenance toolbar,



click the **Duplicate Course** wizard. The following window appears:

Duplicate Course

Identify course


Course ID:

New Course ID:

Current: [LIT 250-A --- Women's Literature 1900-1950](#)

Basic Information | Extended Information

Duplicate Course | Modify | Another | Close

2. Type the course ID of the course you want to duplicate. If you don't know the course ID, click the Course Search helper  to help you locate it. You can also click **Current** (if available) to duplicate the course you just created.
3. Type a course ID for the new course record and click **Duplicate Course**. The following window appears:

Duplicate Course

Basic Information | Extended Information

Course ID: 250-B

Course name: Women's Literature 1900-1950

Terms offered: FALL

No. of students: 25

Duplicate Course | **Modify** | Another | Close

The information that displays on the Basic Information and Extended Information tabs contain the same values as the original course record.

4. Change the course information as needed and click **Modify**.
5. Click **Close** to exit this window, or click **Another** to repeat the process.

Creating Reserve Records

Overview


Creating reserve records provides location and circulation information about the call number and items needed for reserve. Creating individual instructor/course reserve records provides information about the instructor and course that is needed for the reserve items. Each individual instructor/course reserve record must be linked with a reserve record.

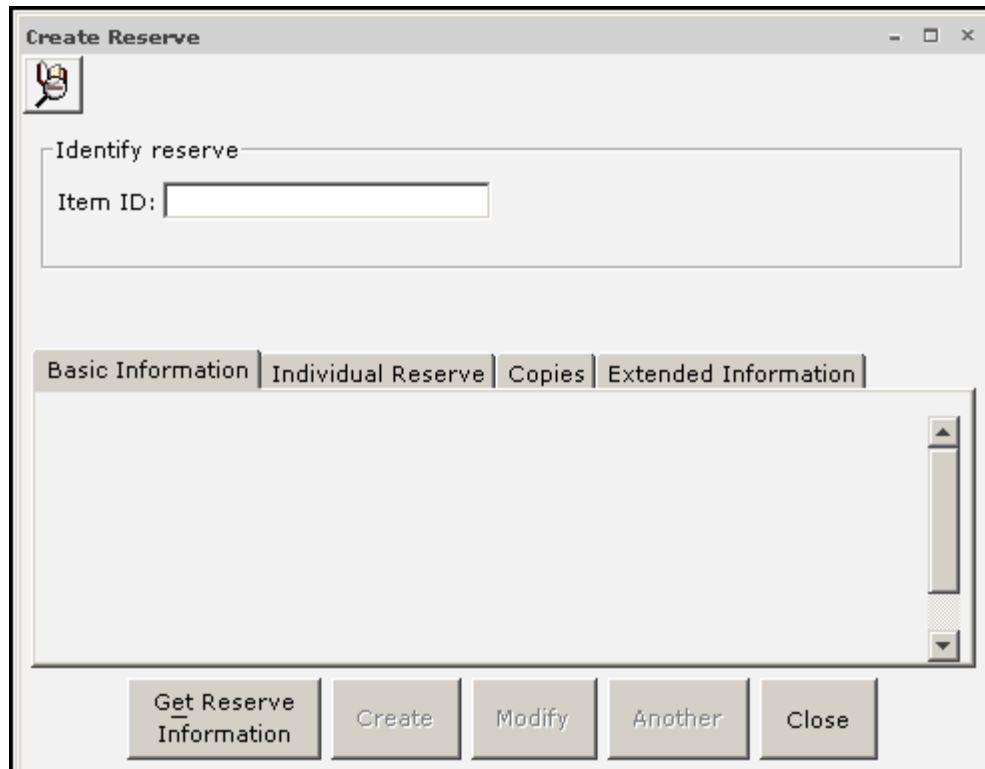
Both the reserve record and the individual instructor/ course reserve records contain information that influences the status of the reserve items. These status values can change during the process of placing and removing reserves. However, before creating reserve records, the items needed at the reserve desk must be identified. Once it is determined which items are needed at the desk, reserve records and individual instructor/course reserve records can be created for these items.

If an instructor needs items to be placed on reserve, the instructor must request that the library find the items and create reserve records.

Creating Reserve Records

To create a new reserve record:

1. On the Reserve Information and Maintenance toolbar, click the **Create Reserve** wizard .
2. If the Set Properties window appears, verify the default settings and click **OK**. The following window appears:



The screenshot shows a dialog box titled "Create Reserve". At the top left is a small icon of a book. Below it is a section labeled "Identify reserve" containing a text input field with the label "Item ID:". Below this section are four tabs: "Basic Information", "Individual Reserve", "Copies", and "Extended Information". The "Basic Information" tab is selected. At the bottom of the dialog box are five buttons: "Get Reserve Information", "Create", "Modify", "Another", and "Close".

3. Scan the item's barcode or type the item ID and click **Get Reserve Information**. The following window appears:

Identify reserve

Item ID: 31000234571851

Basic Information | Individual Reserve | Copies | Extended Information

Homespun heroines and other women of distinction / Brown, Hallie Q. (Hallie Quinn), d. 1949.

Desk: RESERVES

Placed:

Circulation rule: 14DAY Expires(MM/DD/YYYY):

Allow manual circ rule:

Copies needed:

Auto select copies:

Status: DORMANT Keep copies at desk:

Get Reserve Information Create Modify Another Close

4. On the Basic Information tab, provide the following information:
 - In the **Circulation rule** box, select the name of the primary circulation rule that is used when charging reserved materials.
 - In the **Expires** box, click the gadget to select a date. This is the date that individual copies are released from the Reserve Desk (usually at the end of a course term). This is a required entry.
 - **Alt circ rule** – Contains the name of the alternate circulation rule to use when charging reserved items within the specified minutes before closing, as defined in the Reserve Desk policy. For example, an item on reserve has a 2-hour circulation rule. A student wants to check out the item but the circulation desk is closing in 30 minutes. Instead of being allowed only 30 minutes, the student could keep the item overnight.



NOTE The Reserve Desk policy must be set up to allow use of alternate circulation rules and manual circulation rules. Please refer to the Policies section of this training guide for more information.

- **Allow manual circ rule** – When selected, allows an exception to be made for an item at a given reserve desk and allow any valid circulation rule to be manually entered in the Alt Circ Rule field. If not selected, you cannot manually set a circulation rule when charging a reserved item.
- **Copies needed** – This information is especially helpful if you use reports to pick up items from the shelves and return items.
- **Auto select copies** – If selected, SirsiDynix Symphony 3.2 will automatically place a hold on the items needed if they are checked out. If you select this option, be sure to set Copies needed to a number greater than zero (one or more). This is required in order for reports to run properly.
- **Status** – Select a status from the drop-down list. Select **Current** to place material on reserve.
- **Keep copies at desk** – Select this if you want to physically keep the items at the reserve desk, even when they are not on reserve.

WF Create Reserve

Identify reserve

Item ID: 4066-1001

Basic Information | Individual Reserve | Copies

Hoover Power Plant amendments of 1992 : hearing before the Subcommittee on W... / Unite

Desk: RESERVES

Placed:

Circulation rule: 2HOUR Expires(MM/DD/YYYY): 12/15/2004

Alt circ rule: Allow manual circ rule:

Copies needed: Auto select copies:

Status: CURRENT Keep copies at desk:

Get Reserve Information Create Modify Another Close

5. Click the **Individual Reserve** tab and provide the following information.
 - Identify an instructor, using the Display User List gadget.
 - Select the **Stage** from the drop-down list. Select **Active** to place material on reserve.
 - Identify a course ID, using the Course Lookup gadget to find the course.
 - Type an expiration date or use the Calendar gadget for the **Expires** box. This field is required.

Identify reserve
Item ID: 4066-1001

Basic Information Individual Reserve Copies

Instructor ID: 23156789 Stage: ACTIVE
Course ID: BIO 201 Expires(MM/DD/YYYY): 12/15/2004

Get Reserve Information Create Modify Another Close

6. Click the **Copies** tab and select a new status from the list. If all copies will be placed on reserve, select **ON RESERVE** from the **New status for all copies** drop-down list. If selected copies will be placed on reserve, select **ON RESERVE** in the New Status column for each item.
7. Click **Create**. The new status will appear in the Reserve Status column.

Identify reserve
Item ID: 4066-1001

Basic Information Individual Reserve Copies

New status for all copies: ON RESERVE

Copy	Item ID	Home Loch	Curr Loch	Reserve Sta...	New Status
1	4066-1001	STACKS	RESERVES	ON RESERVE	

Get Reserve Information Create Modify Another Close

After successfully creating a reserve record, you can review and modify the created reserve information just created, create another reserve record, or close the Create Reserve wizard.

Understanding Reserve Status Relationships

Each reserve record, individual instructor/course reserve record, and reserve item within the individual instructor/course reserve record has a Status or Stage field.

Reserve Record Status

By using the call number to associate the reserve record with the physical materials, the Status field in the reserve record reflects what is happening to the materials being placed on reserve or being removed from reserve.

- Current** At least one item linked to this record is available for circulation as a reserve item from the reserve desk.
- Dormant** No materials associated with this reserve record are currently on reserve, though these materials may have been on reserve in the past.

Individual Instructor/Course Reserve Record Stage

The Stage field in the individual instructor/course reserve record reflects how soon the items will be posted to the reserve browse index, and consequently, how soon students will be able to check out these items.

- Active** Library staff has gathered the materials associated with individual instructor/course reserve records that have this status. These records are posted to the reserve browse index, and public users can search and view copies by course ID, course name, and/or instructor name.
- Inactive** The title does not currently need to be on reserve for the specified course and instructor.

Reserve Item Status

The Status field on the reserve item reflects what is happening to each item being placed on or being removed from reserve.

- On Reserve** The specified item is currently at the reserve desk and available for students to check out. This item is on reserve for at least one individual instructor/course reserve record.
- Not on Reserve** The specified item is not on reserve.

The Status and Stage fields work together to determine if material is on reserve or not on reserve. The chart below shows valid combinations of the Status and Stage fields.

	Reserve Record Status	Individual Instructor/ Course Reserve Record Stage	Reserve Item Status
ON RESERVE	Current	Active	On Reserve
OFF RESERVE	Dormant	Inactive	Not on Reserve

When reports are used to automate the process of placing material on reserve or off reserve, other statuses and stages will be used. For more information about reserve statuses and stages, please refer to the Help topic “About Reserve Status and Stage Relationships.”

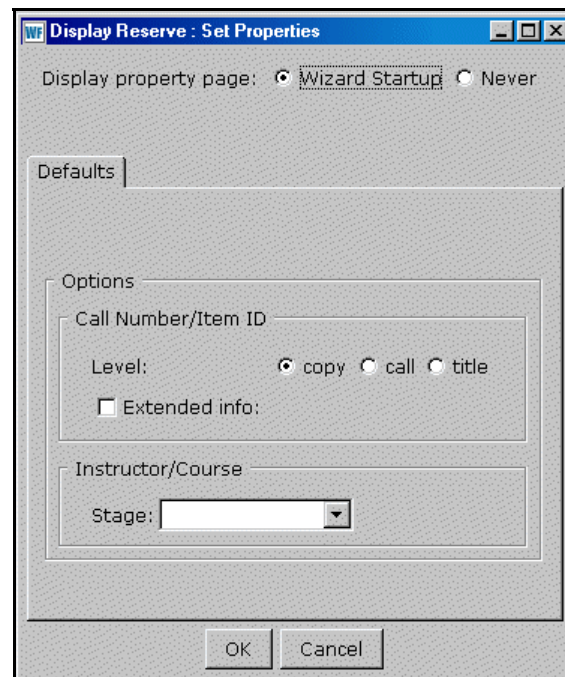
Displaying Reserve Information

The Display Reserve wizard displays all individual instructor/course reserve records as well as parent information from the reserve record associated with these individual reserves.

To display reserve information by searching on the item



1. Click the **Display Reserve** wizard.
2. If the Set Properties window appears, verify the defaults and click **OK**.



3. Scan the item's barcode or type the item ID and click **Get Reserve Information**.

Identify reserve

Item ID: 33201000402318

Basic Information | Individual Reserve | Copies

Fire and ice : the Cascade volcanoes / Harris, Stephen L., 1937-

Desk:	RESERVES		
Placed:	6/29/2004	Expires:	7/31/2004
Circulation rule:	14DAY_FAC		
Copies needed:	0	Allow manual circ rule:	N
Status:	COLLECT	Auto select copies:	N
Total charges:	0	Keep copies at desk:	N
		# ACTIVE/PREPARE reserves:	1

Get Reserve Information | Another | Close

- Review the information on the Basic Information, Individual Reserve, and Copies tabs.

After reviewing the displayed information, you can look up information about another reserved item or close the Display Reserve wizard.

Helpers

The following helper properties can only be seen and changed by your system administrator.

Helpers display in the upper-left corner in a wizard and provide additional searching options. The following helpers are available in the Display Reserve wizard.

- Item Search allows you to search for the item by author, title, and other indexes.
- Reserves Search allows you to search for material by course or instructor.

The Start with Search Helper option allows you to automatically open the Reserves Search Helper as the first step in the Display Reserve wizard.



NOTE In order to do the following procedures, the system administrator must select to the Start with Search Helper option in the Set Properties window.

Search by instructor to display reserve information



1. Click the **Display Reserve** wizard.
2. If the Set Properties window appears, verify the defaults and click **OK**.
3. Click the **Keyword** or **Browse** option.
4. Select **Instructor Name** as the index.
5. Enter a name and click **Search**.
6. The List of Instructors window appears. Select an instructor and click **Continue**.
If a list of courses appears, select a course and click **Continue**.
7. The reserves information appears for review.

After reviewing the displayed information, you can look up information about another reserved item or close the Display Reserve wizard.

Search by course ID or course name to display reserve information



1. Click the **Display Reserve** wizard.
2. If the Set Properties window appears, verify the defaults and click **OK**.
3. Click the **Keyword** or **Browse** option.
4. Select **Course ID** or **Course Name** as the index.
5. Enter the course ID or course name and click **Search**.
 - If you entered the full course ID or course name, the reserves information appears for review.
 - If you entered part of the course ID or course name (e.g., ENG instead of ENG101), a list of courses appears. Select a course and click **Continue**. The reserves information appears for review.

After reviewing the displayed information, you can look up information about another reserved item or close the Display Reserve wizard.

Displaying Reserve Information in iLink/iBistro

Students, faculty, and staff can search for items that have been placed on reserve for a specific instructor or course using iLink/iBistro. This screen lets you perform three different searches as shown in this illustration:

Lookup Items on Reserve

Search for

Lookup Items on Reserve by Instructor

Lookup Items on Reserve by Course Number

Lookup Items on Reserve by Course Name

[Place Academic Reserve Request](#)

desk:

Once you enter a search, and click the appropriate button, either a hit list or single full record appears. For example:

Full Reserve View: Smith, David M. for Introduction to American History

[Item Information](#) [Catalog Record](#)

The American promise : a history of the United States
Roark, James L.

Publisher: Bedford/St. Martin's,
Pub date: c2000.
Pages: xxxvi, 874, 50, 56 p. :
ISBN: 0312191995
Copy info: 1 reserve copy available. 1 copy total on reserve.
1 copy total in all locations
A Look Inside: [URL](#) [URL](#)

Holdings

E. A. Arrowood Foundation Library	Copies	Material	Reserve desk	Circ rule	Location
E178.1 .A49367 2000	1	BOOK	Reserve Collection	Circulates for 2 hours/10 cents per hour	RESERVES

At the top of this screen, the instructor name and course name/number appears followed by specific information about the item on reserve.

Lookup Items on Reserve by Instructor

1. Type the instructor's name (last name, first name) in the **Search For** box. A partial name search can be performed.
2. Click **Lookup Items on Reserve by Instructor**.
 - If a list of instructors appears, select the instructor by clicking the instructor's name.
 - If the instructor has material on reserve for more than one course, select the course by clicking the course name or course ID.

Look up Items on Reserve by Course Number

1. Type the course number in the **Search For** box. You can type part of the course number to retrieve a browse list of courses (e.g., type ENG instead of ENG101).
2. Click **Lookup Items on Reserve by Course Number**.

If a list of courses appears, select the course by clicking the course name or course ID.

Lookup Items on Reserve by Course Name

1. Type the course name in the **Search For** box. You can type part of the course name to retrieve a browse list of courses (e.g., type English instead of English Composition).
2. Click **Lookup Items on Reserve by Course Name**.

If a list of courses appears, select the course by clicking the course name or course ID.

Charging and Discharging Reserve Material

Overview


Once the records (reserve record, user record, item record, and individual instructor/course reserve record) are created, the reserve materials can be circulated. The following wizards are used during the circulation process:

- The Checkout wizard is used to check out reserved items.
- The Renew Reserve wizard allows you to renew reserved materials that are currently checked out.
- The Discharge/Checkin wizard is used to check in reserved items.

Checking Out Reserve Materials

The Checkout wizard checks out an item placed on reserve. Both a user ID and an item ID are required to check out an item. SirsiDynix Symphony 3.2 then determines the due date and time for the item, based on information in the Reserve Desk policy and reserve record.



1. Click the **Checkout** wizard .
2. Scan the user's library card or type the user ID and click **Get User Information**.
3. Scan the item barcode or type the item ID and click **Check Out Item to User**. The checkout information appears on the List of Checkouts.

User ID: 1933554517 Huck, Brian Profile name: STUDENT...

Identify user
User ID: 1933554517

Identify item
Item ID:

List of checkouts: 1

Title	Item ID	Date Due	Billed	Type
A treasury of g...	33201000123...	8/26/2004,13:...		BOOK

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

After successfully checking out an item, you can continue to check out items for this user, check out items to a new user, or close the Checkout wizard.



NOTE If a workstation has a receipt printer, the Checkout wizard can be used to print date due slips.

Renewing Reserve Materials

The Renew Reserve wizard can be used to check out a reserve item after the initial charge, extending the loan period. Since the reserve item is currently checked out to the user requesting a renewal, the amount of time the item can be borrowed is simply extended. Because reserve materials are in high demand, your library may choose to limit the number of renewals allowed.



1. Click the **Renew Reserve** wizard.
2. Scan the item's barcode or type the item ID and click **Get Reserve Information**.
3. Review the displayed information on the Basic Information, Individual Reserve, Copies, and Extended Information tabs.
4. Click **Renew** to extend the loan period.

Renew Reserve

Identify reserve

Item ID: 60805-1001

Basic Information | Individual Reserve | Copies | Extended Information

The Rap/English Translation Dictionary

Desk: RESERVES
 Placed: 12/16/2004 Expires: 5/16/2005
 Circulation rule: 2HOUR
 Copies needed: 0 Auto select copies: N
 Status: CURRENT Keep copies at desk: N
 Total charges: 1 # ACTIVE/PREPARE reserves: 1

Get Reserve Information Renew Another Close

After successfully renewing an item, you can renew another reserved item or close the Renew Reserve wizard.



NOTE If a workstation has a receipt printer, the Renew Reserve wizard can be used to print date due slips.

Checking in Reserve Materials

The Discharge/Checkin wizard guides you through the process of checking in materials.



1. Click the **Discharge/Checkin** wizard.
2. Scan the item's barcode or type the item ID and click **Discharge Item**.
3. Review the title and routing information.
4. Continue checking in items. Click **Clear Discharge List** to reset the List of Discharges area.

Title	Item ID	Route/Transit To	Amount Billed
A treasury of great ...	33201000123468	RESERVES	



NOTE If a workstation has a receipt printer, the Discharge/Checkin wizard can be used to print hold, transit, or reshelving slips.

Additional Reserve Functions

Overview

During the course of a day, different scenarios may occur that require additional steps be performed or different fields completed. This chapter covers the instructions for the more common tasks. This includes:


- Creating an item record for an instructor's copy and putting it on reserve.
- Creating an item record for electronic reserves and putting it on reserve.
- Placing material owned by another library on reserve.

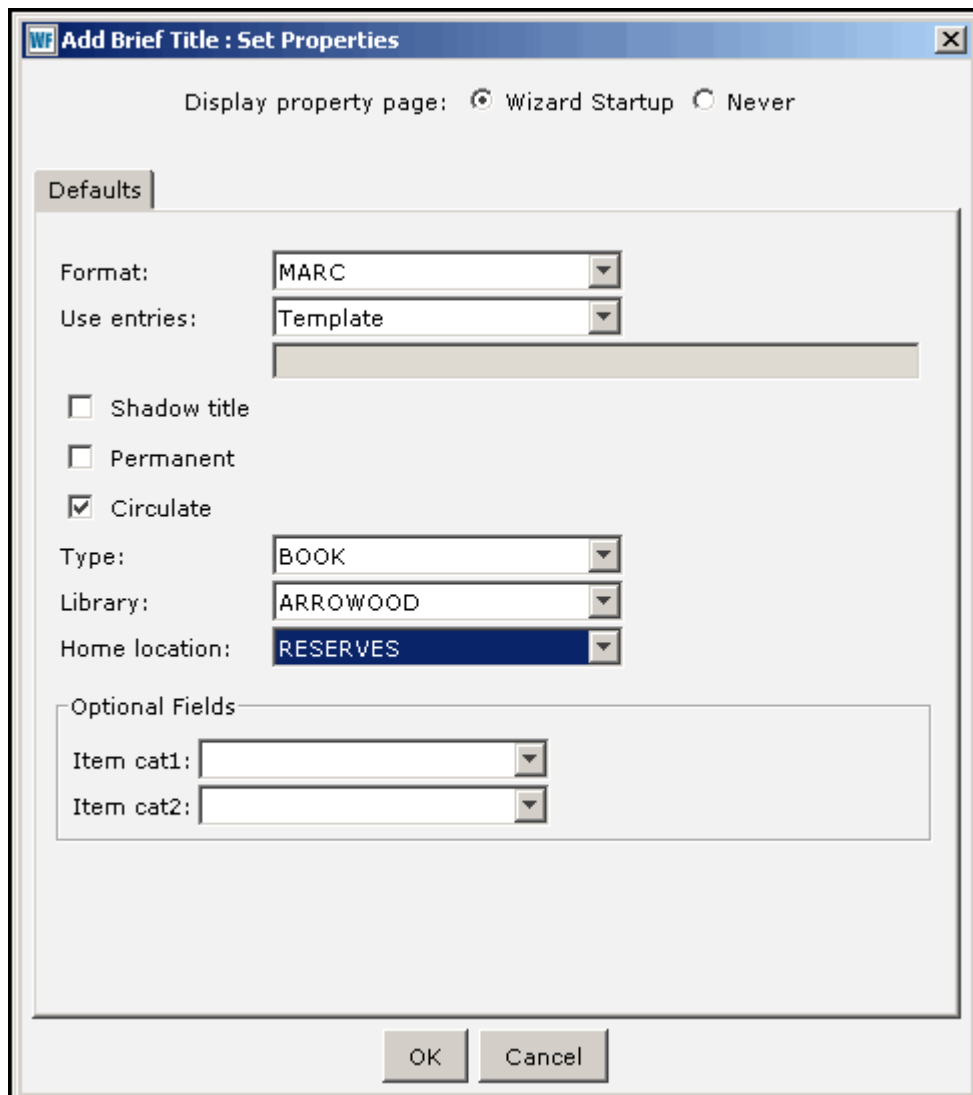
Instructor Copy

Sometimes an instructor will use his personal copy for a reserve item. Since this item is not a permanent part of the library's collection, it requires a slightly different setup when creating the item record.

To place an instructor's personal copy on reserve:

1. On the Item Information and Maintenance toolbar, click

the **Add Brief Title** wizard . The following window appears:



Add Brief Title : Set Properties

Display property page: Wizard Startup Never

Defaults

Format:

Use entries:

Shadow title

Permanent

Circulate

Type:

Library:

Home location:

Optional Fields

Item cat1:

Item cat2:

OK Cancel

2. The selection in the **Use entries** box determines the fields available in the Add Brief Title window. For this exercise, select **Template**.
3. Verify that **Shadow title** is not checked.
4. Verify that the **Permanent** option is not checked.
5. Set the **Home Location** to **Reserves**.
6. Verify the remaining defaults, and click **OK**. The following window appears:

The screenshot shows the 'Add Brief Title' window with the following content:

****REQUIRED FIELD****
 XX(36250.1) ID:36250-1001

Title info

Personal Author:	100	1	Ferguson, Mary Anne
Title:	245		Images of Women in Literature
Publication info:	260		
Physical descrip:	300		
General Note:	500		This is the instructor's copy
Contents Note:	505		
Summary:	520		
Local note:	590		
Subject term:	650		

Call number and copy info

New call number:	XX(36250.1)
Library:	ARROWOOD
Item type:	BOOK
Home location:	RESERVES
Item ID:	36250-1001
Item cat1:	
Item cat2:	

Buttons: Add Brief Title (o), Add Another Title, Make More Changes, Cancel, Close

7. Type the **Title** (required) and **Personal Author** (optional).
8. In the **General Note** box, type a note to identify this copy as belonging to the instructor.

9. Complete the remaining fields as needed.
10. Click **Add Brief Title**.
11. Click **Close** to exit the window.
12. Click the **Create Reserve** wizard.
13. Continue with the Create Reserve process.

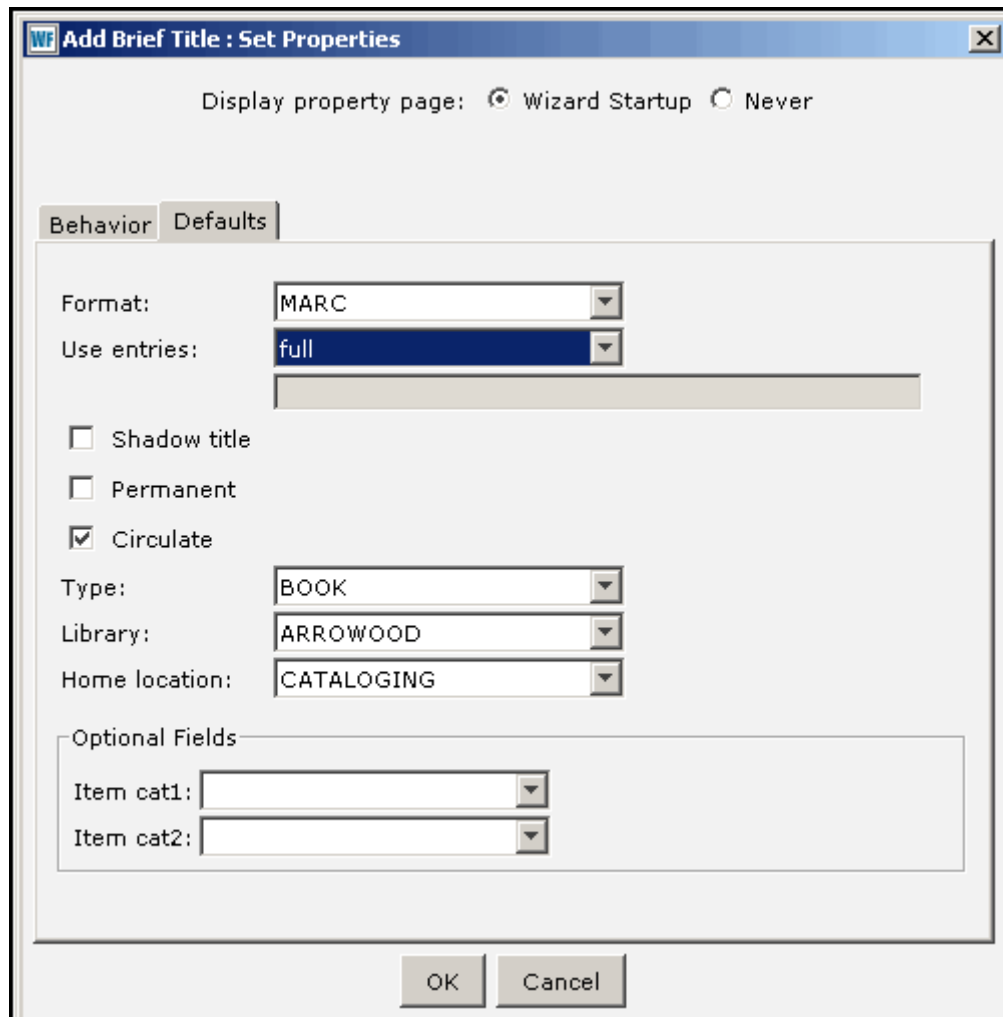
Electronic Reserves

You can add a URL to a bibliographic record to create an electronic reserve. This may be helpful if an instructor has online articles that would be too big to print. It also provides all reserve information in one place. It is also useful when accessing an article database that is restricted to library patrons.

To create an electronic reserve:

1. On the Item Information and Maintenance toolbar, click

the **Add Brief Title** wizard . The Set Properties window appears:



Add Brief Title : Set Properties

Display property page: Wizard Startup Never

Behavior Defaults

Format:

Use entries:

Shadow title

Permanent

Circulate

Type:

Library:

Home location:

Optional Fields

Item cat1:

Item cat2:

OK Cancel

2. The selection in the **Use entries** box determines the fields available in the Add Brief Title window. For this exercise, select **Full**.
3. Verify the remaining defaults, and click **OK**. The Add Brief Title window appears as described previously.
4. Type the **Title** (required) and **Personal Author** (optional).
5. In the **Electronic access** field (856), type the URL address.

Add Brief Title

Added author: 710

Conference author: 711

Uniform title: 730

Added title: 740

Electronic access: 856 | http://www.sirsidynix.com

Call number and copy info

New call number: XX(36256.1)

Library: ARROWOOD

Item type: BOOK

Home location: CATALOGING

Item ID: 36256-1001

Add Brief Title (o) Add Another Title Make More Changes Cancel Close

6. Complete the remaining fields as needed.
7. Click **Add Brief Title**.
8. Click **Close** to exit the window.
9. Click the **Create Reserve** wizard.
10. Continue with the Create Reserve process.

Borrowing from Another Branch Library

If the copies needed for reserve are not located in your library's collection, you can get them from another library within the SirsiDynix Symphony 3.2 system. Send an Academic Reserve request to the owning library to initiate the process.

The owning library charges the item to the requesting reserve desk user, which will automatically set the item's current location to "Intransit." When the item arrives at the borrowing library, the item is discharged and routed to the borrowing reserve desk.



NOTE The appropriate policies and user records must be in place. SirsiDynix delivers one reserve desk user in your system. If your library has multiple reserve desks, your system administrator will create additional reserve desk users.

To borrow an item from another branch library:

At the loaning branch

1. Check-out item to the borrowing reserve desk user. A dialog box appears confirming the item is in-transit.
2. Ship the item to the borrowing branch.

At the borrowing branch

3. Receive the item using the **Receive Items Intransit** wizard (on the Circulation toolbar).
4. Create a reserve record using the **Create Reserve** wizard. Set the item status to On Reserve.
5. Route the item to the reserve desk.



NOTE Do not set the reserves item status to any value except On Reserve or Not On Reserve since the item belongs to another library.

If your library has one item of a call number placed on reserve but needs to borrow a second item of the same call number from another library, create a second reserve record using the item ID. The item ID distinguishes between the two items with the same call number and routes the borrowed item back to its owning library.

Borrowing from a Library Outside Your System

If the copies needed for reserve are not located in the library's collection, you can get them from a library outside the SirsiDynix Symphony 3.2 system. If the item is available through interlibrary loan, create a temporary title, call, and item catalog record for each item, using the **Add Brief Title** wizard. Define the home location as the borrowing reserve desk.



NOTE For more information about the Add Brief Title wizard and the procedure for creating a record, refer to the WorkFlows Online Help.

To borrow an item from a library outside your system:

1. On the Item Information and Maintenance toolbar, click

the **Add Brief Title** wizard



. The following window appears:

WU Add Brief Title : Set Properties

Display property page: Wizard Startup Never

Defaults

Format: MARC

Use entries: brief

Shadow title

Permanent

Circulate

Type: BOOK

Library: ARROWOOD

Home location: RESERVES

Optional Fields

Item cat1:

Item cat2:

OK Cancel

2. Verify that the **Shadowed title** option is not checked.
3. Verify that the **Permanent** option is not checked.
4. In the **Home Location** box, select **Reserves**.



NOTE The selection in the **Use entries** box determines the fields available in the Add Brief Title window.

5. Verify the remaining defaults and click **OK**. The following window appears:

Add Brief Title

****REQUIRED FIELD****
 XX(36317.1) ID:36317-1001

Title info

Personal Author:	100	1	Arrowood Library
Corporate Author:	110	1	
Conference Author:	111	1	
Uniform title:	130		
Title:	245		History of Embroidery

Call number and copy info

New call number:	XX(36317.1)
Library:	ARROWOOD
Item type:	BOOK
Home location:	CATALOGING
Item ID:	36317-1001
Item cat1:	
Item cat2:	

6. In the **Personal Author** box, type the name of the loaning library.
7. In the **Title** box, type the title of the item.
8. Complete the remaining fields as needed.
8. Click **Add Brief Title**, and then click **Close** to exit the window.
9. Click the **Create Reserve** wizard.
10. Continue with the Create Reserve process.

Modifying Reserve Information

Overview

This chapter explains how to view and modify reserve information using the following wizards:

- The **Display Course** wizard lets you view course information.
- The **Modify Course** wizard lets you make changes to course records.
- The **Modify Reserve** wizard lets you make changes to reserve records and take items off reserve.
- The **Individual Reserve** wizard creates an additional instructor/course reserve record for an existing reserve record.

Display Course Information Wizard

The **Display Course** wizard displays information about courses that use reserved material such as course information, course ID, terms the course is offered, and number of students enrolled in the course.

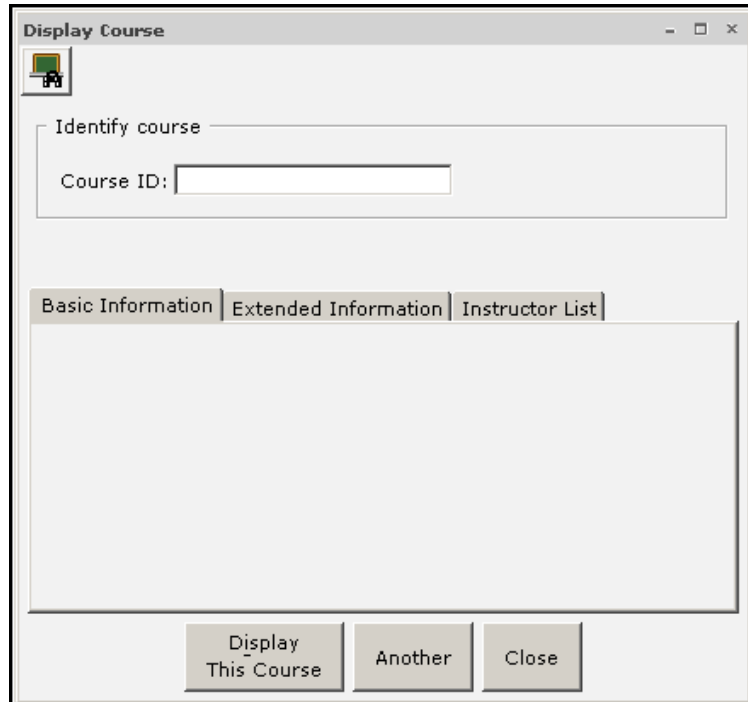
To display course information:

1. On the Course Information and Maintenance toolbar,



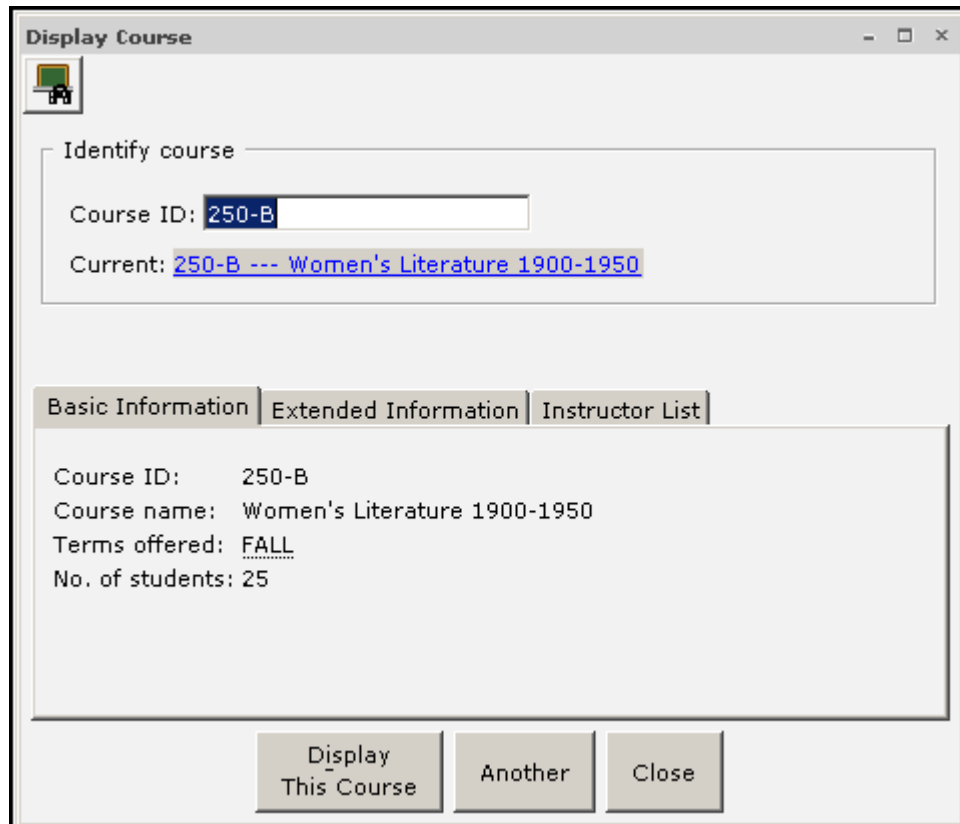
click the **Display Course** wizard

2. If the Set Properties window appears, verify the defaults and click **OK**. The following window appears:

A screenshot of the 'Display Course' wizard window. The window has a title bar with the text 'Display Course' and standard window controls. Below the title bar is a small icon of a computer monitor. The main area of the window is divided into sections. The first section is labeled 'Identify course' and contains a text input field with the label 'Course ID:'. Below this is a tabbed interface with three tabs: 'Basic Information', 'Extended Information', and 'Instructor List'. The 'Basic Information' tab is currently selected. At the bottom of the window, there are three buttons: 'Display This Course', 'Another', and 'Close'.

3. Type a course ID, and click **Display This Course**. If you are unsure of the course ID, click the Course Search

helper . The following window appears:



The screenshot shows a window titled "Display Course" with a search bar and a list of course details. The search bar contains "250-B" and the results show "250-B --- Women's Literature 1900-1950". Below the search bar are three tabs: "Basic Information", "Extended Information", and "Instructor List". The "Basic Information" tab is selected, showing the following details:

Course ID:	250-B
Course name:	Women's Literature 1900-1950
Terms offered:	FALL
No. of students:	25

At the bottom of the window are three buttons: "Display This Course", "Another", and "Close".




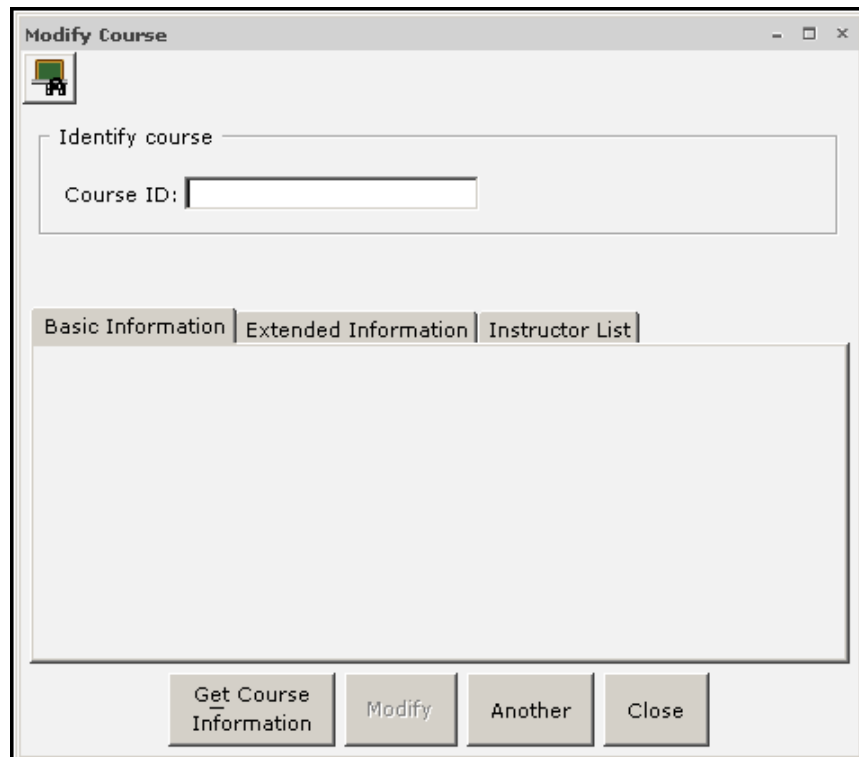
NOTE Course ID is the default search criteria. Depending on the properties set, other item lookup methods are available, including course name, instructor's user ID, and instructor name.

4. After reviewing the course information, click Close to exit this window.

Modify Course Wizard

To make changes to existing course information:

1. On the Course Information and Maintenance toolbar, click the **Modify Course** wizard .
2. If the Set Properties window appears, verify the default settings and click **OK**. The following window appears:



The screenshot shows a window titled "Modify Course" with a standard Windows-style title bar. Inside the window, there is a small icon in the top-left corner. Below the icon is a section labeled "Identify course" containing a text input field with the label "Course ID:". Below this section are three tabs: "Basic Information", "Extended Information", and "Instructor List". The "Basic Information" tab is currently selected. At the bottom of the window, there are four buttons: "Get Course Information", "Modify", "Another", and "Close".


3. Type the course ID and click **Get Course Information**. The following window appears:

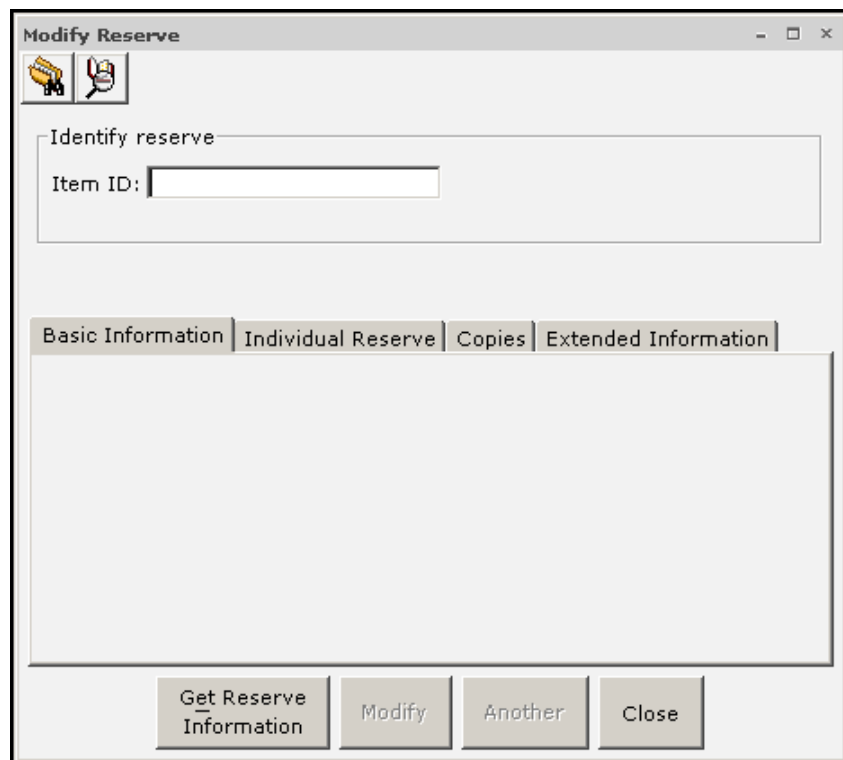
The screenshot shows a window titled "Modify Course" with a standard Windows-style title bar. Inside the window, there is a section labeled "Identify course" containing two text boxes: "Course ID:" with the value "LIT 250-A" and "Current:" with the value "LIT 250-A --- Women's Literature 1900-1950". Below this is a tabbed interface with three tabs: "Basic Information" (which is selected), "Extended Information", and "Instructor List". The "Basic Information" tab contains four fields: "Course ID:" (LIT 250-A), "Course name:" (Women's Literature 1900-1950), "Terms offered:" (a dropdown menu set to "FALL"), and "No. of students:" (25). At the bottom of the window, there is a horizontal scroll bar and four buttons: "Get Course Information", "Modify", "Another", and "Close".

5. Review and make changes as needed on all tabs, and click **Modify**.
5. Click **Close** to exit this window.

Modify Reserve Wizard

To change reserve records or individual instructor/course reserve records:

1. On the Reserve Information and Maintenance toolbar, click the **Modify Reserve** wizard .
2. If the Set Properties window appears, verify the default settings and click **OK**. The following window appears:



3. Scan the item's barcode or type the item ID and click **Get Reserve Information**. The following window appears:

Modify Reserve

Identify reserve

Item ID: 31000234571851

Basic Information | Individual Reserve | Copies | Extended Information

Homespun heroines and other women of distinction / Brown, Hallie Q. (Hallie Quinn), d. 1949.

Desk: RESERVES
Placed: 8/15/2005
Circulation rule: 2HOUR Expires(MM/DD/YYYY): 12/15/2005
Alt circ rule: Allow manual circ rule:
Copies needed: 1 Auto select copies:
Status: CURRENT Keep copies at desk:

Get Reserve Information Modify Another Close


4. Review the information and make changes on all tabs, as needed. Click **Modify**.
5. Click **Close** to exit this window.

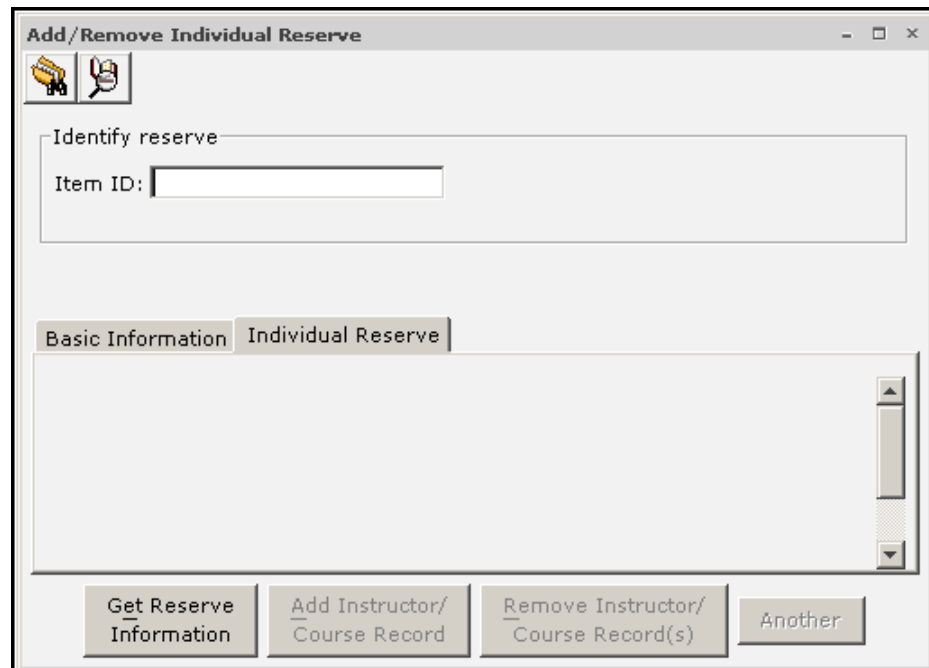
Modify Individual Instructor/Course Information

This section describes how to add additional individual instructor/course records to an item already on reserve as well as how to globally modify instructor/course information.

Individual Reserve Wizard

The **Individual Reserve** wizard creates an additional individual instructor/course reserve record for an existing reserve record. For example, an item is already on reserve for one course, such as political science. However, the item is also needed for a history course.

1. Click the **Individual Reserve** wizard .
2. If the Set Properties window appears, verify the default settings and click **OK**. The following window appears:



2. Scan the item's barcode or type the item ID and click **Get Reserve Information**. The following window appears:

Identify reserve

Item ID: 31000234571851

Basic Information Individual Reserve

Instructor	Instructor ID	Course Name	Course ID	Expires	Stage	Remove
Robertson, M...	507640100013...	Women's Lit...	LIT 250-A	12/15/2005	ACTIVE	<input type="checkbox"/>

Get Reserve Information Add Instructor/Course Record Remove Instructor/Course Record(s) Another Cancel

3. Click **Add Instructor/Course Record**. The Individual Reserve tab displays blank fields:

Add/Remove Individual Reserve

Identify reserve

Item ID:

Basic Information **Individual Reserve**

Instructor ID: Expires:

Course ID: Stage:

Get Reserve Information Add Instructor/Course Record Remove Instructor/Course Record(s) Another Cancel

4. Click the gadgets and make selections in the **Instructor ID**, **Course ID**, **Expires**, and **Stage** boxes:

Add/Remove Individual Reserve

Identify reserve

Item ID:

Basic Information **Individual Reserve**

Instructor ID: Expires:

Course ID: Stage:

Get Reserve Information Add Instructor/Course Record Remove Instructor/Course Record(s) Another Cancel

5. Click **Add Instructor/Course Record**.
6. Click **Close** to exit this window.

Global Editing

You can use the **Modify Reserve** wizard to globally edit a list of instructor/course records based on a course or instructor.

For example, when an instructor takes a sabbatical and a new instructor is assigned, you can modify all reserve information to reflect the new instructor's name and ID.

To globally edit an instructor/course:

1. On the Reserve Information and Maintenance toolbar, click the **Modify Reserve** wizard.
2. If the Set Properties window appears, verify the defaults and click **OK**.
3. Search by course or instructor. (The search helpers must be turned on in the Set Properties window for this to be available.)
4. Click the **Individual Reserve** tab.

Identify reserve

Item ID: 31000234571851

Basic Information | **Individual Reserve** | Copies | Extended Information

List of Instructors

Instructor	Instructor ID	Stage	New stage	Course name	Course ID	Expires(MM/D)
Robertson, M...	50764010001	ACTIVE		Women's Lite...	LIT 250-A	12/15/2005
Aclin, Helen J.	50764010000	ACTIVE		English 101	ENGLISH 101	12/15/2005

Get Reserve Information | Modify | Another | Close

- Click the gadget to change the Instructor ID, Course ID, or Expires Date. For this example, click the Instructor ID gadget. The following window appears:

Gadget : Browse User

Index: User ID

Search for: 50764010001428 Search...

User name	User ID	Alt ID
Washburn, Gavin	50764010001410	NONE
Boyd, Cheryl H.	50764010001428	NONE
Johnson, India	50764010001436	NONE
Shelby, Miranda S.	50764010001444	NONE
Shelby, Lauren E.	50764010001451	NONE

← →

OK Cancel

- Click **Modify** to save the changes. Notice after you click **Modify** that the display changes to update the instructor name and ID:

Modify Reserve

Identify reserve

Item ID:

Basic Information | Individual Reserve | Copies | Extended Information

List of Instructors

Instructor	Instructor ID	Stage	New stage	Course name	Course ID	Expires(MM/DD/YY)
Boyd, Cheryl H.	50764010001428	ACTIVE		Women's Liter...	LIT 250-A	12/15/2005
Aclin, Helen J.	50764010000891	ACTIVE		English 101	ENGLISH 101	12/15/2005

Get Reserve Information | **Modify** | Another | Close

7. Click **Close** to exit this window.

Taking Items Off Reserve

If an item is being taken off reserve but will be needed again in the future for a reserve, you can simply change the individual reserve record and reserve item status. Reserve records for materials needed periodically should not be removed even though the items are returned to their home location.



NOTE Reserve records for materials only needed once should be removed. Refer to the Removing Reserve Information section for more information.

To take items off reserve:

1. On the Reserve Information and Maintenance toolbar, click the **Modify Reserve** wizard.
2. If the Set Properties window appears, verify the defaults and click **OK**.
3. Scan the item's barcode or type the item ID and click **Get Reserve Information**.

4. On the Basic Information tab, and select **Dormant** from the **Status** drop-down list.

Modify Reserve

Identify reserve

Item ID: 31000234571851

Basic Information | Individual Reserve | Copies | Extended Information

Homespun heroines and other women of distinction / Brown, Hallie Q. (Hallie Quinn), d. 1949.

Desk: RESERVES

Placed: 8/15/2005

Circulation rule: 2HOUR Expires(MM/DD/YYYY): 12/15/2005

Alt circ rule: Allow manual circ rule:

Copies needed: 1 Auto select copies:

Status: DORMANT Keep copies at desk:

Get Reserve Information | Modify | Another | Close

- Click the **Individual Reserve** tab, and click the New Stage column to get a drop-down list of stages. Select **INACTIVE**.

The screenshot shows the 'Modify Reserve' application window. At the top, there are two icons: a pencil and a magnifying glass. Below them is a text field labeled 'Identify reserve' containing 'Item ID: 31000234571851'. Below this is a tabbed interface with four tabs: 'Basic Information', 'Individual Reserve', 'Copies', and 'Extended Information'. The 'Individual Reserve' tab is selected. Below the tabs is a section titled 'List of Instructors' containing a table with the following data:

Instructor	Instructor ID	Stage	New stage	Course name	Course ID	Expires(MM/
Boyd, Cher...	5076401000	ACTIVE	INACTIVE	Women's Lit...	LIT 250-A	12/15/2005
Aclin, Helen J.	5076401000	ACTIVE	INACTIVE	English 101	ENGLISH 10	12/15/2005

The 'New stage' column for the second row has a dropdown menu open, showing the following options: INACTIVE (highlighted), PREPARE, and ACTIVE. At the bottom of the window are four buttons: 'Get Reserve Information', 'Modify', 'Another', and 'Close'.

- Click the **Copies** tab, and click the New Status column to get a drop-down list of stages. Select **NOT ON RESERVE**.

Identify reserve

Item ID: 31000234571851

Basic Information | Individual Reserve | **Copies** | Extended Information

New status for all copies:

Copy	Item ID	Home Locn	Curr Locn	Reserve Status	New Status »
1	31000234571851	STACKS	RESERVES	ON RESERVE	NOT ON RESE... NOT ON RESERVE FLAGGED KEPT AT DESK PICKUP ON RESERVE

Get Reserve Information | Modify | Another | Close

- Click **Modify** to save your changes. Notice after clicking **Modify**, the Status, New Stage, and Reserve Status reflect the changes made.
- Click Close to exit the window.

Although individual instructor/course reserve records and linked items are still associated with the reserve record, they are not controlled by the reserve circulation rule. An item linked with an inactive reserve record still uses the Circulation Map policy to determine the loan period.



NOTE Items can also be taken off reserve in batch using reports. Refer to the Reports section for more information.

Removing Reserve Information

Overview

If an item is not needed at the reserve desk again, or if the associated materials have been lost or withdrawn from the library's collection, the Remove Reserve wizard permanently removes the reserve record and any linked individual instruction/course reserve records.




NOTE If the item for which you are permanently removing reserve information has more than one copy on reserve, the **Remove Reserve** wizard removes all copies from reserve at once.

If you want to remove one copy from reserve, but keep the other copies on reserve, use the **Modify Reserve** wizard to change the copy status of the item you want to take off reserve to Not On Reserve.

Remove Individual Instructor/Course Information

The **Individual Instructor/Course** wizard removes the link between the individual instructor/course reserve record and the reserve record. Complete this step before removing reserve and course information.

To remove individual instructor/course information

1. On the Reserve Information and Maintenance toolbar, click the **Individual Reserve** wizard .
2. If the Set Properties window appears, verify the defaults and click **OK**.
3. Search by the instructor's name or course ID. (The search helpers must be turned on in the Set Properties window for this to be available.)
4. Check the box under the Remove column for the instructor/course record to remove.



NOTE There must be more than one instructor/course record to remove an individual instructor/course reserve record. If not, use the **Remove Reserve** wizard to remove the entire reserve record.

Add/Remove Individual Reserve

Identify reserve

Item ID: MO1

Basic Information Individual Reserve


Instructor	Instructor ID	Course Name	Course ID	Expires	Stage	Remove
Lindstrom, Deb	DEB	History 101	HISTORY 101	NEVER	ACTIVE	<input checked="" type="checkbox"/>

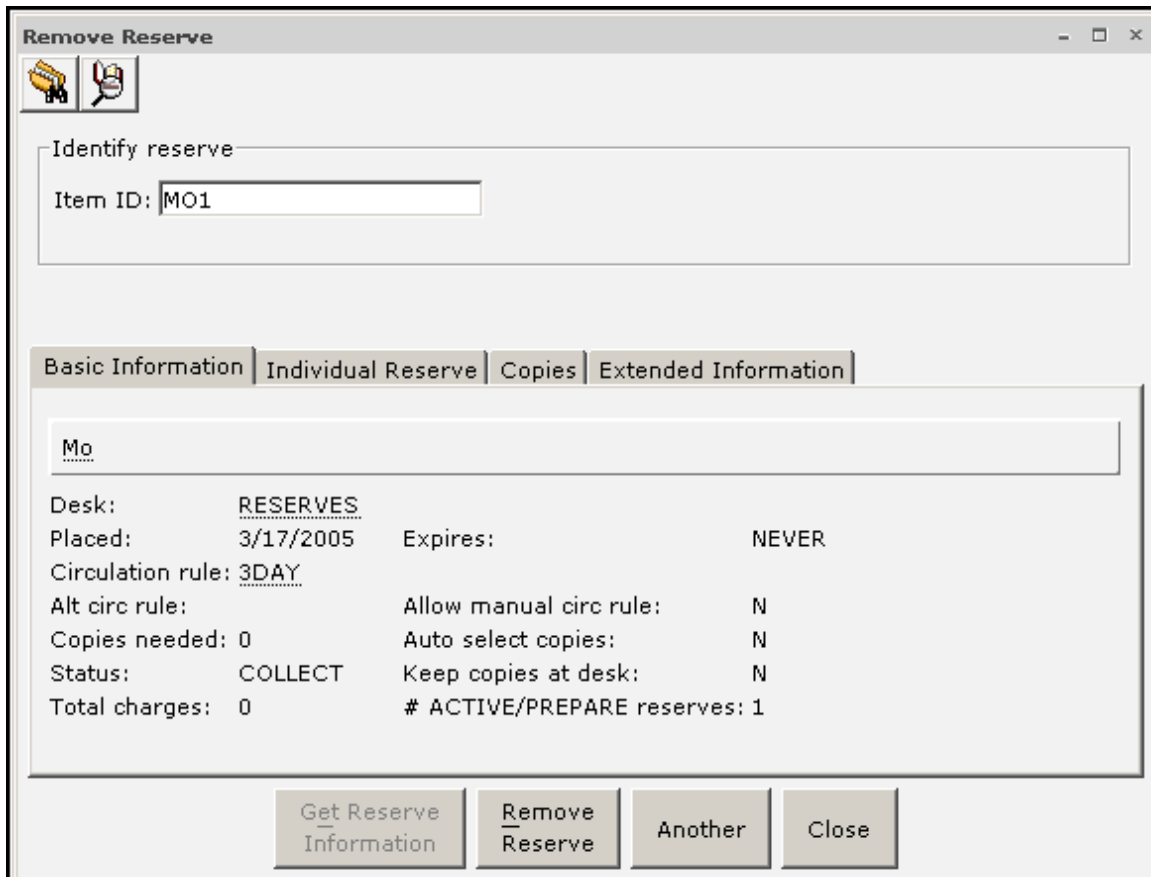
Get Reserve Information Add Instructor/Course Record Remove Instructor/Course Record(s) Another Cancel Close

5. Click **Remove Instructor/Course Record(s)**.
6. A reserve removed message appears. Click **OK**.
7. Click **Close** to exit this window.

Remove Reserve Wizard

To permanently remove reserve information:

1. On the Reserve Information and Maintenance toolbar, click the **Remove Reserve** wizard .
2. If the Set Properties window appears, verify the default settings and click **OK**.
3. Scan the item's barcode or type the item ID and click **Get Reserve Information**.



Remove Reserve

Identify reserve

Item ID: MO1

Basic Information | Individual Reserve | Copies | Extended Information

Mo

Desk: RESERVES
Placed: 3/17/2005 Expires: NEVER
Circulation rule: 3DAY
Alt circ rule: Allow manual circ rule: N
Copies needed: 0 Auto select copies: N
Status: COLLECT Keep copies at desk: N
Total charges: 0 # ACTIVE/PREPARE reserves: 1

Get Reserve Information Remove Reserve Another Close

4. Review the information on all tabs, and click **Remove Reserve** if this is the correct record.

5. A confirmation message appears. Click **Yes** to continue.
6. A completion message appears. Click **OK**.

-Or-

Click **Another** if the displayed record is not the one you want to remove.


Remove Course Wizard

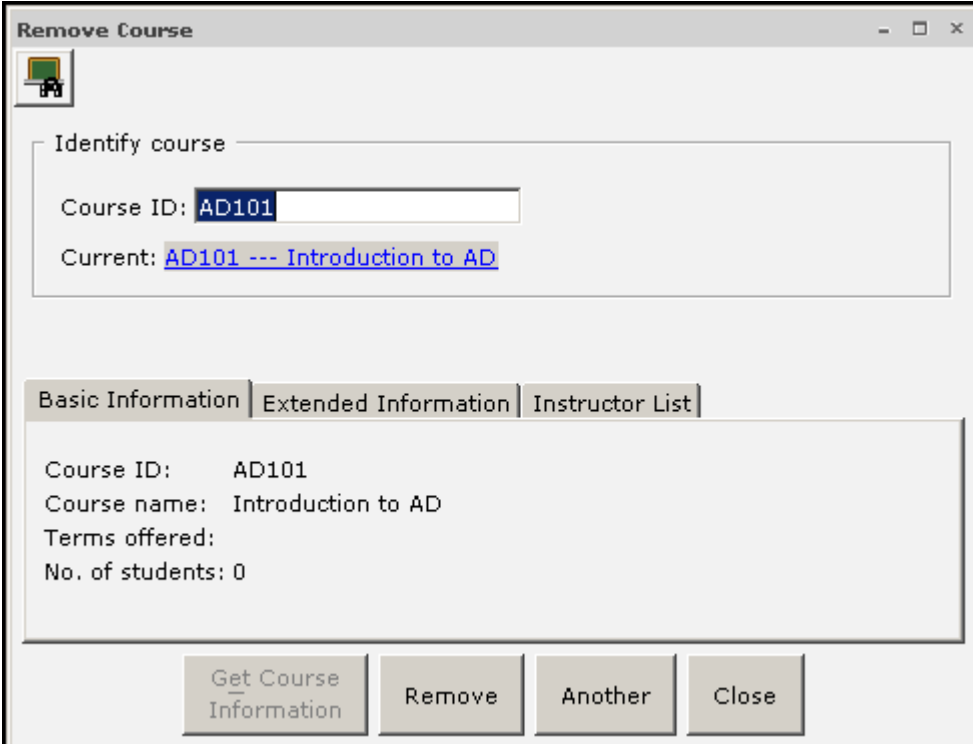
When a course no longer needs any materials at the reserve desk, and it is no longer linked to any reserve records, you can remove the course (especially if the course is not frequently taught).



NOTE Be sure to remove all reserve records from the course before you delete the course.

To remove a course:

1. On the Course Information and Maintenance toolbar, click the **Remove Course** wizard .
2. Type the course ID and click **Get Course Information**. The following window appears:



Remove Course

Identify course

Course ID:

Current: [AD101 --- Introduction to AD](#)

Basic Information | Extended Information | Instructor List

Course ID: AD101
Course name: Introduction to AD
Terms offered:
No. of students: 0

Get Course Information | Remove | Another | Close

3. Review the information on all tabs.

4. Click **Remove** if this is the correct record. A confirmation message appears. Click **Yes** to continue. A completion message appears. Click **OK**.

-Or-

Click **Another** if the displayed record is not the one you want to remove.

5. Click **Close** to exit this window.

Reserve Group Reports

Overview

Only libraries that have the Academic Reserves module use the Reserve group of reports. The reserve desk provides strict control over the circulation of library (and instructors') material that is in high demand because of reading lists for academic course work. The Reserves reports accomplish the following tasks.

- Count and list reserve records, individual courses, and reserves.
- Manage holds, recalls, overdue, and pickups for reserve materials.
- Maintain statuses such as active, inactive, and materials in preparation for reserves in batch.

To automate the reserves process, you would run a series of reports at the beginning and end of each school term. These reports find the appropriate reserve records, based on your criteria, and either put them on active reserve or make them dormant, depending on the time of year.

Report Selection Criteria

Depending on which report you run, various selection criteria pertaining to the reserves are available. This includes:

- Reserve Control Selection
- Reserve Selection
- Course Selection



NOTE Other criteria may also be available depending on the selected report. Refer to the WorkFlows Online Help for more information.

Reserve Control Selection

Schedule New Reports : Schedule Instructor Reserve Notices

Basic | User IDs | User Selection | User Status Selection

Reserve Selection | Reserve Notice

Course Selection | Reserve Control Selection

Reserve desk:

Date created:

Expiration date:

Status:

Number of reserves:

Number of active reserves:

Number of copies on reserve:

Number of copies selected:

Automatically select copies: Yes No Both

Number of copies needed:

Number of total charges:

Keep at reserve desk: Yes No Both

Allow manual circulation rule: Yes No Both

Circulation rule:

Alternate circulation rule:

Extended info:

Field	Description
Reserve Desk	All reserve records selected by the report have been assigned this specified Reserve Desk policy. These policies identify the library system's reserve areas and contain each reserve desk's alternative circulation practice and hours information. The Reserve Desk in the reserve record is the same as all reserve items associated with that reserve record. Use the Policy List gadget to select reserve desks. If no value is selected, all desks are included.
Date Created	Each reserve record selected by the report was created on this specified date. To select

Field	Description
	a range of dates, use the Date Range gadget.
Expiration Date	Each reserve record selected by the report is scheduled to expire on this specified date. This is the date that students will no longer need the title at the reserve desk, and is usually at the end of a course term. Individual reserve records can maintain a unique expiration date, but default to the expiration date of the reserve record. To select a range of dates, use the Date Range gadget.
Status	Each reserve record selected by the report currently holds this status. This field helps to track individual copies attached to the reserve record call number. A Dormant reserve record indicates that no copies are currently on reserve, but one or more have been in the past and may be again. A Collect reserve record indicates that copies need to be retrieved from the stacks to be added to the reserve desk. A Current reserve record indicates that at least one copy is currently on reserve. A Return reserve record indicates that copies are no longer required for reserve and the items may be returned to their home location.
Number of Reserves	Each reserve record selected by the report currently has this number of individual instructor/course records associated with it. To select a range of numbers, use the Number Range gadget.
Number of Active Reserves	All reserve records selected by the report currently have this number of individual instructor/course records that are active. Either Active or Prepare statuses are selected. To select a range of numbers, use the Number Range gadget.
Number of Copies on Reserve	All reserve records selected by the report have this number of associated copies with the status of On Reserve. To select a range of numbers, use the Number Range gadget.
Number of Copies Selected	Each reserve record selected by the report has this number of associated copies of a title with the status of On Reserve. To select a range of numbers, use the Number Range gadget.

Field	Description
Automatically Select Copies	If Yes, only reserve records with enabled fields of the same name will be selected. The Automatically Select Copies field in the reserve record, when enabled, permits individual copies associated with the reserve record to be automatically updated by reports that are designed to modify the status of reserve copies. Only the Reserves Pickup List, Update and Reserves Reshelving List reports will automatically select and modify the status to the new value when this field is enabled. If No, only disabled fields will be selected.
Number of Copies Needed	All reserve records selected by the report require this number of copies to be on reserve. To select a range of numbers, use the Number Range gadget.
Number of Total Charges	Each reserve record selected by the report will have this specified total number of Charge Reserve and Renew Reserve transactions on any reserve copy that belongs to this reserve record. To select a range of numbers, use the Number Range gadget.
Keep at Reserve Desk	If Yes, only reserve records with enabled fields of the same name will be selected. If this field in the reserve record is enabled, then the Reserves Reshelving List report sets the copy statuses to Kept At Desk instead of Not On Reserve or Flagged. Kept At Desk copies will not be returned to their home location. They will instead continue to be physically located at the reserve desk but will circulate as standard items. If No, only disabled fields will be selected.
Allow Manual Circulation Rule	If Yes, only reserve records with enabled fields of the same name will be selected. This field may only be enabled in the reserve records only if the Allow Alt Circ Rule attribute in the associated Reserve Desk policy is set to Yes. Enabled, this field allows any valid circulation rule to be manually entered in the Alt Circ Rule field. Disabled, an alternate circulation rule cannot be manually set when a reserve item is being charged. If No, disabled fields will be selected.

Field	Description
Circulation Rule	All reserve records selected by the report have been assigned this specified Circulation Rule policy as the primary circulation rule. The users who can circulate the materials and time period of circulation are contained in the Circulation Rule. Use the Policy List gadget to select rules. If no value is selected, all circulation rules are included.
Alternate Circulation Rule	All reserve records selected by the report have been assigned this specified Circulation Rule policy as the alternate circulation rule. This field may only be enabled in reserve records only if the Allow Alt Circ Rule attribute in the associated Reserve Desk policy is set to Yes. Unless the Allow Manual Circulation Rule attribute is also enabled, this is the only other valid circulation rule allowed for the reserve item. Use the Policy List gadget to select rules. If no value is selected, all circulation rules are included.
Extended Info	Each reserve record selected by the report has the specified text in the specified entry of its extended information. To select entries and text, use the VED List gadget.

Reserve Selection

Field	Description
Reserve Desk	All reserved items selected by this report have been assigned this specified Reserve Desk policy. These policies identify the library system's reserve areas and contain each reserve desk's alternative circulation practice and hours information. The Reserve Desk for individual reserves is the same as the associated reserve record. Use the Policy List gadget to select reserve desks. If no value is selected, all desks are included. This field may not be available for all reports.
Date Placed	Each reserve selected by the report was placed on this specified date. This field represents the date the individual instructor/course record was created (for example, added to an existing reserve record), but does not represent the date that the copy went on reserve. To select a range of dates, use the Date Range gadget.

Stage Each reserve selected by the report is currently in this stage or status. This field generally determines the relationship of the instructor and course to any copies of the linked call number. An Inactive reserve may be only reserved during another term, a Prepare reserve is not yet available at the reserve desk, and an Active reserve is currently available and the instructor and course can be retrieved in a browsed search.

Expiration Date Each reserve selected by the report is scheduled to expire or be released from the reserve desk on this specified date. This is the date that students will no longer need the title at the reserve desk, and is usually at the end of a course term. If this date is not supplied, SirsiDynix Symphony 3.2 defaults to the reserve record's expiration date. To select a range of dates, use the Date Range gadget.



NOTE Reports that include a reserve selection may or may not include all of the preceding selections.

Course Selection

The screenshot shows a software window titled "Schedule New Reports : Schedule Instructor Reserve Notices". It has a tabbed interface with the following tabs: "Basic", "User IDs", "User Selection", "User Status Selection", "Reserve Selection", "Reserve Notice", "Course Selection", and "Reserve Control Selection". The "Course Selection" tab is currently selected. Below the tabs, there are four input fields, each with a VED List gadget icon to its right:

- Extended info: [input field]
- Number of reserves: [input field]
- Number of students: [input field]
- Terms offered: [input field]

At the bottom of the window, there are four buttons: "Schedule", "Run Now", "Save As Template", and "Cancel".

Field	Description
Extended Info	Each course selected by the report has the specified text in the specified entry of its extended information. To select entries and text, use the VED List gadget.
Number of Reserves	All courses selected by the report currently have this number of items on reserve. To select a range of numbers, use the Number Range gadget.
Number of Students	All courses selected by the report can accommodate enrollment of this specified number of students. To select a range of numbers, use the Number Range gadget.
Terms Offered	All courses selected by the report are offered during this specified term or terms. These policies identify the library system's semesters or quarters and are linked to course records. Use the Policy List gadget to select terms. If no value is selected, all terms are included.

Taking Items Off Reserve in Batch

In order for this process to work the reports must be run in the following order:

- Set Reserves to Inactive Report
- Reserves Reshelving List Report

Set Reserves to Inactive Report

At a specified time before each term, this batch report selects active individual instructor/course/reserve records for courses taught during the previous term that are not taught in the upcoming term. For example, if the upcoming term is fall, then this report selects courses taught in terms other than fall and changes the reserve status to Inactive. The Stage field of the individual reserve record is changed from Active to Inactive. This report then produces a list of all individual instructor/course/reserve records whose status changed. This report also triggers a change to the reserve record status.



NOTE If any individual instructor/course/reserve record is changed to Inactive, and if any items are set to On Reserve, then the status of the associated reserve record is changed to Return; if no items are set to On Reserve, the reserve record status is changed to Dormant.

Reserves Reshelving List Report

The Reserves Reshelving List report can be used when pulling items from the reserve desk shelves and routing them to another location. This report produces a list of items to be released from reserve. Depending on the values in the reserve record's Auto Select Copies field and Keep Copies at Desk field, each item's reserve copy status is changed to Not On Reserve, Kept At Desk, or Flagged. Only reserve records whose Status field is set to Return are considered.

Put Items On Reserve in Batch

In order for this process to work the reports must be run in the following order:

- List Reserve Control Records Report
- Instructor Reserve Notices Report
- Set Reserves to Prepare Report
- Reserves Pickup List, Update Report
- Set Reserves to Active Report

List Reserve Control Records Report

This report produces a list of reserve records. Records may be sorted by title/author or call number.

Instructor Reserve Notices Report

This report produces notices that can be sent to instructors listing all reserve items for a particular instructor or selected courses or reserve items that the instructor assigns that are being managed at the reserves desk. A specific instructor or list of instructors may be selected by user ID, or items included in the notice may be based on various user, course, or reserve characteristics.



NOTE It is not necessary to run the two preceding reports at the beginning of a term, but it can be helpful. The List Reserve Control Records report will allow you to output a concise list of records currently set to Dormant. The Instructor Reserve Notices report is helpful in allowing the professors to review those reserve records associated with their classes and determine if there is indeed a need to maintain the reserve controls for those items. This can be a useful clean up tool as well.

Set Reserves to Prepare Report

At a specified time prior to each term, this batch report selects inactive individual instructor/course reserve records for courses that will be taught in the upcoming term. For example, if the upcoming term is fall, then this report selects courses that will be taught during the fall term and changes the individual instructor/course reserve records' status to Prepare. The status of each inactive reserve record is changed from Inactive to Prepare. This report then produces a list of all individual instructor/course/reserve records whose status changed.



NOTE If any individual instructor/course/reserve record is changed from Inactive to Prepare, then the status of the associated reserve record is changed from Dormant or Return to Collect.

Reserves Pickup List, Update Report

The Reserves Pickup List, Update report changes items and reserve records in batch, places holds, and produces list reports. Only reserve records whose status is set to Collect are considered. Based on information in each needed item's reserve record, SirsiDynix Symphony 3.2 can change the reserve copy status from Flagged and Not On Reserve to Pickup.

This report must determine which copies of the qualifying reserve records to set to Pickup. Items that have been set to Flagged prior to running this report are chosen first. Following this step, the report may automatically select copies to set to Pickup if the Auto Select Copies field has been set to Yes. Additionally, any items set to Kept At Desk are changed to On Reserve if they are not charged. A list of all items changed to Pickup is produced to allow the copies to be retrieved.

A separate shortfall report that displays in the finished list with the name Reserves PSHRT is also produced for all reserve records for which the number of items specified by the Copies Needed field could not be automatically selected. If a needed item is owned by the library but not available, a hold or recall hold is placed. A list is produced for:

- Available holds made unavailable for which availability notices have not been sent.
- Available holds made unavailable for which availability notices have been sent.


Set Reserves to Active Report

At a specified time prior to each term, this batch report selects individual instructor/course/reserve records that will be taught during the upcoming term. The Stage field of the individual reserve record is changed from Prepare to Active. A reserve record whose status changed, and all items associated with active individual instructor/course reserve records are posted to the SirsiDynix Symphony 3.2 Public Access browse reserve list.

Receive Reserve Materials

Use the **Receive Reserve** wizard to receive a copy with a status of Pickup for the reserve desk. This wizard changes the reserve copy status to On Reserve and changed the current location to that of the reserve desk.

To receive reserve material:

1. On the Common Tasks toolbar, click the **Receive Reserve** wizard .
2. Scan the item barcode or type the item ID and click **Get Reserve Information**.
6. Review the displayed information and click **Receive Reserve**.

Modify Reserve

Identify reserve

Item ID: 31000234571851

Status Alert!

Basic Information | Individual Reserve | Copies | Extended Information

Homespun heroines and other women of distinction / Brown, Hallie Q. (Hallie Quinn), d. 1949.

Desk: RESERVES
 Placed: 8/15/2005
 Circulation rule: 2HOUR Expires(MM/DD/YYYY): 12/15/2005
 Alt circ rule: Allow manual circ rule:
 Copies needed: 1 Auto select copies:
 Status: CURRENT Keep copies at desk:

Get Reserve Information | Modify | Another | Close

7. Click Close to exit this window.

Additional Reports

The following reports may also provide additional help during day-to-day operations depending on the library's procedures.

List Individual Reserves Report

This report produces a list of reserves that may be output several ways. Reserves can be listed by item, instructor, course, or title. Instructor and course information is included regardless of the output method. Records may be sorted by title/author, call number, course ID, or instructor. However, it is important when selecting the sort options that the groupings in the output options are also considered.

List Reserve Desk Holds

This report produces a list of items held for a specific reserve desk. The Reserve Desk selection is required. These items can then be selected based on hold characteristics. By default, only Active holds are selected. The lists can be sorted by title/author or call number. The List Reserve Desk Holds report may be used to produce a list of available holds that can be used to retrieve items from the holds shelf and place them on reserve with the Receive Reserve wizard. Alternately, a list of unavailable, recalled holds could be used to determine which needed items should be borrowed.

Recall for Reserve Notices Report

This report produces recall notices for items needed for the reserve desk. This report first selects charged items with a reserve copy status of Pickup, and then sends a recall notice to the user who currently has the copy checked out. Selection for this report can be based on charge records, item records, and user records. Sort the output by user ID, user name, or zip code.

Reserves Overdue Notices Report

This report produces overdue notices for items charged from the reserve desk. The only reserve record selections available are Reserve Desk and Number of Active Reserves. Sort the output by user ID, user name, or zip code.

Reserves Pickup List Report

This report produces a list of items that need to be picked up and placed on reserve (for example, whose item status is set to Pickup). Listed items are sorted by location, and then call number.

Reserve Usage By Call Number Report

This report determines how often reserved items were used during a specified time period. Selecting Yes on the Compare Database tab includes titles that have not been checked out as well as titles that have been checked out for comparison of usage. This report uses the transaction log to determine the number of times the Checkout or Renew Reserve wizards were used during a specified time period, and then accrues this count based on call number and reserve desk.

The output of the report includes a list of each instructor, the call numbers that each instructor has on reserve at each reserve desk, and the count of Checkout and Renew Reserve transactions that have occurred on a specified call number at each reserve desk. Instructors may be selected based on characteristics of the user record of the reserved titles' instructor. The output list can be sorted based on instructor ID/call number, instructor name/call number, instructor name/title, instructor name/usage, and reserve desk/call number.

Set Reserves to Select Status Report

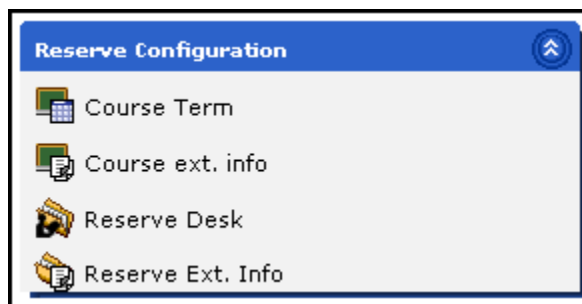
This report is similar to the Set Reserves to Active, Set Reserves to Prepare, and Set Reserves to Inactive reports, except that the status of the records, after the Set Reserves to Select Status report has run, can be specified as well as allowing any individual instructor/course reserve status to be changed regardless of the current status. The new record status value is required by this report. This report is primarily used to correct problems or mistakes.





Reserves Policies

Overview

Reserves policies let you define periods when courses may require reserved items as well as information about the location and circulation of these reserved items.

Reserve Configuration Toolbar

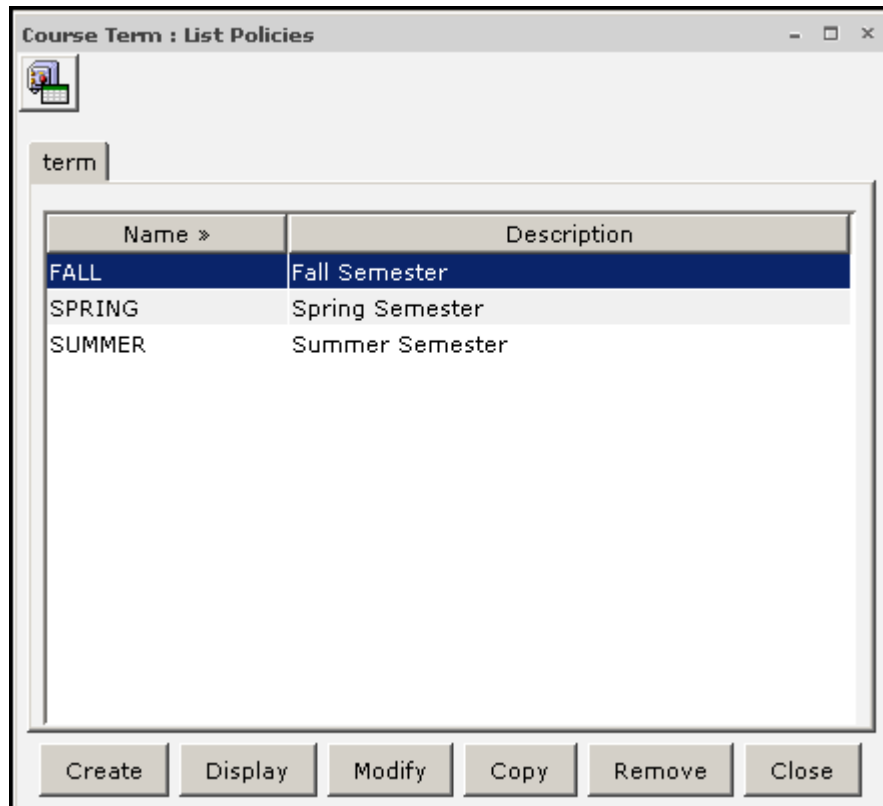


Wizard	Description
	Course Term –Use this wizard to create, display, modify, copy, or remove the Course Term policies. Click Close to quit the wizard.
	Course Extended Info – Use this wizard to modify the format of the fields that display on the Extended Info tabs on the Create Course and Duplicate Course wizards.
	Reserve Desk – Use this wizard to create, display, modify, copy, or remove the Reserve Desk policies.
	Reserve Extended Info – Use this wizard to modify the format of the fields that display on the Extended Info tab on the Modify Reserve wizard.

Course Term Policy

A Course Term policy identifies the library system's semesters or quarters and is linked to course records. The Terms Offered field in a course record references the Course Term policies. The Course Term policies are useful when determining when a course will be taught and when reserve items will be needed for circulation.

From the List Policies window, you can create, display, modify, copy, or remove the Course Term policies. Click **Close** to exit.



Attributes

The Course Term policy includes the Name and Description attributes.

Field	Description
Name	This attribute provides an abbreviated course term name that is used to link reserve records and course records.
Description	This attribute provides more information about the policy and its use by the library.

Course Term

Name: FALL

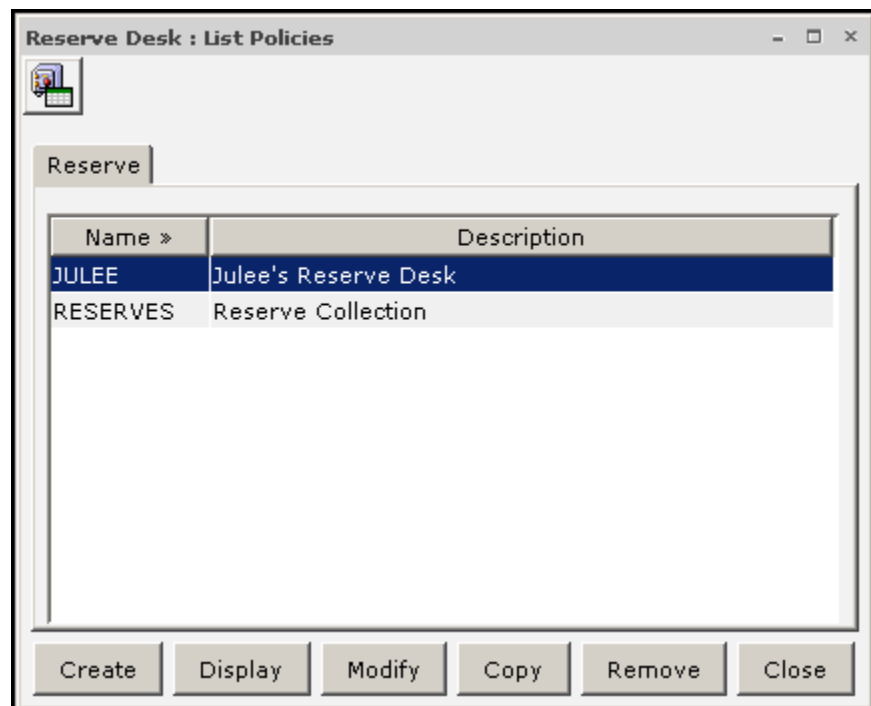
Description:

Save Cancel

Reserve Desk Policy

The Reserve Desk policy defines the location of reserve items as well as explains how to circulate the reserve items. Reserve Desk policy names are used as values in the Desk field in reserve records.

From the List Policies window, you can create, display, modify, copy, or remove the Reserve Desk policies. Click **Close** to exit.



Attributes

The Reserve Desk policy contains several attributes that define characteristics of the reserve collection associated with this policy. The attributes also provide circulation and location information for items at the reserve desk.

Field	Description
Name	This attribute uniquely identifies a Reserve Desk policy.
Description	This attribute provides more information about the policy and its use by the library.
User ID	This attribute contains the reserve desk's user ID; a user record must be created with this ID. It is recommended that this attribute's value match the Reserve Desk policy name. Use the


Field	Description
	Browse User gadget to select a user ID.
Location	<p>This attribute allows the location of a reserve copy to be specified when it has been placed on reserve. This value must match a Location policy. When a copy is placed on reserve, a Location policy must exist for the reserve desk associated with that copy.</p> <p>Example</p> <p>Items located at the Main Library reserve desk must be associated with the MAIN-RESV Location policy.</p> <p>A Location Policy Type, RESERVE, must be assigned to all reserve user locations. This Location policy attribute allows copies at the owning library to be charged to a reserve desk at another library.</p>
Library	This attribute allows the name of the reserve desk's library to be specified. This value must match a Library policy.
Overdue Block	This attribute determines whether a user with overdue reserve charges should be blocked from charging additional reserve items from this reserve collection.
Allow (Alternate Rules)	This attribute allows an alternate circulation rule to be used. If selected, an alternate circulation rule may be used when a copy is charged or renewed from the reserve collection within a set time of the reserve desk closing time.
Automatically Applied (Alternate Rules)	<p>This attribute specifies whether SirsiDynix Symphony 3.2 should automatically apply the alternate circulation rule or not. If selected, SirsiDynix Symphony 3.2 will automatically apply the alternate circulation rule from the item's reserve record whenever an item is charged or renewed from the reserve collection within a set time of the reserve desk closing time and a manual circulation rule is not supplied.</p> <p>If the Auto Alt Circ Rule is disabled, an alternate circulation rule can be manually defined when the reserved item is charged if the reserve record allows a manually defined alternate circulation rule.</p>


Field	Description
Not Allowed Until [] Minutes Before Closing	This attribute specifies the number of minutes before the reserve desk closes that the alternate circulation rule may be applied. Alternate circulation rules are defined in reserve records.
Desk Hours	This attribute lists the standard operating hours that the reserve desk is open. Use the Fixed Time gadget to select the standard operating hours. Time entered is displayed in 24-hour format, or military time.


Reserve Desk

Name:

Description:

User ID: 

Location: 

Library: 


Overdue block

Alternate Rules

Allow

Automatically applied

Not allowed until minutes before closing

Desk hours: 

Extended Info Format Policy

Extended Information Format policy controls the display, editing, and data validation of all extended information fields in every type of record used in SirsiDynix Symphony 3.2. A Format policy is a list of entries used by a given type of record, along with the characteristics of each entry.

All formats in SirsiDynix Symphony 3.2 have been grouped according to their general purpose or use. By assigning a particular purpose to a format, SirsiDynix Symphony 3.2 prompts the user only with appropriate format choices at any place in the system when a Format policy is requested. Extended information-purpose formats all have the same set of attributes.

The following Extended Information Format policies are delivered for the Reserves module.

- COURSEX (Course Extended Information)
- RESCTLX (Reserves Extended Information)

Course ext. info

Basic Entries

Entry ID Synonym List

Full entries: COURSE-F

Brief entries: COURSE-BR

Template entries: COURSE-F

Entry ID	Description
NOTE	Note
COMMENT	Comment

Save Create Display Modify Remove Close

Appendix A – Follow-up Activities

Overview

Follow the instructions for each activity. Try to complete each activity before looking at the solution for the answer.

Activities

Activity 1

Professor Xyz has just joined the faculty and will be teaching a new physical education course called Snow Skiing (PE305) in the spring semester. She has asked you to put her personal copy of “Snow Skiing for Dummies” on reserve. Create the instructor, course, brief title, and reserve records for this.

Activity 2

Professor Xyz is also teaching a Winter Sports (PE250) class in the spring. She has assigned some reading from her copy of “Snow Skiing for Dummies” and would like for you to put it on reserve for this class as well. Create the course and reserve records for this. (Hint: you’ll need to add an individual instructor/course reserve record to the existing reserve record.)

Activity 3

Professor Lmnop is teaching Rap Music Appreciation (MU180) in the spring. He has two books that he would like put on reserve: “The History of Weird Band Names” and “The Rap/English translation dictionary.” Create the instructor, course, brief titles, and reserve records for this.

Activity 4

Professor Lmnop is also teaching Classical Music Appreciation (MU190) in the spring. He has one CD that he would like to put on reserve: “Beethoven’s Greatest Hits.” Create the course, brief title, and reserve records for this.

Activity 5

Professor Lmnop is taking an extended leave and Professor Xyz will be taking over all his classes. Modify the reserve records for this. (Hint: use the modify wizard and search by instructor name.)

Activity 6

Professor Xyz has decided she does not need “The History of Weird Band Names” on reserve for MU180 for the spring, but it may be needed on reserve at a later date. Modify the reserve record for this.

Solutions

Activity 1

Create the instructor record

1. Click the **New User Registration** wizard.
2. Select the profile name (e.g., Faculty).
3. Scan the user's barcode or type the User ID.
4. Click **OK**.
5. On the Basic Information tab, complete the **Last name, first** (Amy Xyz), the **Title** (Prof), and any other fields as needed.
6. On the Demographics tab, complete any fields as needed.
7. On the Addresses tab, complete the address information based on your library's practice.
8. Click **Register User**.

Create the course record

1. Click the **Create Course** wizard.
2. Type a course ID (PE305) and click **Create Course**.
3. On the Basic Information tab, complete the **Course name** (Snow Skiing), the **Terms offered** (Spring) and the **No. of students** boxes.
4. Click **Modify** to save the course information.
5. Click **Close**.

Create the brief title record for the instructor's personal copy

1. Click the **Add Brief Title** wizard.
2. On the Set Properties window, provide the following information:
 - Select **Template** for the **Use entries**.
 - Verify that the **Shadow title** option is not checked.
 - Verify that the **Permanent** option is not checked.
 - Set the **Home Location** to **Reserves**.
 - Verify the remaining defaults and click **OK**.
3. Complete the title ("Snow Skiing for Dummies") in the **Title (245)** box.
4. In the **General Note (500)** box, type **Instructor's copy**.
5. Complete the remaining fields as needed.
6. Complete the Call number and copy fields as needed.
7. Click **Add Brief Title** and close the window.

Create the reserve record

1. Click the **Create Reserve** wizard.
2. Scan the item's barcode or type the item ID for "Snow Skiing for Dummies" and click **Get Reserve Information**.
3. On the Basic Information tab, provide the following information:
 - Select a **Circulation rule** from the drop-down list.
 - Type an expiration date or use the gadget for the **Expires** box.
 - Select an **Alt. circ. rule**, if needed.
 - Select **Allow manual circ rule**, if needed.
 - Complete **Copies needed**, if applicable.
 - Select **Auto select copies**, if needed.
 - Select **Current** for the **Status**.
 - Select **Keep copies at desk**, if needed.
4. Click the **Individual Reserve** tab and provide the following information:
 - Complete the **Instructor ID** or use the gadget to identify the instructor (Prof. Xyz).
 - Select **Active** for the **Stage**.
 - Complete the **Course ID** or use the gadget to identify the course (PE305).
 - Type an expiration date or use the gadget for the **Expires** box.
5. Click the **Copies** tab and select **On Reserve** for the **New Status**.
6. Click **Create**.

Activity 2

Create the course record

1. Click the **Create Course** wizard.
2. Type a course ID (PE250) and click **Create Course**.
3. On the Basic Information tab, complete the **Course name** (Winter Sports), the **Terms offered** (Spring) and the **No. of students** boxes.
4. Click **Modify** to save the course information.
5. Click **Close**.

Add the individual instructor/course information

1. Click the **Individual Reserve** wizard.
2. Scan the item's barcode or type the item ID and click **Get Reserve Information**.
3. Click **Add Instructor/Course Record**.
4. On the Individual Reserve tab, provide the following information:
 - Complete the **Instructor ID** or use the gadget to identify the instructor (Prof. Xyz).
 - Select **Active** for the **Stage**.
 - Complete the **Course ID** or use the gadget to identify the course (PE250).
 - Type an expiration date or use the gadget for the **Expires** box.
5. Click **Add Instructor/Course Record**.

Activity 3

Create the instructor record

1. Click the **New User Registration** wizard.
2. Select the profile name (e.g., Faculty).
3. Scan the user's barcode or type the User ID.
4. Click **OK**.
5. On the Basic Information tab, complete the **Last name, first** (Sam Lmnop), the **Title** (Prof), and any other fields as needed.
6. On the Demographics tab, complete any fields as needed.
7. On the Addresses tab, complete the address information based on your library's practice.
8. Click **Register User**.
9. Click **Close**.

Create the course record

1. Click the **Create Course** wizard.
2. Type a course ID (MU180) and click **Create Course**.
3. On the Basic Information tab, complete the **Course name** (Rap Music Appreciation), the **Terms offered** (Spring) and the **No. of students** boxes.
7. Click **Modify** to save the course information.
8. Click **Close**.

Create the brief title record for the instructor's personal copy

1. Click the **Add Brief Title** wizard.
2. On the Set Properties window, provide the following information:
 - Select **Template** for the **Use entry**.
 - Verify that the **Shadow title** option is not checked.
 - Verify that the **Permanent** option is not checked.
 - Set the **Home Location** to **Reserves**.
 - Verify the remaining defaults and click **OK**.

3. Complete the title (“The History of Weird Band Names”) in the **Title (245)** box.
4. In the **General Note (500)** box, type **Instructor’s copy**.
5. Complete the remaining fields as needed.
6. Complete the Call number and copy fields as needed.
7. Click **Add Brief Title**.
8. Click **Add Another Title**.
9. Repeat steps 3-7 for the second book, “The Rap/English Translation Dictionary.”
10. Click **Close**.

Create the reserve record

1. Click the **Create Reserve** wizard.
2. Scan the item’s barcode or type the item ID for “The History of Weird Band Names” and click **Get Reserve Information**.
3. On the Basic Information tab, provide the following information:
 - Select a **Circulation rule** from the drop-down list.
 - Type an expiration date or use the gadget for the **Expires** box.
 - Select an **Alt. circ. rule**, if needed.
 - Select **Allow manual circ rule**, if needed.
 - Complete **Copies needed**, if applicable.
 - Select **Auto select copies**, if needed.
 - Select **Current** for the **Status**.
 - Select **Keep copies at desk**, if needed.
4. Click the **Individual Reserve** tab and provide the following information:
 - Complete the **Instructor ID** or use the gadget to identify the instructor (Prof. Lmnop).
 - Select **Active** for the **Stage**.
 - Complete the **Course ID** or use the gadget to identify the course (MU180).
 - Type an expiration date or use the gadget for the **Expires** box.
5. Click the **Copies** tab and select **On Reserve** for the new status.

6. Click **Create**.
7. Click **Another**.
8. Repeat steps 2-6 for the second book, “The Rap/English Translation Dictionary.”
9. Click **Close**.

Activity 4

Create the course record

1. Click the **Create Course** wizard.
2. Type a course ID (MU190) and click **Create Course**.
3. On the Basic Information tab, complete the **Course name** (Classical Music Appreciation), the **Terms offered** (Spring) and the **No. of students** boxes.
4. Click **Modify** to save the course information.
5. Click **Close**.

Create the brief title record for the instructor's personal copy

1. Click the **Add Brief Title** wizard.
2. On the Set Properties window, provide the following information:
 - Select **Template** for the **Use entry**.
 - Verify that the **Shadow title** option is not checked.
 - Verify that the **Permanent** option is not checked.
 - Set the **Home Location** to **Reserves**.
 - Verify the remaining defaults and click **OK**.
3. Complete the title ("Beethoven's Greatest Hits") in the **Title (245)** box.
4. In the **General Note (500)** box, type **Instructor's copy**.
5. Select **CD** for the **Item type**.
6. Complete the remaining fields as needed.
7. Click **Add Brief Title** and close the window.

Create the reserve record

1. Click the **Create Reserve** wizard.
2. Scan the item's barcode or type the item ID for "Beethoven's Greatest Hits" and click **Get Reserve Information**.
3. On the Basic Information tab, provide the following information:
 - Select a **Circulation rule** from the drop-down list.

- Type an expiration date or use the gadget for the **Expires** box.
 - Select an **Alt. circ. rule**, if needed.
 - Select **Allow manual circ rule**, if needed.
 - Complete **Copies needed**, if applicable.
 - Select **Auto select copies**, if needed.
 - Select **Current** for the **Status**.
 - Select **Keep copies at desk**, if needed.
4. Click the **Individual Reserve** tab and provide the following information:
 - Complete the **Instructor ID** or use the gadget to identify the instructor (Prof. Lmnop).
 - Select **Active** for the **Stage**.
 - Complete the **Course ID** or use the gadget to identify the course (MU190).
 - Type an expiration date or use the gadget for the **Expires** box.
 5. Click the **Copies** tab and select **On Reserve** for the new status.
 6. Click **Create**.
 7. Click **Close**.

Activity 5

Modify the reserve record

1. Click the **Modify Reserve** wizard.
2. Search by the instructor's ID or name for Prof. Lmnop.
3. Use the gadget to change the **Instructor ID** for Prof. Xyz under Global Edit Field Values.
4. Click **Modify** to save the changes.
5. Click **Close**.

Activity 6

Modify the reserve record

1. Click the **Modify Reserve** wizard.
2. Scan the item ID or type the item ID for “The History of Weird Band Names” and click **Get Reserve Information**.
3. On the Basic Information tab, select **Dormant** for the **Status**.
4. Click the **Individual Reserve** tab.
5. Select **Inactive** for the **Stage**.
6. Click the **Copies** tab.
7. Select **Not on Reserve** for the **New Status**.
8. Click **Modify** to save the changes.

Appendix B – Terms to Know

Terms to Know

This section provides definitions for commonly used terms used in Academic Reserves

Course Record

Course records define the courses for which reserve materials are needed. SirsiDynix Symphony 3.2 links the course records with the individual instructor/course reserve records and through them to materials on reserve. These links associate a course record with a specific title on reserve and a specific instructor.

Electronic Reserves

An electronic resource, such as an Internet address or an electronic text file, can be associated with a record when an 856 (Electronic Access) entry is added to a catalog record or MARC holding record.

Individual Instructor/Course Reserve Record

Each individual instructor/course reserve record must belong to a reserve record that links this individual instructor/course reserve record to the call number record. The instructor's user ID links the individual instructor/course reserve record to the instructor's user record. The course ID links the individual instructor/course reserve record to the course record.

The individual instructor/course reserve record provides information about the instructor who requested the material for reserve as well as about the course for which the reserve material is needed. Each individual instructor/course record contains information applicable only to one specific instructor/course. Each record can also contain information about the current status of the record and how long the instructor and/or course will need the material.

Individual Instructor/Course Reserve Record Status

The individual reserve record Stage field reflects how soon the copies will be posted to the reserve browse index, and consequently, how soon students will be able to check out these copies. This field may contain the following values.

Status	Description
Active	Library staff has gathered the materials associated with individual instructor/course records that have this status. These records are posted to the reserve browse index, and public users can search and view copies by Course ID, Course Name, and/or Instructor Name.
Inactive	The title does not currently need to be on reserve for the specified course and instructor.
Prepare	Library staff should be in the process of gathering materials associated with individual instructor/course records that have this status, since they will be needed soon. However, these materials are not yet ready for circulation. Usually, reserves are given this status just before a new term begins.

Instructor Record

Both the reserve records and individual instructor/course records are linked with user records. A user record must exist for the Reserve Desk, instructor, and patron.

Before an instructor can have a copy placed on reserve and be associated with an individual instructor/course reserve, the instructor must have a user record.

Reserve Record

Before placing materials on reserve, the call number record of the item to be reserved must be linked with a reserve desk. Each reserve collection at a library must have a reserve desk policy entry. The reserve record points to this reserve desk policy information, as well as Circulation Rule policy information. Either a reserve record must be created, or this copy must be linked to an existing reserve record.

The reserve record is then able to represent and track linked individual instructor/course reserve records. The reserve record can represent none, one, or several individual instructor/course reserve records.

Reserve Record Status

By using the call number to associate the reserve record with the physical materials, the reserve record Status field reflects what is happening to the materials being placed on reserve or being removed from reserve. This field may contain the following values, which allow the reserve record to track the linked individual instructor/course reserve records.

Status	Description
Dormant	No materials associated with this reserve record are currently on reserve, though these materials may have been on reserve in the past.
Collect	Individual instructor/course reserve records require the materials associated with this reserve record. Materials need to be collected from their home location and placed at the library's reserve desk.
Current	At least one copy linked to this record is available for circulation as a reserve copy from the reserve desk.
Return	No individual instructor/course reserve records currently require the materials linked to this reserve record. The physical materials can be returned to their home location or routed in response to a hold request.

Reserve Copy Status

The reserve copy Status field reflects what is happening to each copy being placed on or being removed from reserve. This field may contain the following values.

Status	Description
Flagged	The specified copy will be brought to the reserve desk in the future. This “tags” the item, but does not affect its normal circulation. However, items with this status may not be “tagged” for another reserve record.
Kept at Desk	Although this copy retains its reserve desk location and is physically shelved at the reserve desk, the copy is circulated to any user as non-reserve material. Usually, copies with this status are copies that are needed at the reserve desk often, such as three terms out of four.
Not on Reserve	The specified copy is not linked in any manner with a reserve desk.
On Reserve	The specified copy is currently at the reserve desk and available for students to check out. This copy is on reserve for at least one individual instructor/course record.
Pickup	This copy should be brought to the reserve desk immediately if it is available in the library. SirsiDynix Symphony 3.2 automatically places a copy hold to prevent this item from circulating before it is retrieved for the reserve desk. A hold for this item will be placed first in the hold queue list, and any currently available holds on this item will become unavailable. If the item is checked out, the hold placed will be a recall hold.



NOTE When a copy has a Kept at Desk status and is circulated as non-reserve material, SirsiDynix Symphony 3.2 refers to the Circulation Map policy for information about how to circulate this copy. For more information about the Circulation Map policy, refer to the WorkFlows online help.

For more information about reserve statuses and stages, please refer to the Helps topic “About Reserve Status and Stage Relationships.”

Shadow Catalog

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

Index

B	
Borrowing	
from a non-Symphony library	53
from a Symphony library	51
C	
Charging reserved material	41
Checking in materials	44
Course record	
create	20
duplicate	23
Course reserve record status	33, 120
Course term policy	100
Create Course wizard	20
Create Reserve wizard	28
D	
Definitions	119
Display	
course information	58
reserve information	35
course ID search	37
course name search	37
instructor search	37
item search	35
reserve information in iLink/iBistro	38
Duplicate course information	23
Duplicate Course wizard	23
E	
Electronic reserves	49
Extended info format policy	105
G	
Global editing	68
I	
iBistro	38
lookup items on reserve	
course name	39
course number	39
instructor	39
iLink	38
Individual instructor/course information	
modify	64
remove	76
Individual Reserve wizard	64
Instructor copy	46
Instructor record	
create	11
Instructor Reserve Notices report	93
L	
List Individual Reserves report	97
List Reserve Control Records report	93
List Reserve Desk Holds report	97
M	
Modify	
individual instructor/course information	64
Modify Course wizard	60
Modify Reserve wizard	62
P	
Patron status	15
Policy	
course term	100
extended info format	105
reserve desk	102
R	
Recall for Reserve Notices report	97
Receive Reserve wizard	96
Record structure	2
Remove	
individual instructor/course information	76
Remove Course wizard	80
Remove reserve	71
Remove Reserve wizard	78
Renewing reserved materials	43
Reports	83
course selection	91
Instructor Reserve Notices	93
List Individual Reserves	97
List Reserve Control Records	93
List Reserve Desk Holds	97
put items on reserve in batch	93
Recall for Reserve Notices	97
reserve control selection	85
reserve selection	89
Reserve Usage by Call Number	98
Reserves Overdue Notices	97
Reserves Pickup List	98
Reserves Pickup List, Update	95
reserves reshelving list	92
selection criteria	84
Set Reserves to Active	95
Set Reserves to Inactive	92
Set Reserves to Prepare	94
Set Reserves to Select	98

Reserve
 display35
 Reserve copy status33, 122
 Reserve desk policy102
 Reserve record
 create28
 Reserve record status33, 121
 Reserve status relationships33
 Reserve Usage by Call Number report98
 Reserves Overdue Notices report97
 Reserves Pickup List report98
 Reserves Pickup List, Update report95
 Reserves reshelving list report92

S

Session Settings Wizard9
 Set Reserves to Active report95
 Set Reserves to Inactive report92
 Set Reserves to Prepare report94
 Set Reserves to Select Status Report98
 Shadow Catalog
 definition123
 Status
 course reserve33, 120
 reserve control121
 reserve copy33, 122
 reserve record33

T

Taking items off reserve in batch 92
 Toolbars
 Common Tasks 4
 course information and maintenance 6
 item information and maintenance 8
 Reserve Configuration 99
 reserve information and maintenance 5
 Reserves 3
 user information and maintenance 7

W

Wizards
 Create Course 20
 Create Reserve 28
 Duplicate Course 23
 Individual Reserve 64
 Modify Course 60
 Modify Reserve 62
 Receive ReserveReserves 96
 Remove Course 80
 Remove Reserve 78
 Session Settings 9