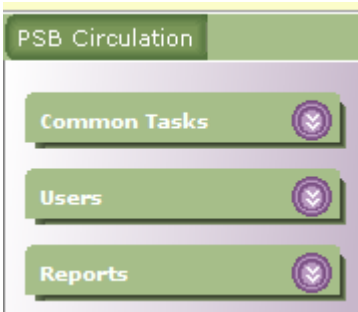
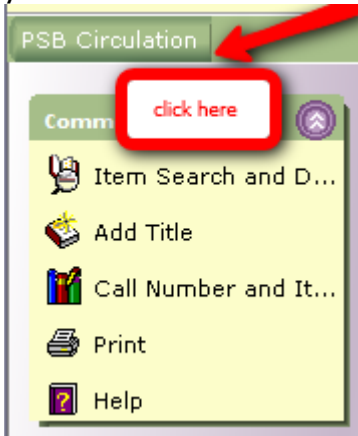


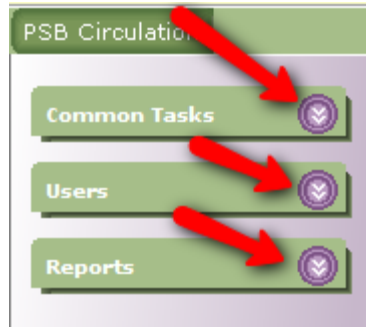
## Getting Started With Workflows Java Client

Log into Workflows Java Client using your school PIN.

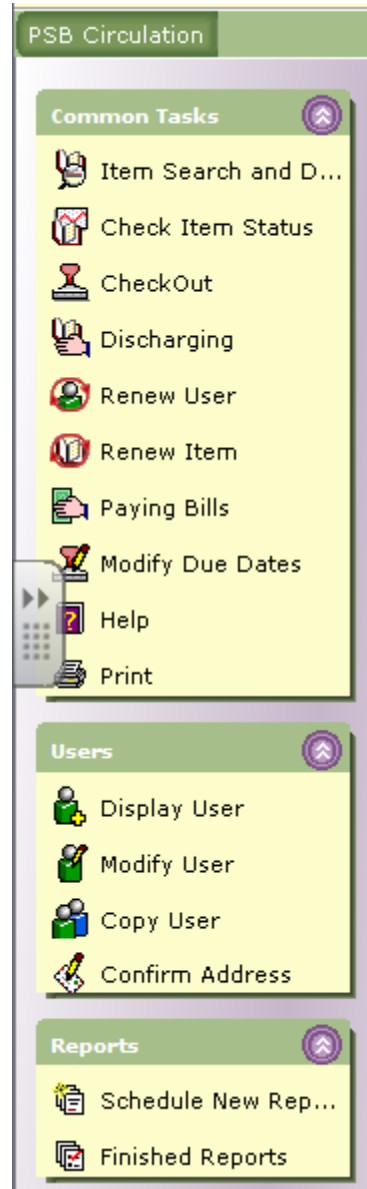
Click on PSB Circulation button on the top left of your screen.



This is what your side task bar will look like compressed.



Click on the purple arrows to open options within each tab.

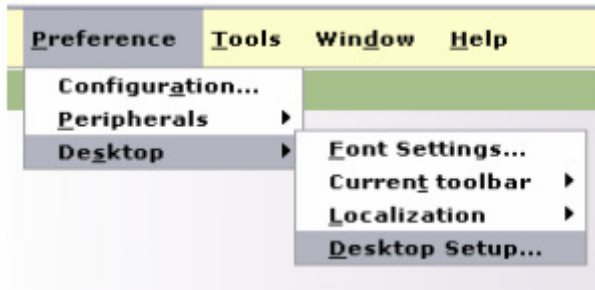


This is what your task bar will look like when it is fully open.

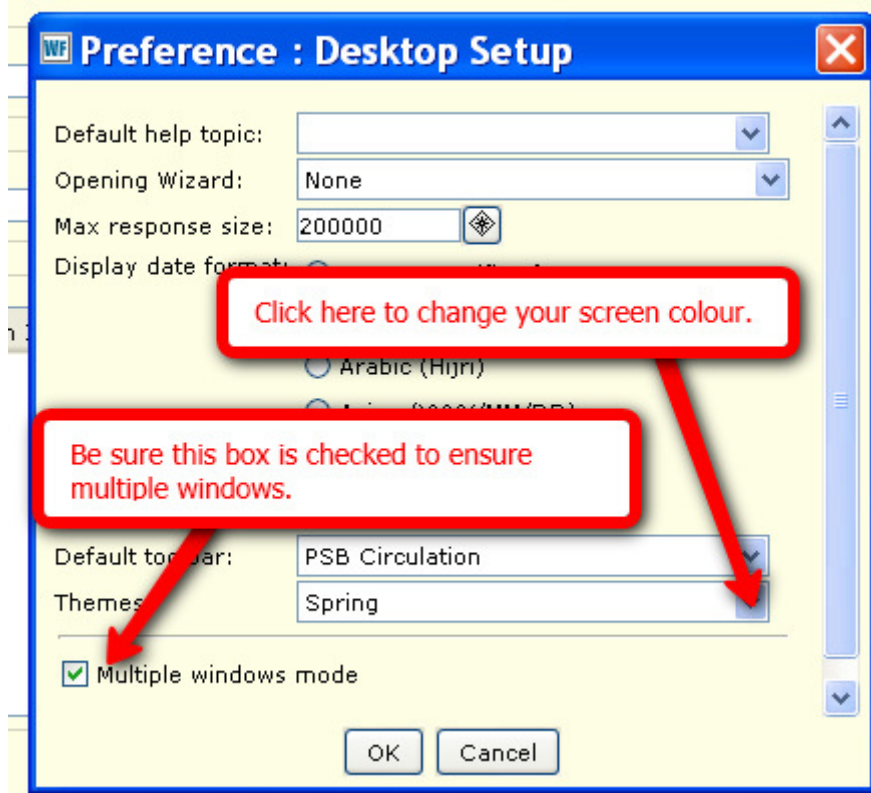
## Setting Your Preferences

Changing Your Colour Scheme

From the top tool bar, click on Preference -> Desktop -> Desktop Setup



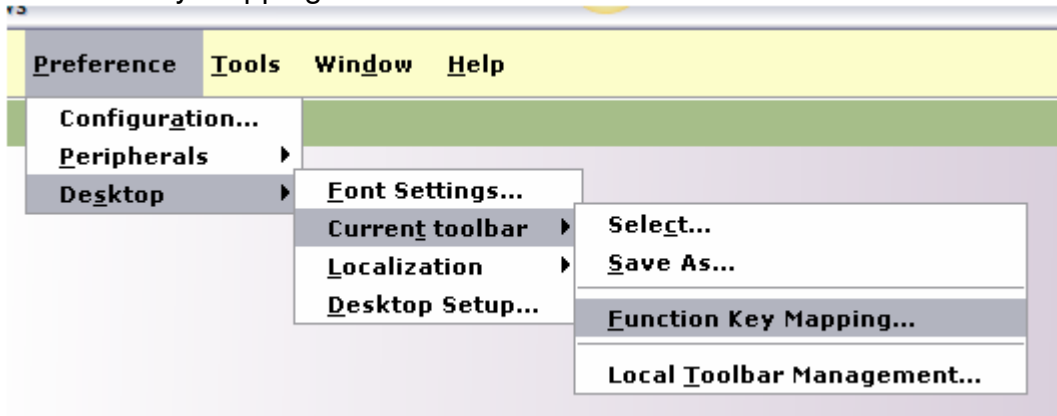
Click on the arrow beside the Themes tab. Choose from a variety of themes to select one that pleases you.



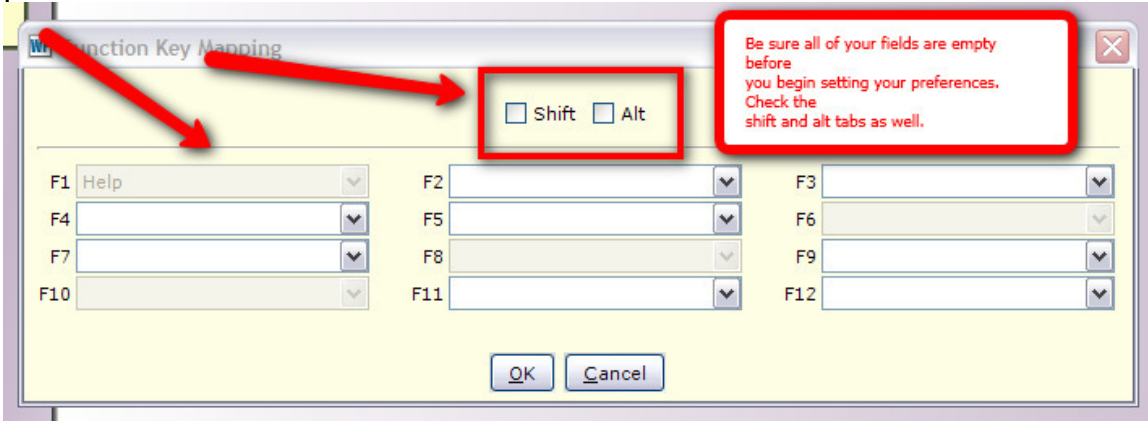
Be sure the Multiple windows mode box is checked.

## Setting Your Function Keys

Step 1: From the top toolbar in Circulation select Preference -> Current toolbar -> Function Key Mapping.

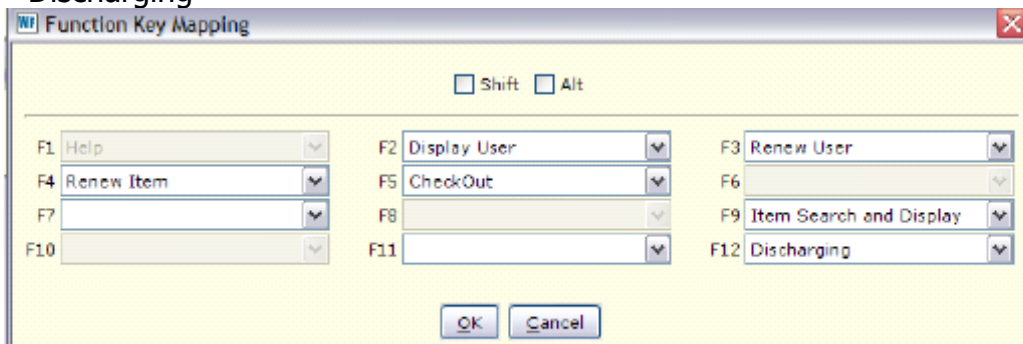


Step 2: Ensure all of the fields are empty before setting your Function Key preferences.



Step 3: Set your Function Keys as follows:

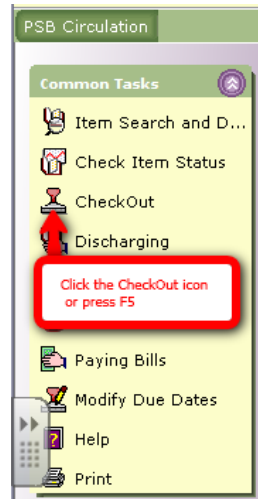
- F2 – Display User
- F3 – Renew User
- F4 – Renew Item
- F5 – Check Out
- F9 – Item Search and Display
- F12 – Discharging



## How to Checkout Items

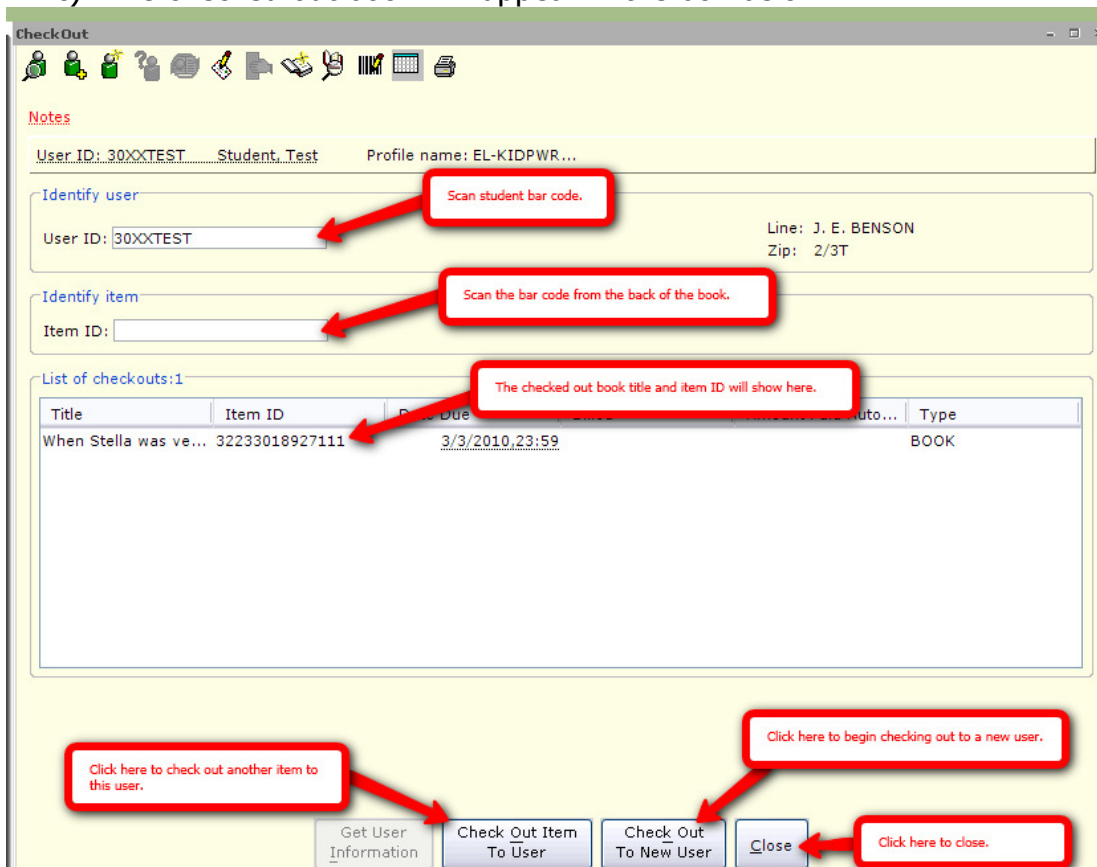
Step 1:

Click the CheckOut icon or press F5



Step 2:

- Scan the student bar code into the User ID box.
- Scan the bar code from the back of the book.
- The checked out book will appear in the box below.

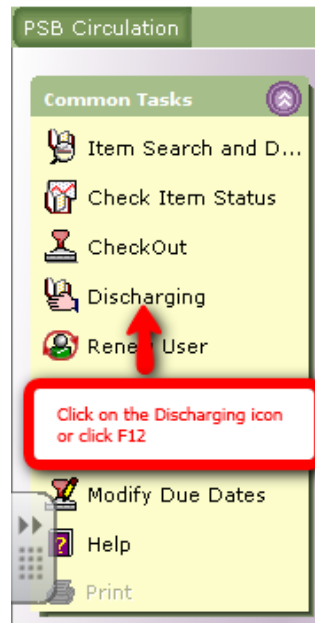


Options at the bottom of the screen include checking out additional materials to the same user, checking out materials to a new user or closing the checkout wizard.

## How to Discharge Items

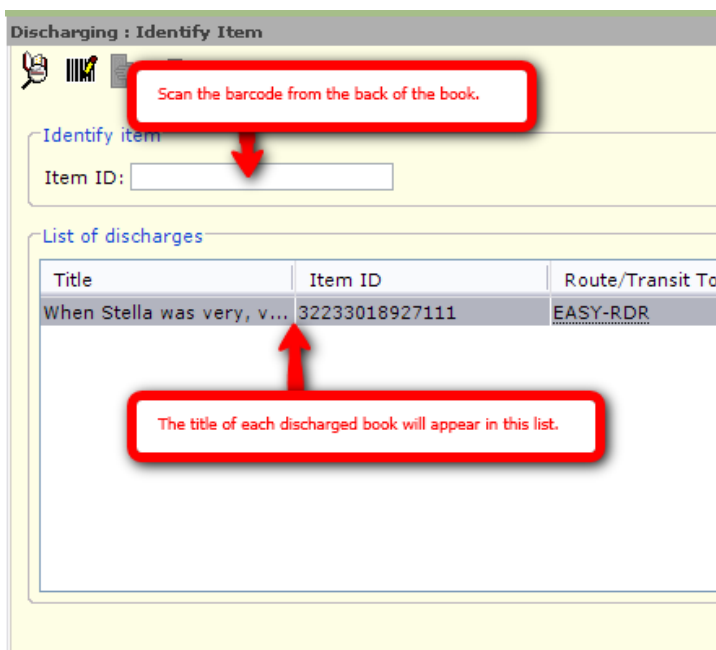
Step 1:

Click the Discharging icon or  
Press F12



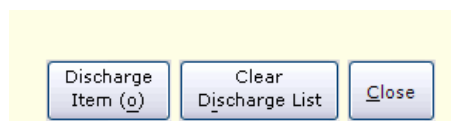
Step 2:

Scan the barcode from the back of the book to discharge.  
As you continue to scan book barcodes the titles will accumulate in a list.



Step 3:

Close wizard when finished.



## Adding a New User

When a new student arrives at your school, you must add the new student to the Workflows system.

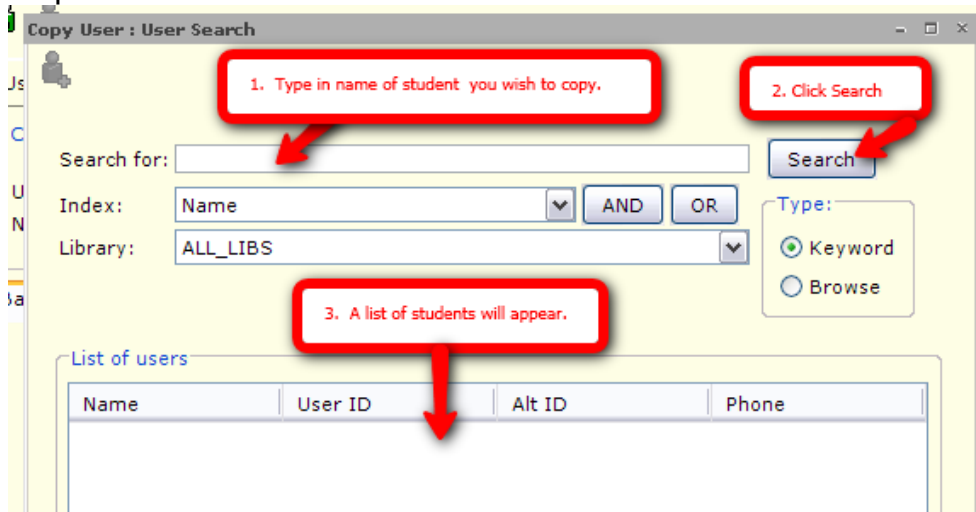
Get the new student 7 digit Trevlac number from your school secretary.  
Select a classmate's name from the homeroom of the new student.

From the Circulation Users Task Bar follow the following steps to clone a user.

Step 1:



Step 2:



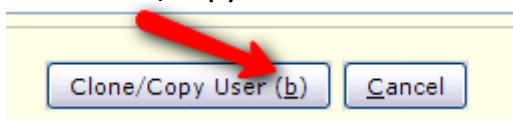
a. Type in the name of the classmate who exists in the new student's homeroom.

b. Click search.

c. A list of students may appear. Select the proper student from the list.

Step 3:

Click Clone/Copy User button at the bottom of the screen.



**Step 4:**

Type the new student's Trevlac number in the space provided for New ID.

Copy User : Clone/ Copy User

User ID: 30300964 Profile name: EL-KIDPWR...

Creating new user by copying information from:

User ID: 30300964

New ID:

**Step 5:**

Click Register User

Register User Modify Clone/ Copy This User to Another Close

**Step 6:**

Over-ride the highlighted name by typing in the name of the new student.

Basic Info Privilege Demographics Addresses Extended Info

Last name, first: Moore,Kasey

Title:

User ID: 30XXXXX

Alt ID:

Group ID:

Library: 3\_BENSON

Profile name: EL-KIDPWR

**Step 7:**

Click the Register User button again.

A new box will appear confirming that the new student has been copied and now exists in the system.

Complete

Moore,Kasey is registered

Clone/ Copy This User to Another

Make More Changes

Close

Register User Modify Clone/ Copy This User to Another Close

## **Modifying an Existing User**

A student is new to your school, however has been previously entered into the WorkFlows library system in another GECDSB school.

You must modify this student's record to indicate your school.

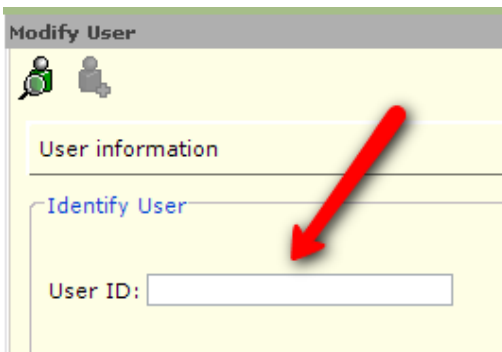
Get the new student's 7 digit Trevlac number from your school secretary.

From the Circulation Users Task Bar follow the following steps to modify a user.

Step 1:



Step 2:



Type the 7 digit Trevlac number of the new student into the User ID box.

Step 3:

- a) Use the drop down menu beside Library to select your school from the list.
- b) Click the Addresses tab at the top.



**Modify User**

**Notes**

User ID: 30XXTEST    Student, Test    Profile name: EL-KIDPWR

**Identify User**

User ID: 30XXTEST    **Click here to change your school in the Address tab.**

Basic Info    Privilege    Demographics    **Addresses**    Extended Info

Last name, first: Student, Test

Title:

User ID: 30XXTEST

Alt ID:

Group ID:

Library: 3\_BENSON

Profile name: EL-KIDPWR

**1. Click on the drop down menu to select your school.**

Get User Information    **Modify User**

**Step 4:**

- a) Change the second box to indicate your school name.
- b) Change the bottom box to indicate the appropriate homeroom for the new student.

c) When you are finished changing the information, click on the Modify User button at the bottom of the screen.

Modify User

Notes

User ID: 30XXTEST Student: Test Profile name: EL-KIDPWR...

Identify User

User ID: 30XXTEST Line: J. E. BENSON  
Email: N  
Zip: 2/3T

Basic Info Privilege Demographics Addresses Extended Info

Primary:  Address 1  Address 2  Address 3

Address 1

DAYPHONE [v] [ ]

LINE [v] J. E. BENSON

EMAIL [v] N

LOCATION [v] [ ]

STREET [v] [ ]

CITY/STATE [v] [ ]

ZIP [v] 2/3T

Change to your school name.

Change to the appropriate homeroom.

Click here when changes have been made.

Modify User Modify a Different User (b) Close

Step 5:

A box will come up to indicate the changes have been made. Click Close.

WF Complete

Record Updated

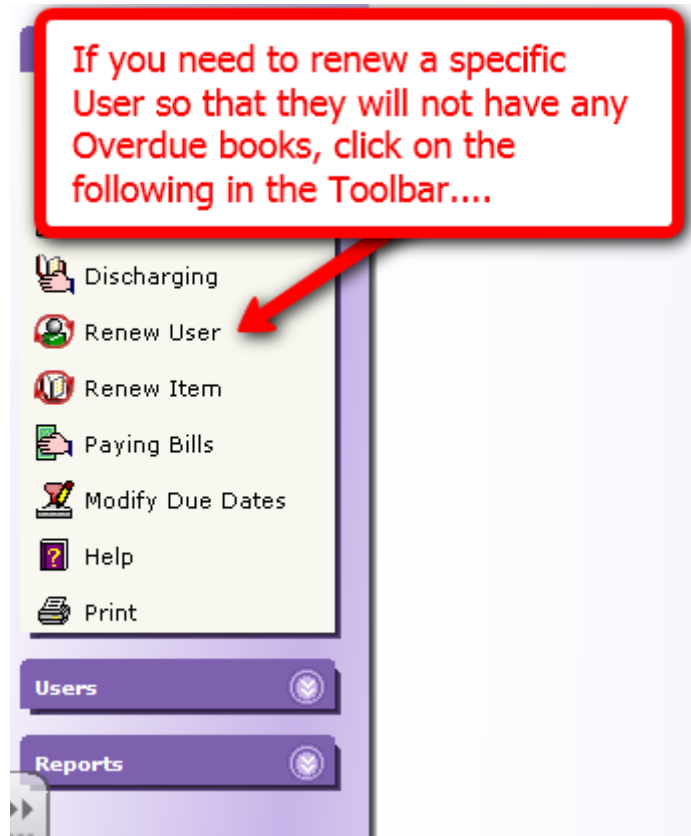
Modify Another User

Make More Changes

Close

## Renewing a User

Step 1:



## Step 2:

Renew User

User information

Identify User

User ID:

Current user checkouts

Items eligible for renewal:

Select All  Select all seen

Renew	Seen	Title	Item ID
-------	------	-------	---------

When the "Renew User" screen appears, you can either scan the User's name, or you can manually enter the User's name here.

## Step 3:

Renew User : User is BLOCKED

User is BLOCKED

Alerts

Overdues: 2

Notes

Select All  Select all seen

Enter Override & Renew Items Investigate Cancel

At this point, you can click the "Investigate" button to see what the charges are to that User.

If you are certain that you would like to renew all charges that a User might have, click on the "Enter Override & Renew Items" button.

## Step 4:

The screenshot shows the 'Renew User' interface. At the top, there are icons for help, search, and other functions. Below that, there are tabs for 'Alerts' and 'Notes'. The user information section shows 'User ID: 01200270', 'Lee, Jenny', and 'Profile name: EL-KIDPWR...'. The 'Identify User' section has a 'User ID' field with '01200270' entered. The 'Current user checkouts' section shows 'Items eligible for renewal: 2'. There are two checkboxes: 'Select All' (unchecked) and 'Select all seen' (checked). Below this is a table with columns 'Renew', 'Seen', 'Title', and 'Item ID'. The table contains two rows of data.

Renew	Seen	Title	Item ID
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Cool Stuff 2.0 and how it works	32233023930738
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Invention	32233023984610

**You can then renew each item by checking in the individual boxes beside the item, or you can click the "Select All" box to the left of the screen.**

## Step 5:

The screenshot shows a dialog box titled 'Lee, Jenny is Blocked'. It contains a warning icon and the following information: 'User ID: 01200270', 'Name: Lee, Jenny', and 'User block override:'. There are 'OK' and 'Cancel' buttons. Below the dialog box, a 'Renew Items' button is highlighted, and the 'Select All' checkbox is checked.

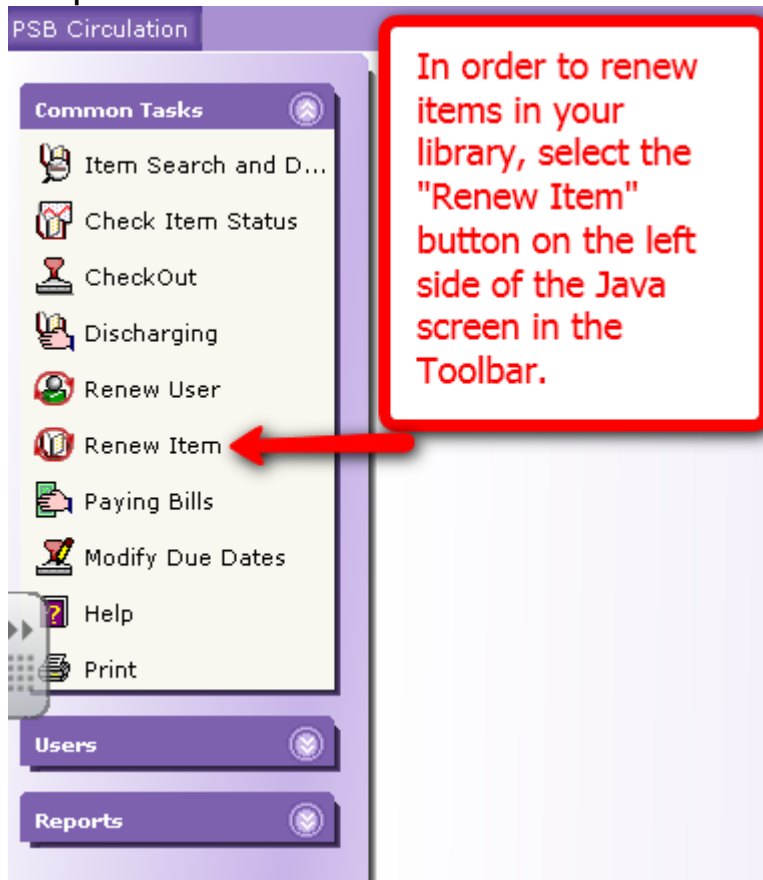
**After clicking on the "Enter Override & Renew Items" button, you will observe the User's ID and their name. In the "User block override", enter the word, "candy". From there, click "OK".**

## Step 6:



# Renewing an Item

## Step 1:



PSB Circulation

**Common Tasks**

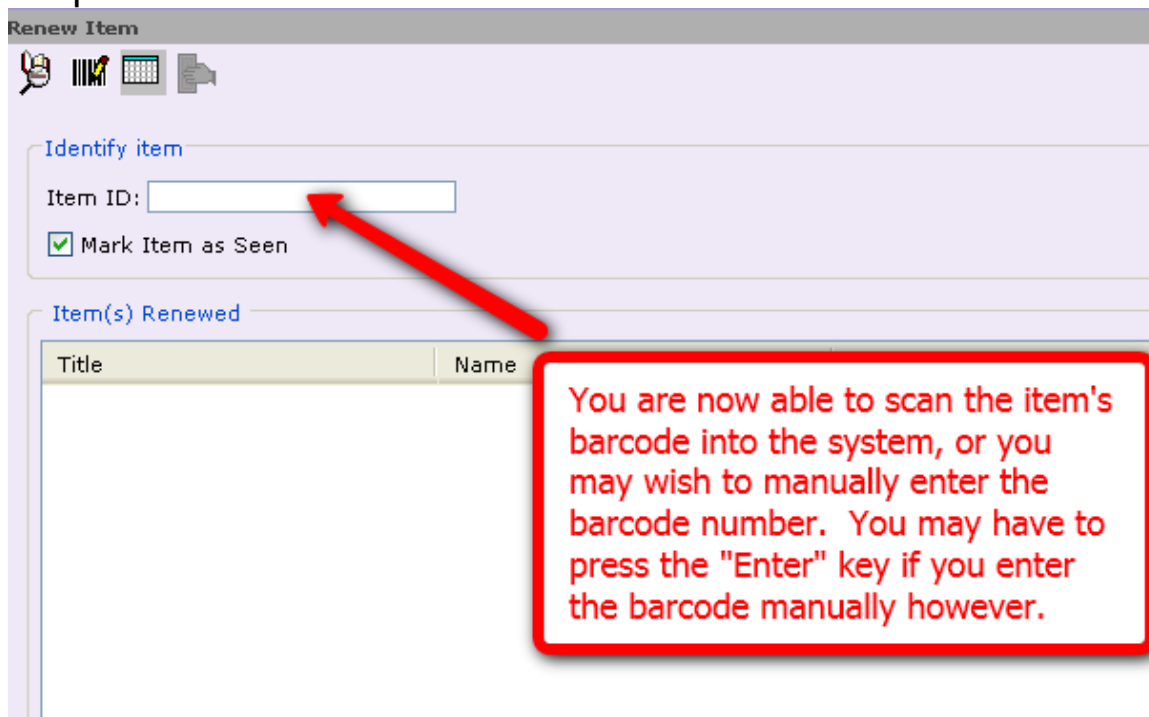
- Item Search and D...
- Check Item Status
- CheckOut
- Discharging
- Renew User
- Renew Item**
- Paying Bills
- Modify Due Dates
- Help
- Print

**Users**

**Reports**

In order to renew items in your library, select the "Renew Item" button on the left side of the Java screen in the Toolbar.

## Step 2:



Renew Item

Identify item

Item ID:

Mark Item as Seen

Item(s) Renewed

Title	Name
-------	------

You are now able to scan the item's barcode into the system, or you may wish to manually enter the barcode number. You may have to press the "Enter" key if you enter the barcode manually however.

### Step 3:

Renew Item

Identify item

Item ID:

Mark Item as Seen

Item(s) Renewed

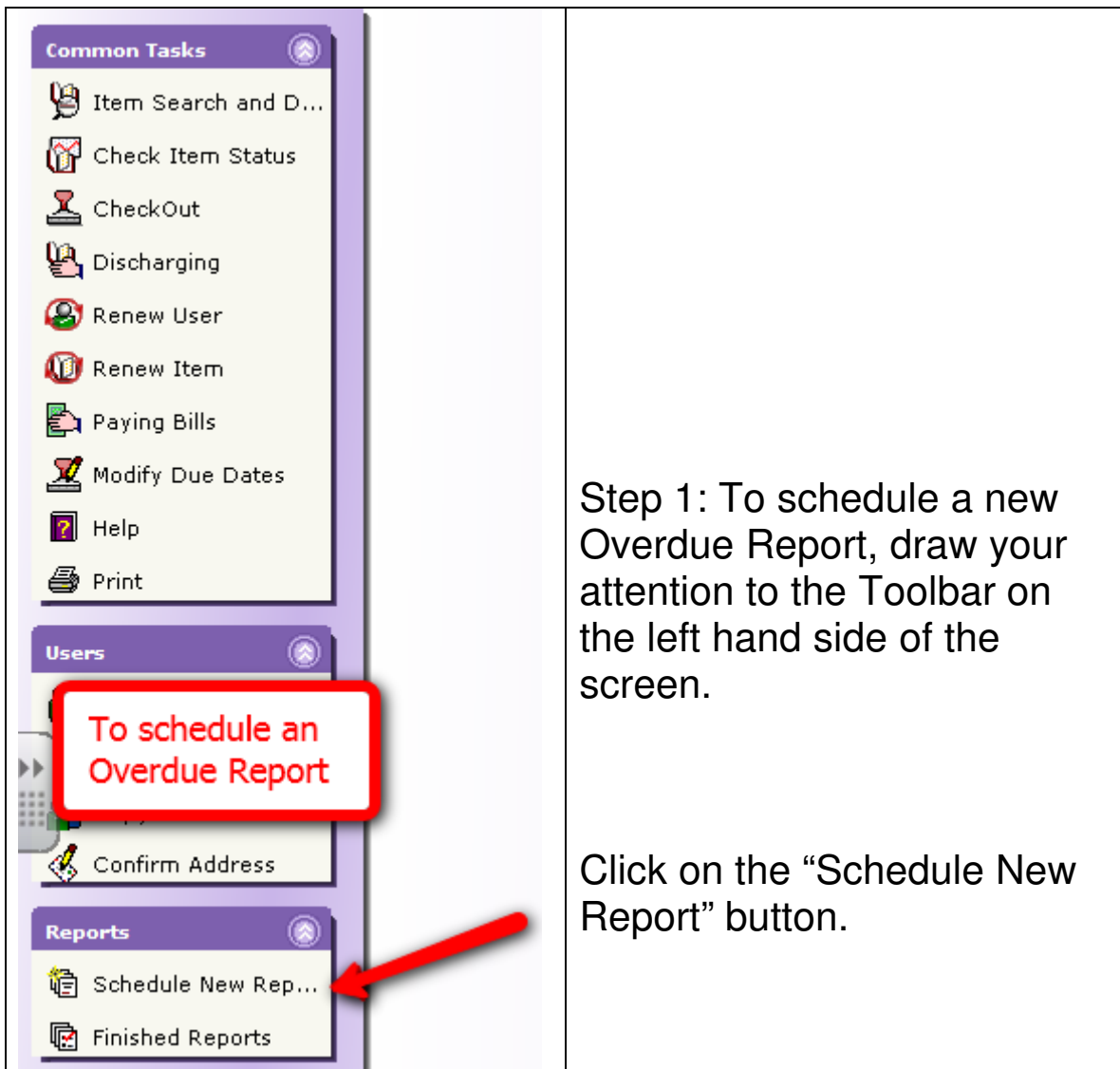
Title	Name	Date Due	Amount Bil
Diary of a wimpy kid : dog days	Adom, Dennis	3/3/2010,23:59	

Once you have renewed your item and pressed "Enter", your item will then be displayed on the "Items Renewed" screen as shown in the example above. You will also be able to take note of the new due date.



## Generating Overdue Reports

You actually do not have to wait for your assigned Overdue Report in order to print one whenever you would like. Most schools are able to gain access to an Overdue Report every Monday morning – now you can run one whenever you feel it might be necessary.



The screenshot shows a sidebar menu with three main sections: Common Tasks, Users, and Reports. The Common Tasks section includes: Item Search and D..., Check Item Status, CheckOut, Discharging, Renew User, Renew Item, Paying Bills, Modify Due Dates, Help, and Print. The Users section includes: Confirm Address. The Reports section includes: Schedule New Rep... and Finished Reports. A red box highlights the 'Schedule New Report' button in the Reports section, with a red arrow pointing to it.

**To schedule an Overdue Report**

Step 1: To schedule a new Overdue Report, draw your attention to the Toolbar on the left hand side of the screen.

Click on the “Schedule New Report” button.

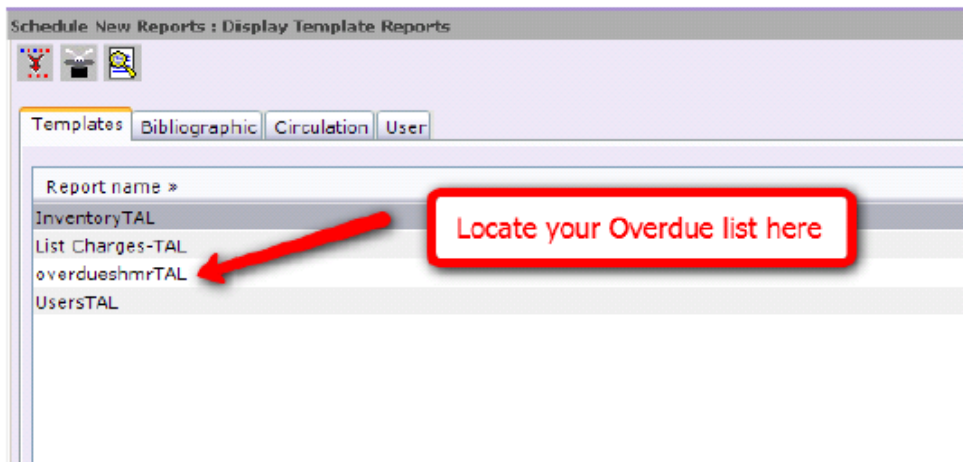
Step 2: When this screen appears, unclick the "Include log". Click "OK", which is located at the bottom of the screen.

The screenshot shows a 'Defaults' dialog box with the following sections and options:

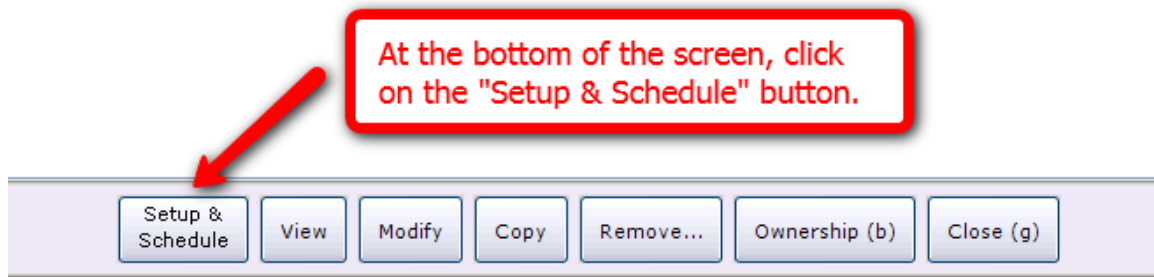
- Application to view reports:** c:\program files\Windows NT\accessories
- Application to print reports:** c:\program files\Windows NT\accessories
- Setup & Schedule:**
  - Display report source column
  - Notify owner when report is finished
  - Send notices automatically
  - Preserve template owner
- View, Print, or Email Finished Reports:**
  - Format report
  - Include log
  - Include results
  - Display format page
- Format Page:**
  - Character set table: DEFAULT
  - Page length: 60
  - Page width: 80
  - Top margin: 3
  - Bottom margin: 0
- View, Print, or Email Finished Notice Reports:**
  - Recipients:  All
  - Only those with email addresses
  - Only those without email addresses

At the bottom right, there are 'OK' and 'Cancel' buttons. A red arrow points from the 'Include log' checkbox to a red callout box containing the text 'Unclick the "Include log"'. Another red arrow points from a second red callout box containing the text 'Click "OK" to generate your Overdue Report' to the 'OK' button.

Step 3: Locate and click on your appropriate Overdue List.



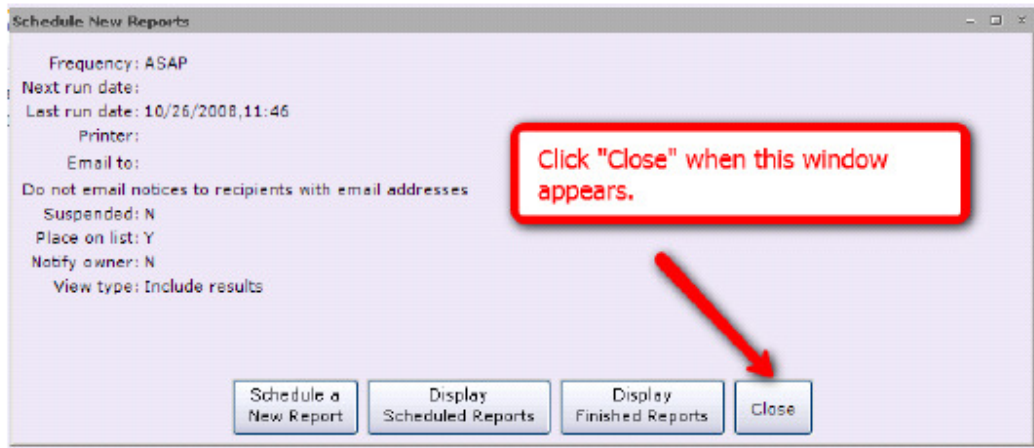
Step 4:



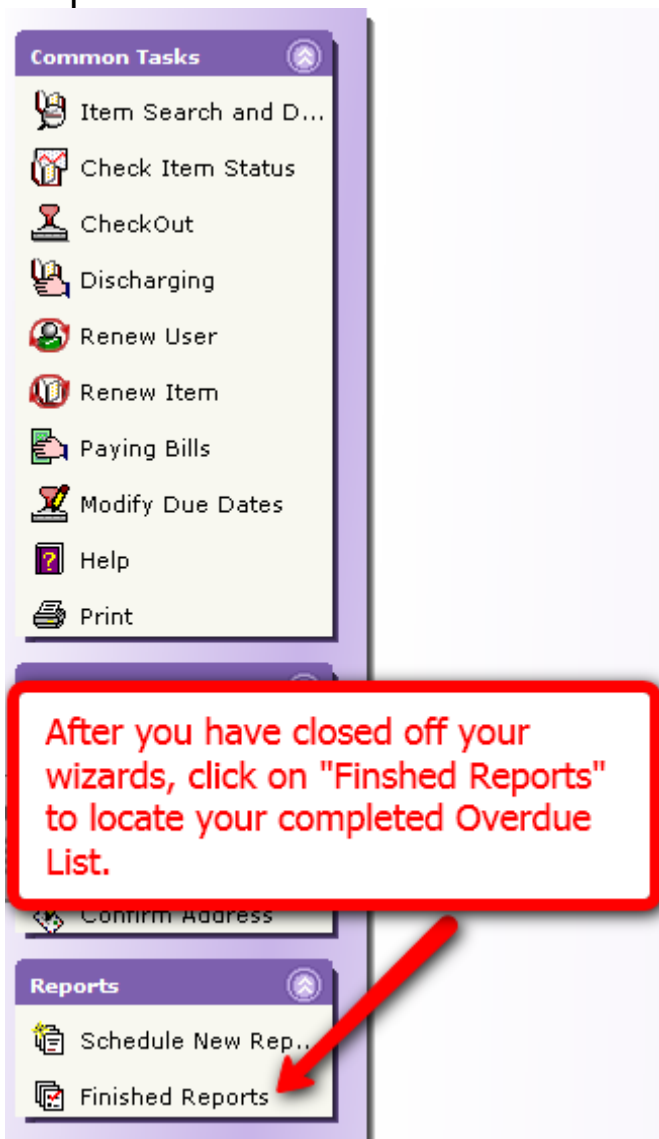
Step 5:



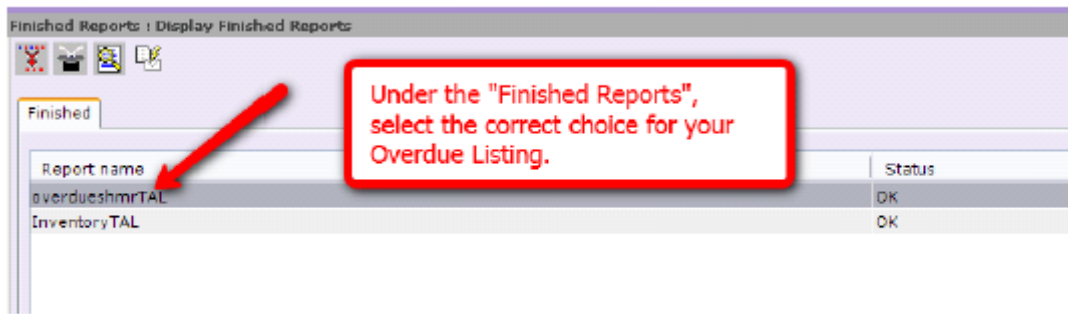
## Step 6:



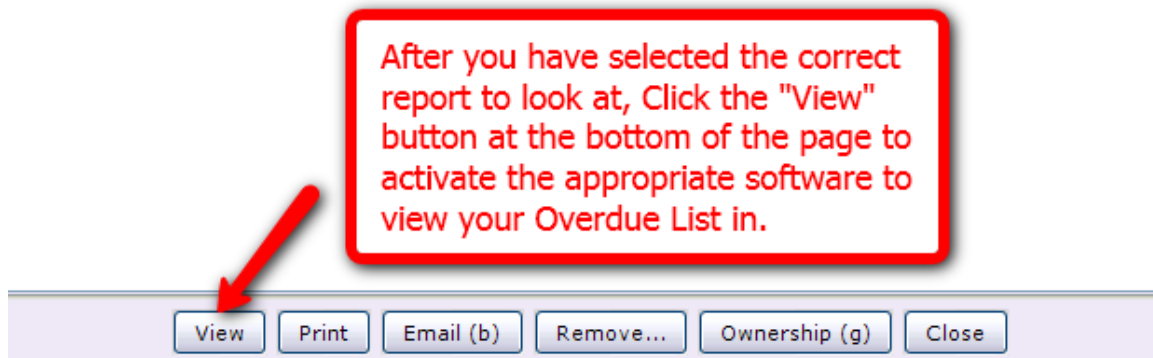
## Step 7:



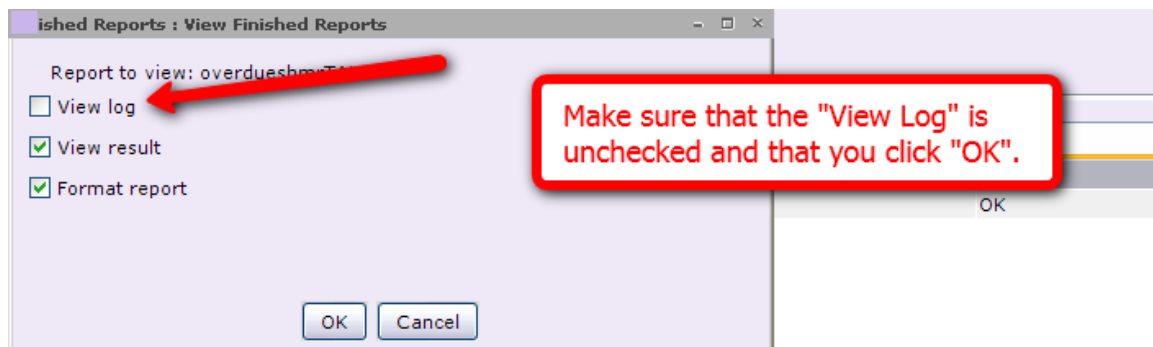
## Step 8:



## Step 9:



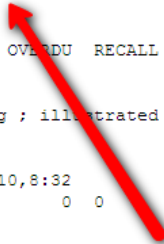
## Step 10:



# Step 11:

Talbot Trail Library Overdues by Homeroom (1D)  
Produced Wednesday, February 17, 2010 at 11:09 AM

USER NAME	USER ID	CHARGED	RENEWALS	UNSEEN	OVERDU	RECALL
E LON copy:2	32233023904683					
Pirates don't change diapers / written by Melinda Long ; illustrated by David Shannon.						
Abu-Libdeh,Bayan	XXXXXXXXXX	1/28/2010,8:32	0	0	0	0
2/11/2010,23:59	CHECKEDOUT		3_TALBOT			
E CHI copy:1	32233023987423					
I will never not ever eat a tomato / Lauren Child.						
Child, Lauren.	XXXXXXXXXX	1/28/2010,8:32	0	0	0	0
2/11/2010,23:59	CHECKEDOUT		3_TALBOT			
AHL copy:1	32233023939242					
Previously / Allan Ahlberg ; Bruce Ingman.						
Ahlberg, Allan.	XXXXXXXXXX	1/28/2010,8:35	0	0	0	0
2/11/2010,23:59	CHECKEDOUT		3_TALBOT			
E THO copy:1	32233023897432					
Winnie's midnight dragon / Valerie Thomas and Korky Paul.						
Thomas, Valerie.	XXXXXXXXXX	1/28/2010,8:36	0	0	0	0
2/11/2010,23:59	CHECKEDOUT		3_TALBOT			



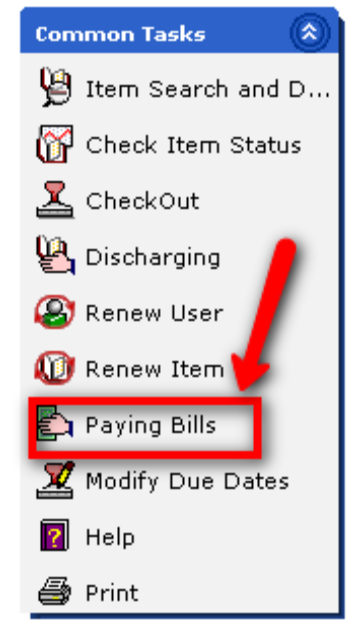
Here is an example of an Overdue List..... from here, you may choose to print, etc...

## Paying Fees – Secondary

Students with overdue fees can pay/be forgiven as follows:

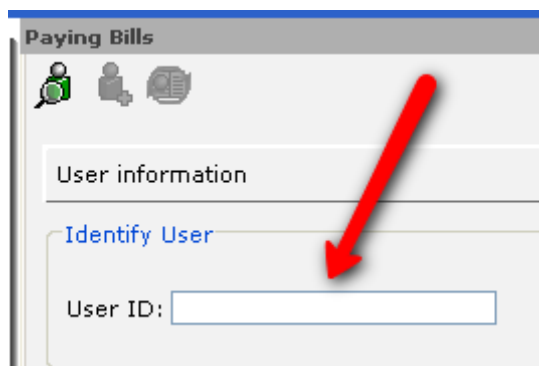
Step 1:

Click on the Paying Bills icon on the Common Tasks tool bar.



Step 2:

Scan in student ID for the student with overdue fees.



Step 3:  
To Pay a Fee

- a) Check total overdue fee owed.
- b) Type in the amount of student payment.
- c) Select the payment type.
- d) Click return to enter payment.

To Forgive a Fee

- a) Change payment type to – forgive.
- b) Click return to forgive the fee.

The screenshot shows the 'ying Bills' application window. At the top, there are 'Alerts' and 'Notes' tabs. Below them is a 'User ID' field and a 'Profile name' field. The 'Identify User' section contains another 'User ID' field and 'Line' and 'Zip' information. The 'Total bills and payments' section shows a summary of bills and a 'Payment' form with a 'Payment type' dropdown menu. The 'Individual Bills and Payments' table lists a bill for 'Abduction' with an amount of \$0.60. At the bottom, there are several buttons: 'Get User Information', 'Pay Bills (0)', 'Pay More Bills', 'Make Payments for Another User', and 'Close'. Red callout boxes with arrows point to specific elements: 'Look here for overdue fee.' points to the 'Total owed' field; 'Type in payment amount here.' points to the 'Payment' input field; 'Select payment type or forgive the fee.' points to the 'Payment type' dropdown; 'Press "return" or click Pay Bills button' points to the 'Pay Bills (0)' button; 'To make payments for another user click here.' points to the 'Make Payments for Another User' button; and 'Click here to close.' points to the 'Close' button.

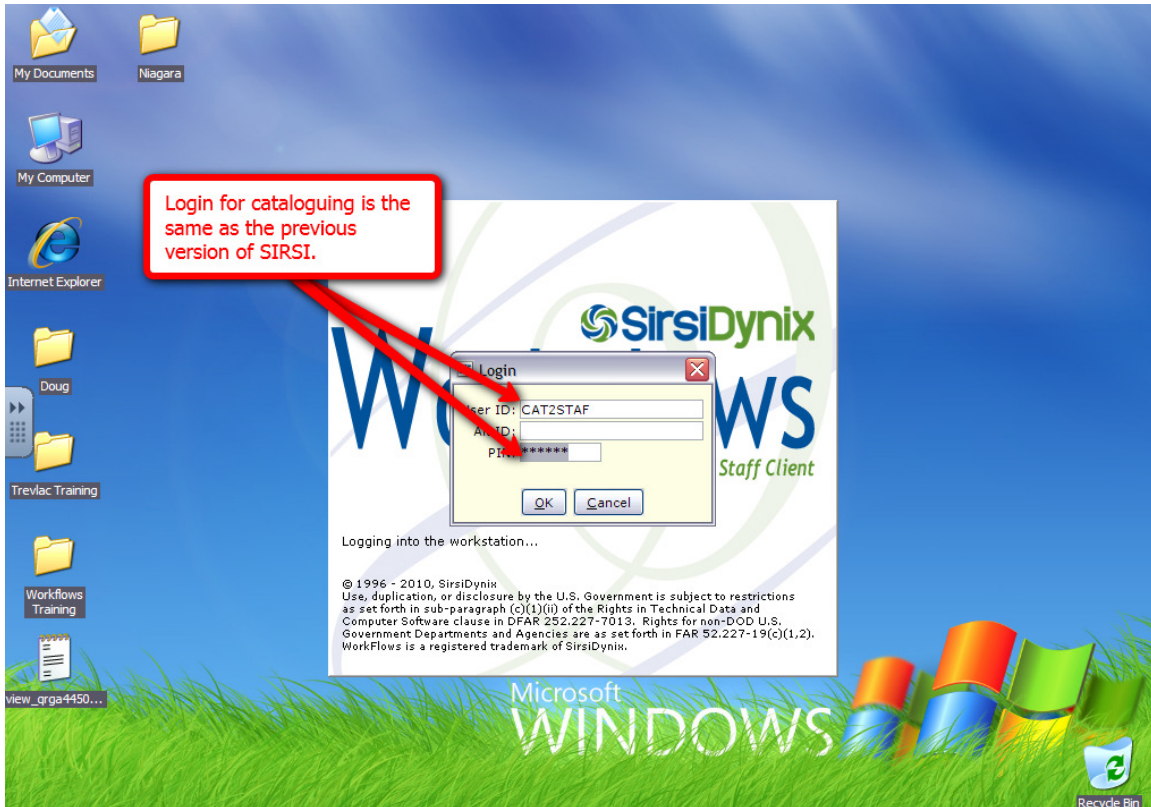
Title	Item ID	Reason	Owes	Payment Type	Payment	Change	Billed	Date
Abduction	32233012300901	OVERDUE	\$0.60	CASH			\$0.60	10/22/2007



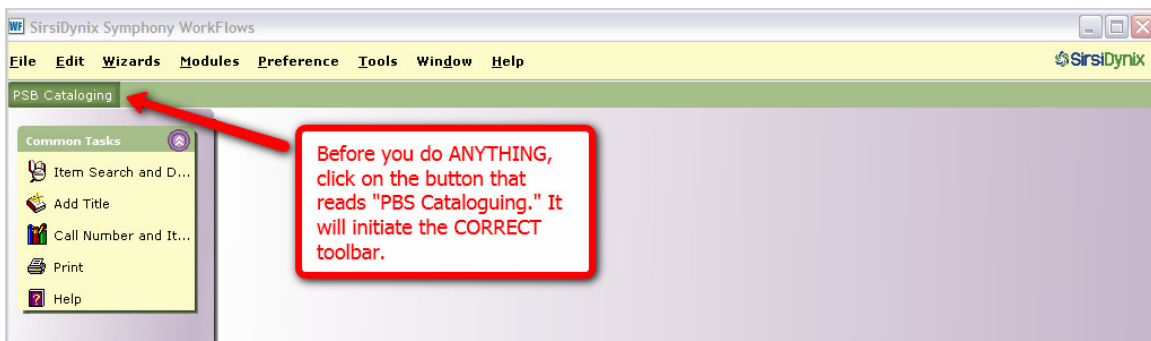
# Cataloguing with Java Client: Logging On

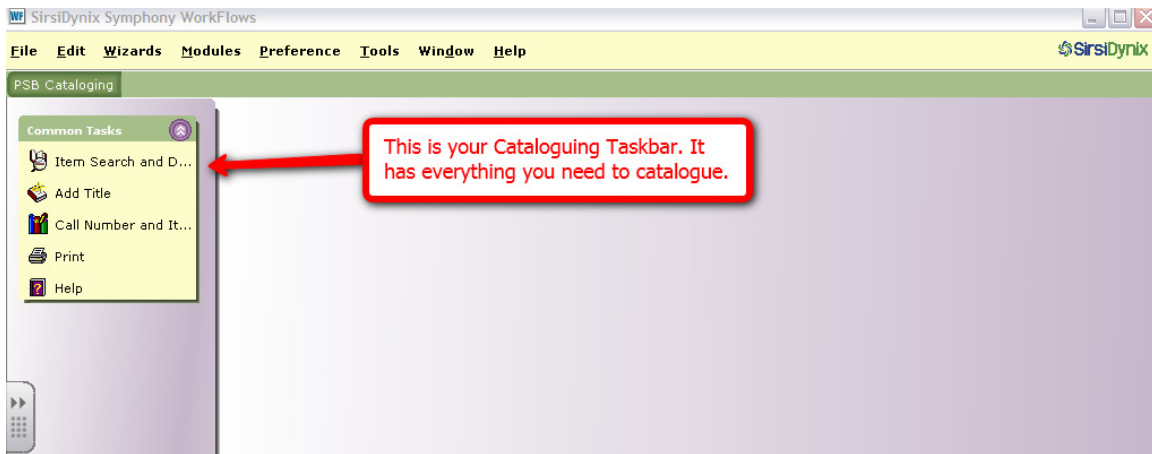
When you want to catalogue resources, you need to use a particular cataloguing login. For security, do not post this login or password where it is accessible to others.

Open the Java Client from your desktop.

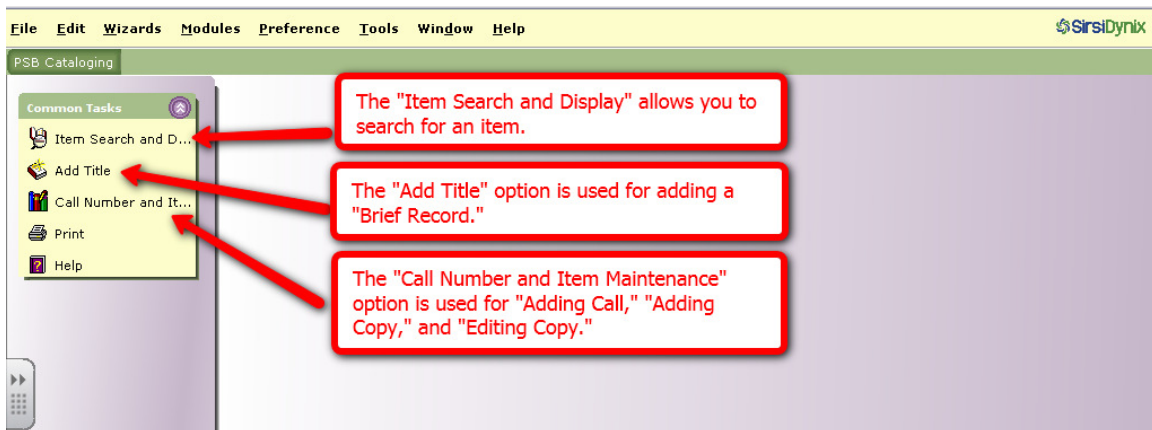


The opening screen in Cataloguing will show the taskbars of your last visit, even if the button shows you are in Cataloguing. To be sure you have the correct taskbars, click the button as shown:





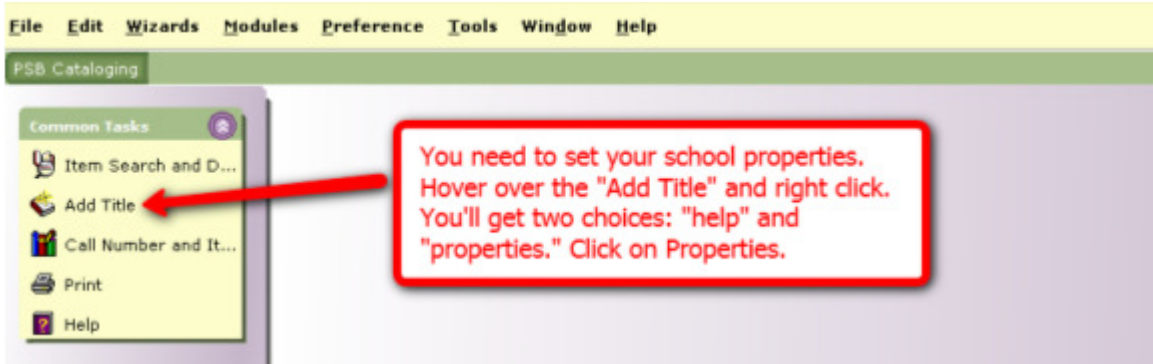
Here is an explanation of the Cataloguing Taskbar's tools:



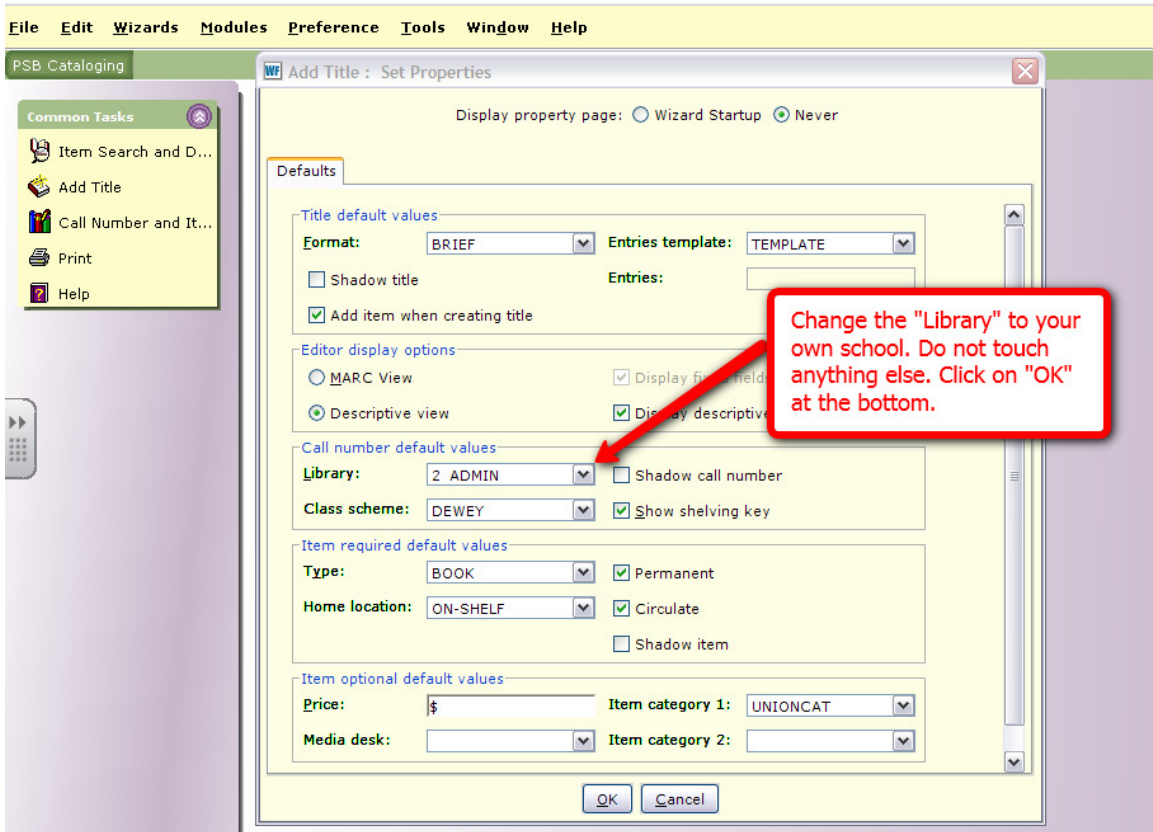
Now you need to set your cataloguing properties...Go to the "Cataloguing with Java Client: Setting Properties" pages.

# Cataloguing with Java Client: Setting Properties

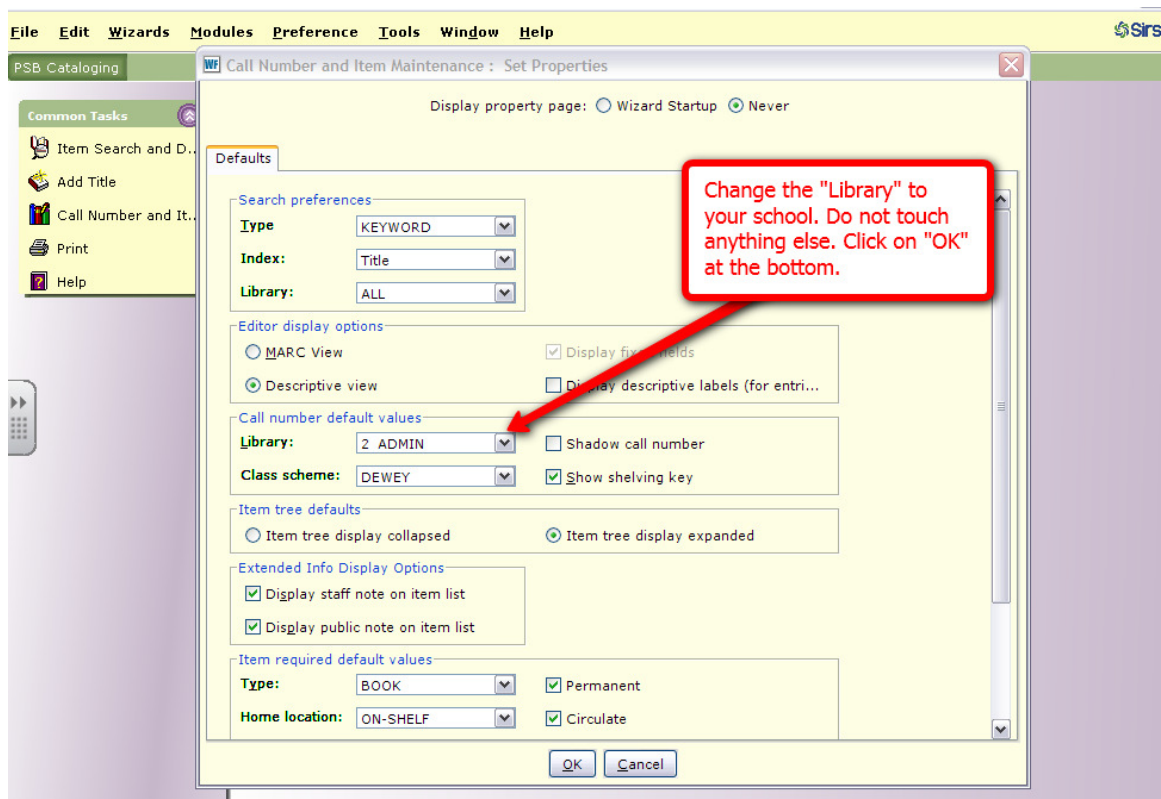
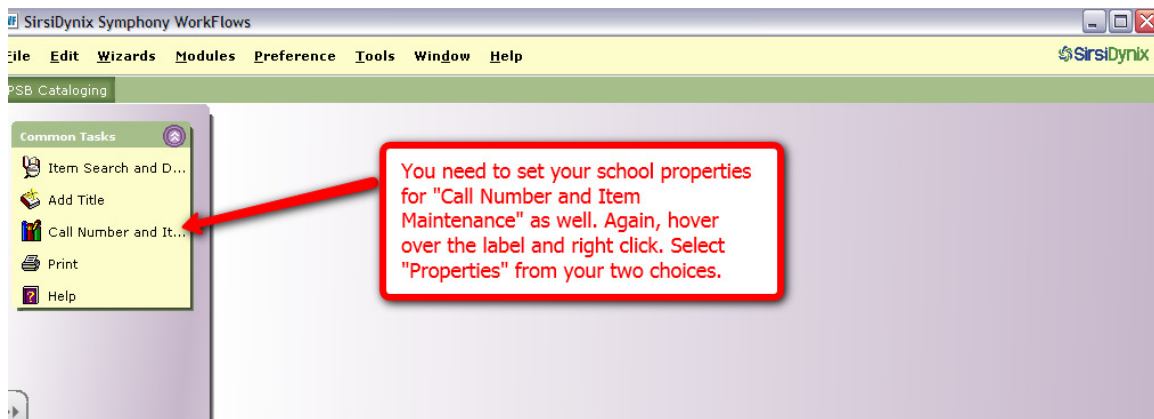
In order to catalogue your resources correctly, you have to set your own school's properties in the program. These properties are specific to each computer's hard drive. If you have more than one SIRSI computer, you will have to set the school properties for each computer you use.



When you choose the "Properties" tab, you get the following screen:



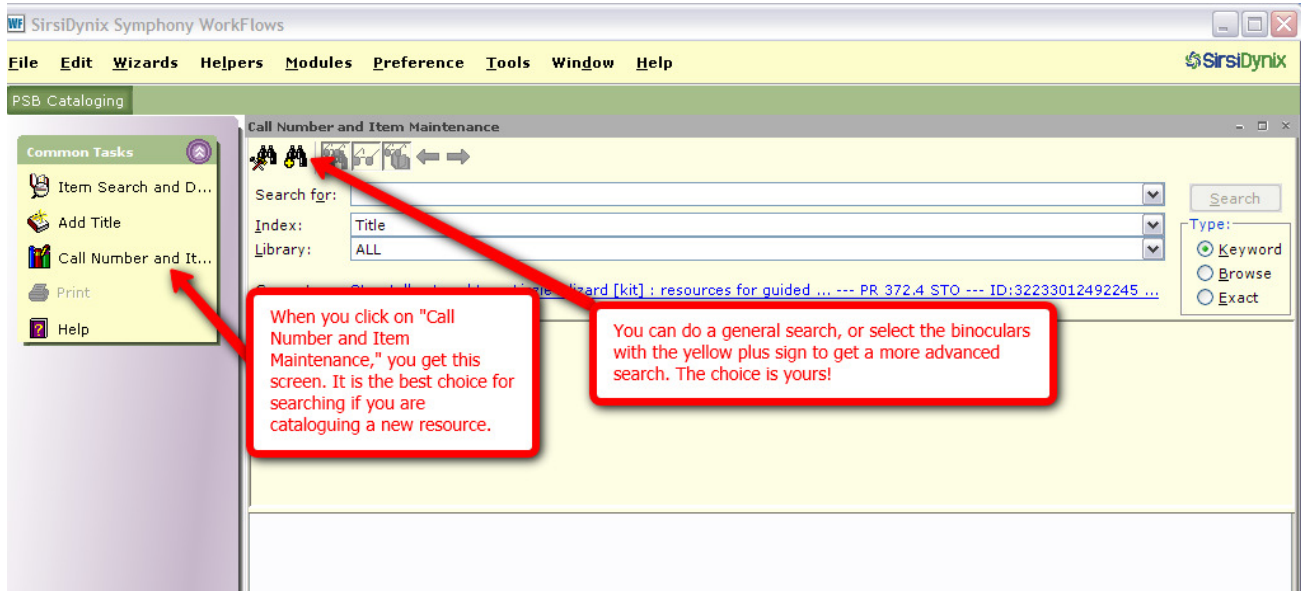
You'll do this for "Call Number and Item Maintenance" as well...



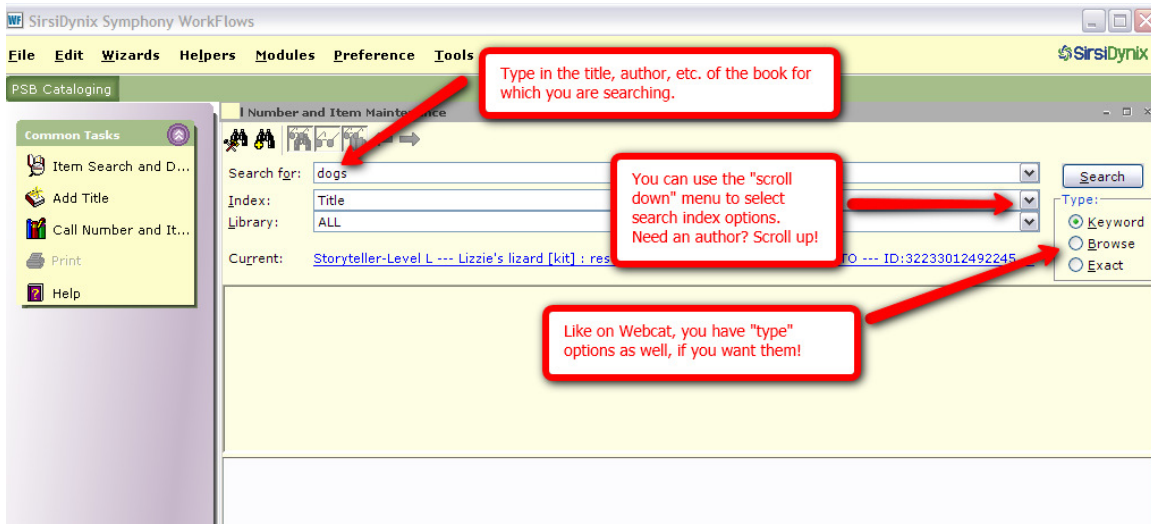
Once your properties are set, you are ready to start cataloguing! Go to "Cataloguing with Java Client: Doing the Search" to start the process!

# Cataloguing with Java Client: Start by Searching

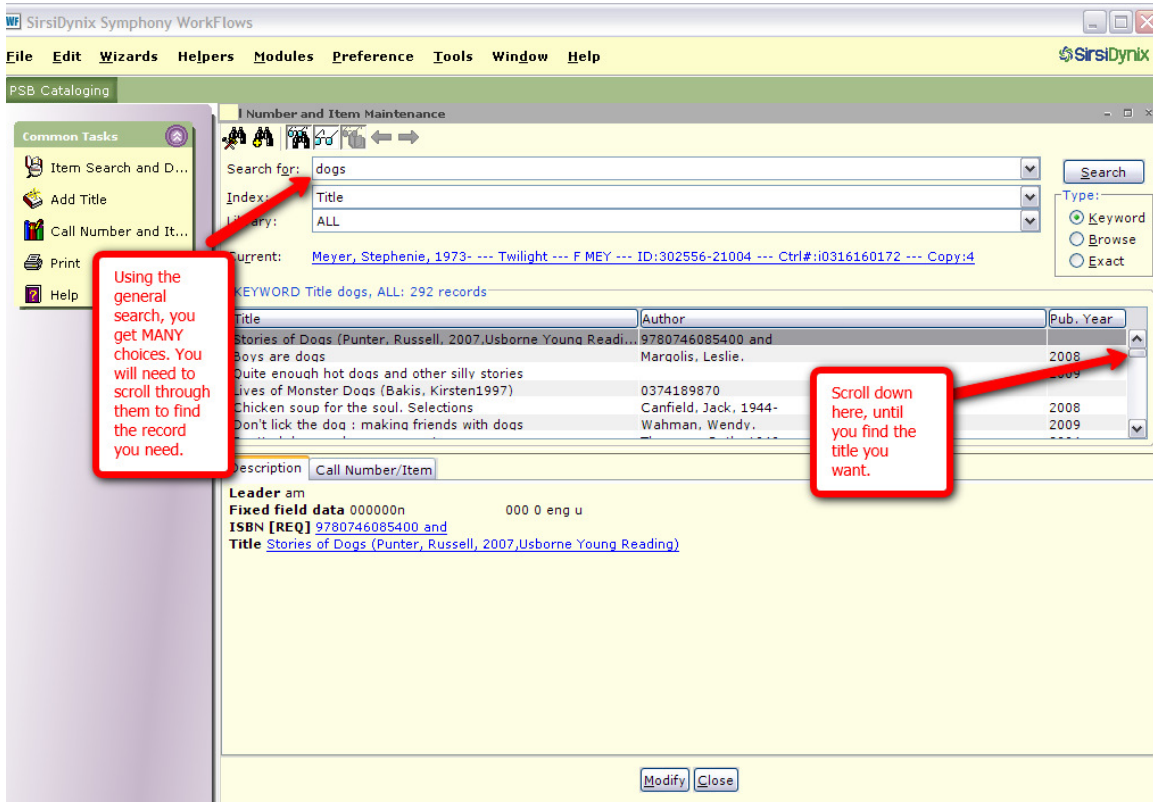
Cataloguing involves putting a resource from your collection into the system. It always starts with a search. To save time, use "Call Number and Item Maintenance" to begin your search...



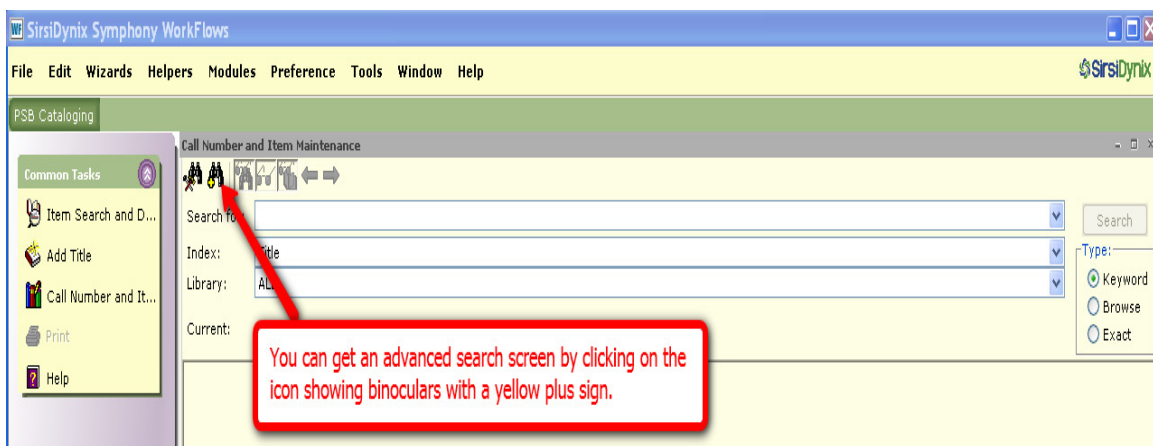
The general search function allows you to search in various ways...



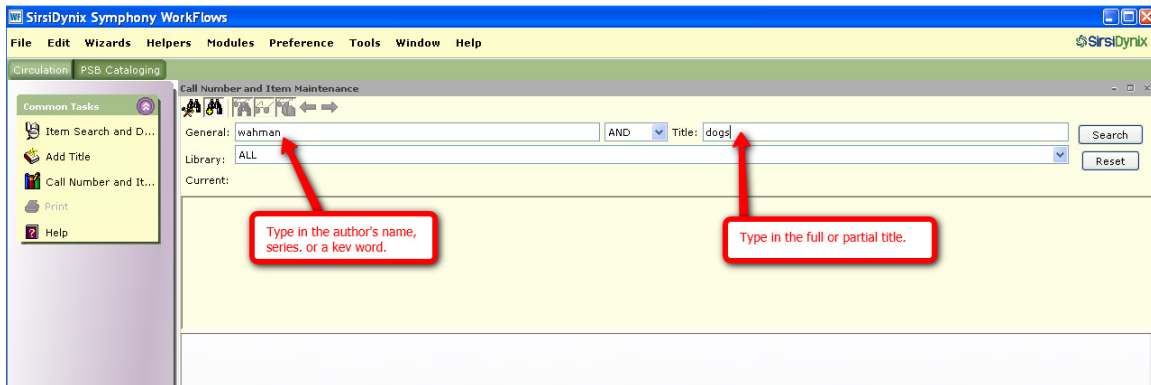
If you've used the general search, you will likely have many choices from which to choose.



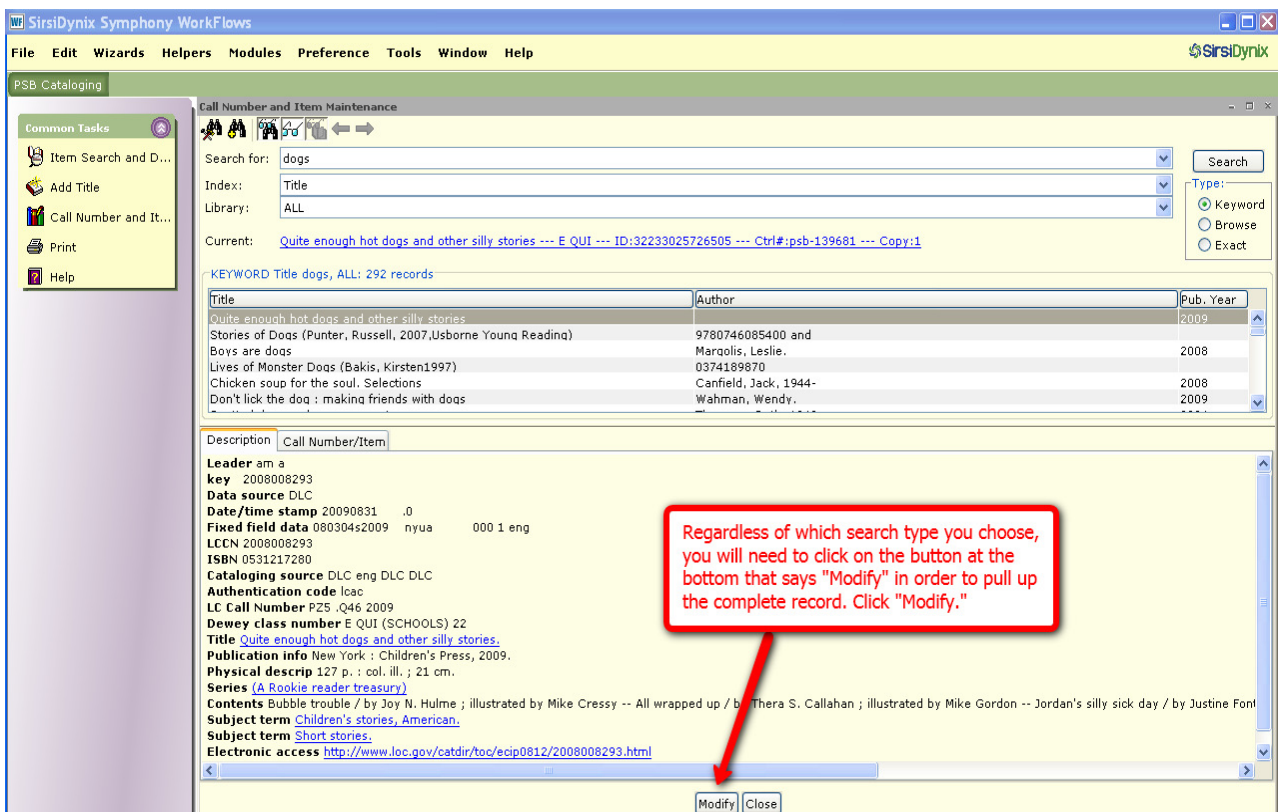
You can also do an advanced search to get more specific responses. You do this by clicking the icon that shows binoculars with a yellow plus sign.



Then you get an advanced search screen that looks like this:



Don't forget to click "Modify" at the bottom, in order to open the full record!



Regardless of whether you do a general or an advanced search, you will end up with **one of three results**:

- a) You find the resource listed as being at other schools, but **not at your school**. (You will need to **"ADD CALL"**)
- b) You find your school **already has** at least one copy of the resource already. (You will need to **"ADD ITEM"**)
- c) You learn that **no school has this resource** yet. Your school will be the first. (You will need to **"ADD TITLE"**)

Now go to the instructions for "Adding Call, Adding Item, or Adding Title" to learn how to complete your cataloguing!



## Cataloguing with Java Client: Adding Call, Adding Item or Adding Title?

If you've searched for a resource and found an existing record for it, your next step involves seeing if your school is listed on the "Call Number/Item" tab. **Note:** the record defaults to show the first school, alphabetically, that has that book. Scroll through the list to see if your school is present.

The program automatically defaults to the top school in the list. You will see this school name show up in three places (note the arrows)

You need to scroll down to locate your school in the list. Once you select your school (if indeed you have a copy of the book in your collection already), the defaults will change.

**NOTE:** If the record shows up with call numbers starting with **XX**, this record is not yet complete. You **CANNOT** link to this record! Put that book aside. Frequently check back to discover if the record is complete (i.e. the call numbers have been designated.)

At this point the Java Client gives you two options, both from the same screen. If your school name doesn't appear, then your library does not own a copy of this resource yet. You will "Add Call." If your school name does appear, you have at least one copy of the book already in your school's collection. You will "Add Item."

SirsiDynix Symphony WorkFlows

File Edit Wizards Helpers Modules Preference Tools Window Help

PSB Cataloging

Call Number and Item Maintenance

Don't lick the dog : making friends with dogs / Wahman, Wendy.

Control Bibliographic Call Number/Item Bound-with

Common Tasks

- Item Search and D...
- Add Title
- Call Number and It...
- Print
- Help

Call number information

Call number: 636.7 WAH Class scheme: DEWEY

Call library: 2\_KINGS-PS Shelving key: 636.7 WAH

Shadow call number N

Item information

Item ID: 32233026047679 Copy number: 1

Type: BOOK Item library: 2\_KINGS-PS

Home location: NONFICTION Current location: NONFICTION

Item cat1: Item cat2:

Number of pieces: 1

Charges: \$19.90

Permanent:  Shadow item:

Extended information

Tag Contents

CIRCNOTE

PUBLIC

STAFF

Date created: 10/7/2009

Date last charged: 1/21/2010

Date due: none

Last discharged: 2/4/2010,10:01

Date inventoried: Never

Times inventoried: 0

Last activity: 2/4/2010

In-house uses: 0

Return to Search Save Add Call Number Add Item Close

If your school does not have a copy already, click "Add Call Number."

If your school already has a copy of this book, click on "Add Item" to add another copy to your school's collection.

## a) Adding Call

If you choose "Add Call," you will get a pop up window that shows you are indeed adding the resource to your own school. This is why you set the properties to your school first thing!

(If you are adding a multiple copy to your school, skip now to the "Adding Item" instructions.)

The screenshot displays the 'Call Number and Item Maintenance' window in the SirsiDynix Symphony WorkFlows application. The window is titled 'Call Number and Item Maintenance' and has a menu bar with 'File', 'Edit', 'Wizards', 'Helpers', 'Modules', 'Preference', 'Tools', 'Window', and 'Help'. The main area is divided into several sections:

- Control**: Contains a list of call numbers and item IDs, such as '32233025995043 - 1 - BOOK' and '636.7 WAH - 2\_GOSFIELD'.
- Bibliographic**: Contains a list of call numbers and item IDs, such as '32233025488866 - 1 - BOOK' and '636.7 WAH - 2\_HARROWJP'.
- Call Number/Item**: Contains a list of call numbers and item IDs, such as '32233020716130 - 1 - BOOK' and '636.7 WAH - 2\_HARROWSP'.
- Bound-with**: Contains a list of call numbers and item IDs, such as '32233019541069 - 1 - BOOK' and '636.7 WAH - 2\_KINGS-PS'.

The 'Call Number/Item' section is currently selected, and the 'Item ID' field is set to '32233025995043'. The 'Copy number' field is set to '1'. The 'Library for new call number' dropdown menu is set to '2\_KINGS-PS'. A red callout box points to this dropdown menu with the text: "Because you set your properties earlier, your library will pop up in the box. This allows you to make sure you are indeed adding a copy to your OWN school. Click 'OK.'"

The 'Item information' section contains the following fields:

- Item ID: 32233025995043
- Copy number: 1
- Library: 2 ANDERDON
- Shelving key: 636.7 WAH
- Shadow call number: N
- Item information: 2\_KINGS-PS
- Item ID: 32233026014539
- Copy number: 1
- Library: 2 ANDERDON
- Shelving key: 636.7 WAH
- Shadow call number: N
- Item information: NONFICTION
- Item ID: 32233026014539
- Copy number: 1
- Library: 2 ANDERDON
- Shelving key: 636.7 WAH
- Shadow call number: N
- Item information: NONFICTION

The 'Total charges' section contains the following fields:

- Total charges: 1
- Price: \$20.00
- Permanent:
- Shadow item:
- Circulate:

The 'Extended information' section contains the following fields:

- Tag: CIRCNOTE, PUBLIC, STAFF
- Contents:

The 'Date created' section contains the following fields:

- Date created: 10/5/2009
- Date last charged: 11/10/2009
- Date due: none
- Last discharged: 11/12/2009,10:43
- Date inventoried: Never
- Times inventoried: 0
- Last activity: 11/12/2009
- In-house uses: 0

The bottom of the window contains the following buttons: 'Return to Search', 'Save', 'Add Call Number', 'Add Item', and 'Close'.

When you click "OK" to your own school, you will see that your new record has already begun! The defaults of "Book...On Shelf" are still in place, however. You will need to change these now.

Call Number and Item M

Don't lick the dog : r

Control Bibliographic

Call number information

Call number: 636.7 WAH Class scheme: DEWEY

Call library: 2 KINGS-PS Shelving key: 636.7 WAH

Shadow call number

Item information

Item ID: Copy number: 1

Type: BOOK Item library: 2 KINGS-PS

Home location: ON-SHELF Current location: ON-SHELF

Item cat1: Item cat2:

Media desk: Number of pieces: 1

Total charges: 0 Price: \$0.00

Permanent:  Circulate:

Shadow item

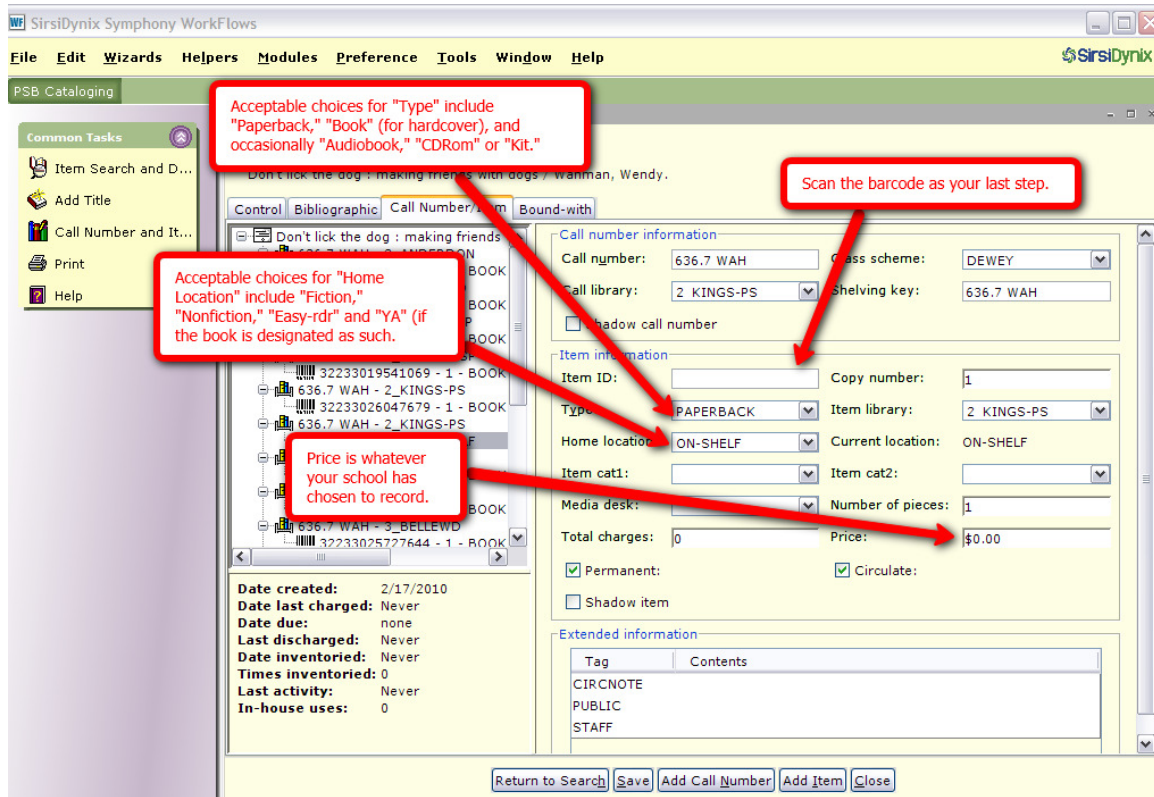
Extended information

Tag	Contents
CIRCNOTE	
PUBLIC	
STAFF	

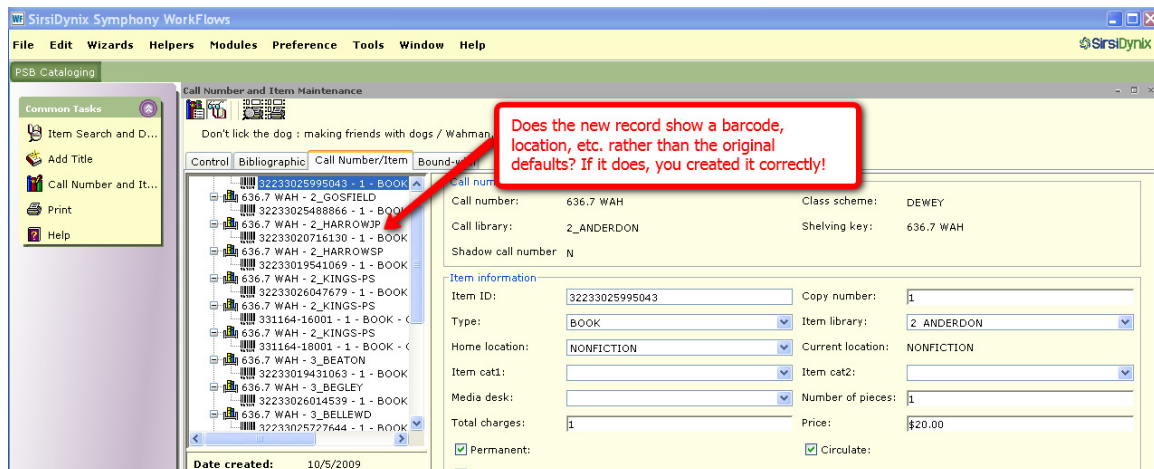
Date created: 2/17/2010  
Date last charged: Never  
Date due: none  
Last discharged: Never  
Date inventoried: Never  
Times inventoried: 0  
Last activity: Never  
In-house uses: 0

Return to Search Save Add Call Number Add Item Close

This "magic screen" appears in all three kinds of cataloguing at some point ("Add Call," "Add Item" and "Create Brief"). The same four defaults always have to be changed in each record: price, home location, type, and finally, the barcode.



Once you've put in the correct information for each of the four windows that require changing, check the record you initially started in that "Call Number/Item" list of schools. Does your new record show the corrected defaults? Is it really under your school?



Finish off the record by saving it using the "Save" button at the bottom. Want one more chance to check it first? Use the "Close" button at the bottom before hitting "Save."

Common Tasks

- Item Search and D...
- Add Title
- Call Number and It...
- Print
- Help

Number and Item Maintenance

Don't lick the dog : making friends with dogs / Wahman, Wendy.

Control Bibliographic Call Number/Item Bound-with

Call number information

Call number: 636.7 WAH Class scheme: DEWEY

Call library: 2 KINGS-PS Shelving key: 636.7 WAH

Shadow call number

Item information

Item ID: 32233..... Copy number: 1

Type: PAPERBACK Item library: 2 KINGS-PS

Home location: NONFICTION Current location: ON-SHELF

Item cat1: Item cat2:

Media desk: Number of pieces: 1

Total charges: Price: \$20.00

Permanent:  Circulate:

Shadow item

ended information

Tag Contents

IRRCNOTE

PUBLIC

STAFF

Date of creation: Never

Date of last activity: Never

Last activity: Never

In-house uses: 0

Return to Search Save Add Call Number Add Item Close

## **b) Adding Item**

If your school appeared in the list on the initial search record, your collection already must have at least one copy of the resource. You should have selected the "Add Item" button at the bottom of that "Call Number and Item Maintenance" screen.

You are ready to add a subsequent copy to your collection.

Click on a copy of the book from your school's collection in that "Call Number/Item" list of schools. Then click on "Add Item" at the bottom of the screen.

The screenshot displays the 'Call Number and Item Maintenance' window in SirsiDynix Symphony WorkFlows. The window title is 'Twilight / Meyer, Stephenie, 1973-'. The interface is divided into several sections:

- Control**: Includes 'Bibliographic' and 'Call Number' tabs.
- Call Number List**: A list of call numbers with their respective quantities and formats. One call number is highlighted.
- Item Information**: A form with the following fields:
  - Item ID: 32233025224204
  - Copy number: 1
  - Type: PAPERBACK
  - Item library: 2 AMBURG
  - Home location: YA
  - Current location: YA
  - Item cat1: (empty)
  - Item cat2: (empty)
  - Media desk: (empty)
  - Number of pieces: 1
  - Price: \$5.00
  - Total charges: 0
  - Checkboxes:  Permanent,  Circulate,  Shadow item
- Extended information**: A table with columns 'Tag' and 'Content'. The content includes 'CIRCNOTE', 'PUBLIC', and 'STAFF'.
- Buttons**: 'Return to Search', 'Save', 'Add Call Number', 'Add Item', and 'Close'.

Just as with "Add Call," you get the new record started, and you have four properties to correct for the record. Finish with Close/Save.

When you click on the "Add Item" button, it takes you to this screen, and a new generic record begins for the new copy. Java Client figures out what the most recent copy's number should be, and will fill in a blank if you've lost a copy previously.

Once again, select the correct defaults for these four areas.

Then finish with Close/Save.

Return to Search Save Add Call Number Add Item Close



## c) Adding Title

If your search for a resource results in no record being found, you are the first school to have the item. You must perform searches by title, by author, and by series before you can assume the book isn't in the system.

Watch for the phrase "No keywords found. Browse" as evidence that your search is not finding success.

If the record indeed doesn't exist, you will have to "Add Title" in order to create a "brief record."

The screenshot shows the SirsiDynix PSB Cataloging interface. The search bar contains "Liz Golden wins the race" and the index is set to "Title". The search results show "No keywords found. BROWSE Title Liz Golden wins the race, ALL". The left sidebar has a "Common Tasks" menu with "Add Title" highlighted. Three red callout boxes provide instructions:

- Top-left: "If you're searching for a resource, you must look for it by title, by author and by series before you can assume it is not in the system."
- Top-right: "If you get the message 'no keywords found' and you've done all of those searches, you can safely assume you need to create a 'Brief Record' for that resource."
- Bottom-left: "Click on the 'Add Title' option to create a brief record. (This record will show up with call numbers of XX until Liz Geier completes the record. You may NOT link your resources to XX records!)"

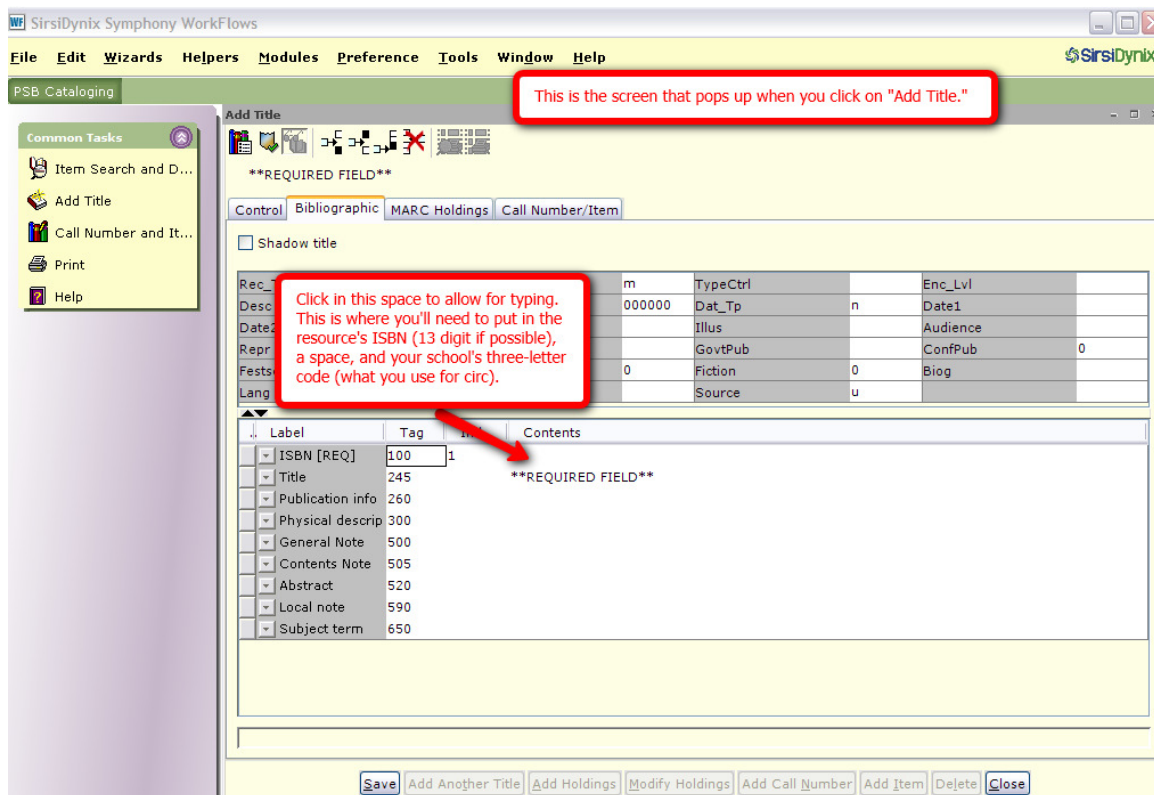
The interface also displays a list of titles and a fixed field data section:

Title	Heading Occurrenc...
Liz :	1
Liz looks for a home	1
Liz makes a rainbow	1
	1
	1
	1

Fixed field data 000000n 000 0 eng u  
Personal Author [West, Tracey](#)  
Title [Liz looks for a home](#)  
Series Title [\(Scholastic's The Magic School Bus\)](#)  
Abstract When Ralphia takes Liz home for the weekend, something's wrong! He forgot Liz's habitat! What place is best for Liz? A nest? A pond?  
Subject term [REPTILES](#)  
Held by [2\\_ANDERDON 2\\_LASALLE 2\\_HARROWJP 2\\_HARROWSP 2\\_JACKMINE 2\\_PRANDREW 3\\_MCCALLUM 3\\_ROSELAND](#)

Click on the "Add Title" phrase in the Cataloguing taskbar.

This screen appears:



Brief records are just that...brief. Only the first two windows of the Bibliographic Screen are used. Liz Geier fills in the rest when the record is completed. Until it is completed, the call numbers of a brief record show up as XX.

The "100 Field" is where you type **only two** things:

1. The **ISBN** (preferably the longer, newer, 13-digit one, which usually starts with 978). Leave a space after it.
2. The **three letter code** for your library that is found in your circ login (e.g. lascirc would be las)

The "245 Field" is where you include the other pertinent data Liz Geier requires. She does not look at any of the other fields, so do not put information into them!

The format for the 245 Field is this:

Title (author's name [last, first], series [if there is one – as well as number in series], publisher, date of publication)

e.g. Harry Potter and the sorcerer's stone (Rowling, JK, Harry Potter #1, Bloomsbury, 1997)

The screenshot shows the 'Add Title' window in SirsiDynix Symphony WorkFlows. The window has a menu bar (File, Edit, Wizards, Helpers, Modules, Preference, Tools, Window, Help) and a toolbar. The 'Bibliographic' tab is active, showing a table of fields and a list of tags. A red box highlights the 245 tag field, which contains '\*\*REQUIRED FIELD\*\*'. Another red box points to the 'Close' button at the bottom right. A third red box points to the 'Save' button at the bottom left.

**Table 1: Field Data**

Field	Value
Rec_Type	a
Bib_Lvl	m
TypeCtrl	
Enc_Lvl	
Desc	Entrd 000000
Dat_Tp	n
Date1	
Date2	Ctry
Audience	
Repr	Cont
GovtPub	
ConfPub	0
Festschr	0
Indx	0
Fiction	0
Biog	
eng	Mod_Rec
Source	u

**Table 2: Tag List**

Tag	Ind.	Contents
100	1	978423423423 kps
245		**REQUIRED FIELD**
260		Publication info
300		Physical descrip
500		General Note
505		Contents Note
520		Abstract
590		Local note
650		Subject term

**Annotations:**

- Red Box 1:** In the 245 slot, you need to put, in this order: Title (Author, Series if given, Publisher, Copyright Date.) You may also want to include "graphic novel" or "manga."
- Red Box 2:** "Close" gives you one last chance to be sure you haven't made any errors. Click on "Save" when you are sure you're good to go!

When you click on "Save" you are once again transported to the screen with the four defaults that require changing:

Once again you get to the screen with the four defaults that require changing. This time, however, the record shows a call number of XX.

Call library: 2 ADMIN

Shelving key: XX(335589.1)

Class scheme: DEWEY

Item ID: [ ] Copy number: 1

Type: BOOK Item library: 2 ADMIN

Home location: ON-SHELF Current location: ON-SHELF

Item cat1: UNIONCAT Item cat2: [ ]

Media desk: [ ] Number of faces: 1

Total charges: 0 Price: \$0.00

Permanent  Circulate

Shadow item

Tag	Contents
CIRCNOTE	
PUBLIC	
STAFF	

Save Add Another Title Add Holdings Modify Holdings Add Call Number Add Item Delete Close

Complete the four defaults, watch your record in the "Call Number/Item" tab update to show the barcode, and then Close (if you want a last chance to check for accuracy) or Save (to complete the record.)

## **GENERAL TIPS:**

- Once you have saved the brief record, it goes off to Liz Geier to be finished. **Because Liz has hundreds of records to complete, the rule is no more than 25 brief records can be created by a school in one day.** We have our cataloguing password set to remind you of this rule.
- In the meantime, put the book aside until you have time to run the book through the system to see if the record has been completed. You'll know because the call number will no longer be an XX.
- If you realize you've made a mistake in your cataloguing, you should email your SATL and ask how to handle it. Some things can be fixed by you; some things need to be handled by Liz.
- In the meantime, put the book aside until you have time to run the book through the system to see if the record has been completed. You'll know because the call number will no longer be an XX.
- If you have not set your properties, you will be linking records to Admin or perhaps to other schools. Those records will be removed for the good of the system.
- Anyone can look at our records from the Internet (e.g. Webcat). It is our joint responsibility to ensure our records are accurate.