South Central Library System Follow up Questions

- Does Sirsi Dynix provide a Sandbox for training and testing?

Yes. We can provide a test system for both training and testing purposes.

- Were the Blue Cloud and Symphony web demonstrations performed on a live (production) version of the software or was it a testing/beta version?

The demo system used is equivalent to a live production environment, and all features demonstrated are available to the general public.

Cataloging

- In BlueCloud Cataloging, is it possible to create brief bib templates that are used for Cataloging (not fast adds)?
    - *Yes, templates can be as brief or robust as desired and may contain pre-filled fields if desired.*
    - Non-MARC cataloging library staff would use these to create brief bib records for new titles.
    - Is there an easy way to identify these brief records on a report for the MARC Cataloging staff?
        - *Yes, templates can be automatically assigned a specific item type or location to identify brief records in batch using reports.*
- What is taken into consideration when warnings are given for possible duplicate records (OCLC #, ISBN, title, author, etc.)?
    - *This is customizable depending on the match and load rules you set. It can include specific fields within the record based on Entry ID. Users can choose to match on the title control number, the title control number OR an indexed MARC tag, or the title control number AND an indexed MARC tag. Match and load also considers the library and format.*
- Are there any warnings when the very last item is deleted off of a bib record either on a single record or through batch deleting?
    - *There is no warning before deleting the last item associated off a bib record. However, due to Symphony's structure, even if the last item is deleted, the call number will remain and allow the user to generate a new item under that call number. The Title > Call Number > Item cascading structure essentially allows an intermediary step between the bib record and the item records.*
    - If staff are given the option to delete the bib record as well, can we set permissions so that the bib record is only deleted if the staff have permission to delete the bib record and staff are not given the option to delete the bib record?
        - *Yes, you can set permissions for this.*
- Are you able to suppress/hide records from the public catalog? How do these appear to staff?

    - *Yes, there is an option to Shadow records, which hides them from public view. Unless you choose otherwise, shadowed records are generally visible to staff with the indicator that they are shadowed.*
- Is it possible to search by multiple Collection Codes at the same time for a specific library?
    - *Yes, Symphony has an advanced search option allowing for filtering by multiple collection codes.*
- Which subfields are shown for 1XX and 7XX fields (on both staff and patron side)?
    - *All 1xx and 7xx fields are available all the time for staff. The fields that display for patrons can be chosen and controlled by the library*
- Do the different batch edit options handle non-alphanumeric data okay (such as putting + or ++ in a call number)?
    - *Yes, Data Control is able to accommodate non-alphanumeric data*
- Demonstrate what happens when bibs are merged (holds, circ, acquisitions, etc.).
    - Title level and Item level holds should be combined on kept bib and ordered by date and time placed
    - All bib level circulation statistics should be moved to the kept bib
    - All item level circuation statistics and transactions should move along with the items
    - All associated Acquisitions data should move along with the items
        - *Yes, all of these things will happen when bibs are merged. Demonstration: https://vimeo.com/991650633*

Serials

- SCLS created a shared publication pattern for Consumer Reports magazine - multiple libraries have subscriptions attached to the pub pattern. SCLS staff change 2024 Jun to 2024 Jun/Jul in the pub pattern as an ad hoc change. How do the libraries see this change cascade throughout their subscriptions, so they can correctly receive the issue as 2024 Jun/Jul instead of 2024 Jun?
    - *The System Administrator (or whoever sets the Control Records for a publication) can update the chronology pattern to reflect the combined issue, then generate new predictions. Or, when each library checks in the issue, they can use the "Combined Issue" button to receive it as a combined issue.*
    - What happens if one library already received 2024 Jun before the pub pattern change to 2024 Jun/Jul was made by system staff. How can that be resolved?
        - *After a Serial is received, the individual copy can be changed by staff without affecting the pub pattern.*
- Describe how multiple subscriptions for a single library are set up and how the issues are received. For example, a library may have 1 regular circulating copy of a magazine and 1 reference copy that does not circulate. How are these issues received?
    - *In a serial control record, you can create distribution rules that would indicate that one copy circulates and one copy does not. Then, when you receive a new issue, it would automatically follow those distribution rules upon check in.*
- What workflow would you recommend for deleting item records created via serials so that the issue is removed from the subscription, holdings summary, etc?

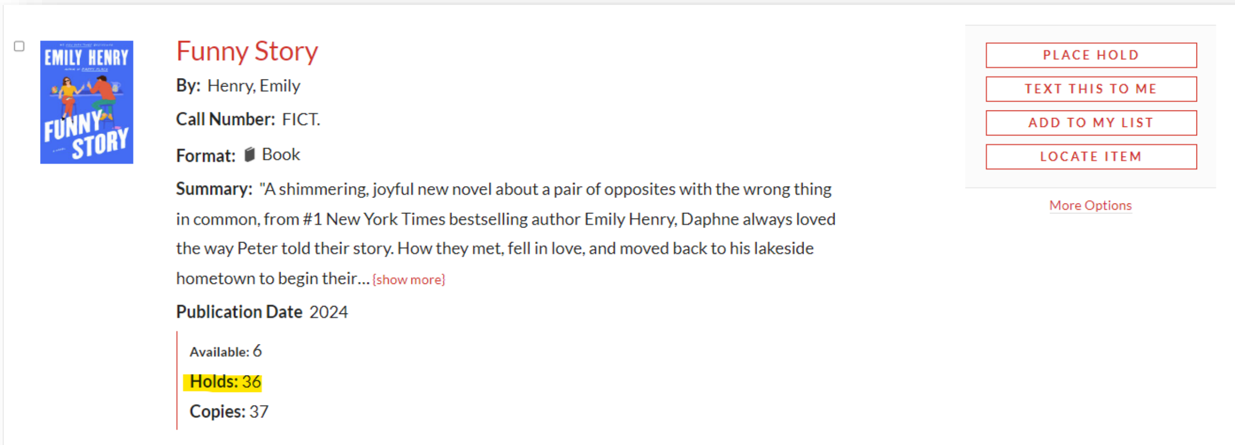
- For instance, if a library removes all of their 2022 items for a magazine, how does this affect their subscription/predictions?
    - *Removing holdings of a serial does not impact the current or future predictions.*
- Does the holdings summary displayed to library staff and patrons automatically update to remove issues that have been deleted from the catalog?
    - *Yes; In Symphony, the item holdings are immediately updated once an item is deleted. For patrons, the holdings would update in Enterprise when the next delta harvest happens at whatever frequency you have set.*

- Is it possible to set up these types of unique publication patterns without doing manual editing at the point of receipt?
    - TV Guide: lists 2 dates, no. goes up by 3 every issue (v.72 no.18 : 2024 Apr 22-May 12, v.73 no.21 : 2024 May 13-Jun 02)
        - *Yes*
    - Nature: v. goes up every month, no. goes up every issue (v.628 no.8009 : 2024 Apr 25, v.629 no.8010 : 2024 May 02)
        - *Yes*
    - The Cottage Journal: Spring, Summer, Autumn, Christmas, Winter (has later year on it, like this year's issue would be 2025 Winter not 2024)
        - *Yes*

Discovery Layer

- Can the system handle large checkout histories, for example patrons who have 10+ years of history with thousands of items checked out?
    - *Yes*
- Can we set a temporary location as a Display? For example if an item travels to a different branch for a special display, is there a way to show, temporarily, that the item is on display at a different location and when the display is over, staff can easily clear that and the item reverts to its owning location?
    - *Yes, this is a very common use of the Current Location status in Symphony. You could also use Item Categories to achieve this.*
- Can you show the following in the Discovery Layer for a bib record?
    - Total holds
    - # of active holds
    - # of suspended holds

- *Total holds can be displayed for a bib record; suspended holds are not included in the calculation of total holds. The way this displays in the Discovery layer can be customized. Example below.*
-



- Do you need to specifically set serials as item level holds? Or are serials item-level holds automatically due to the fact that they are serials?
  - *Serials can be item level holds if desired, and patrons can place item-level holds on serials.*
- Can the relevance ranking be customized or adjusted so exact title matches are first? For example, in some examples that we checked, we noticed that if you search ***The Help*** or ***It***, the books with these titles come up first, but the DVDs are further down in the list, after books with titles such as *God Help the Child* and *Roughing It*.
  - *Yes, relevance ranking can be adjusted and customized*
- What languages, other than English, are available for the Discovery Layer display?

The Add Language page lets you create a new language file based on an existing language file. Enterprise is fully compliant with Unicode, and is delivered with the following language files:

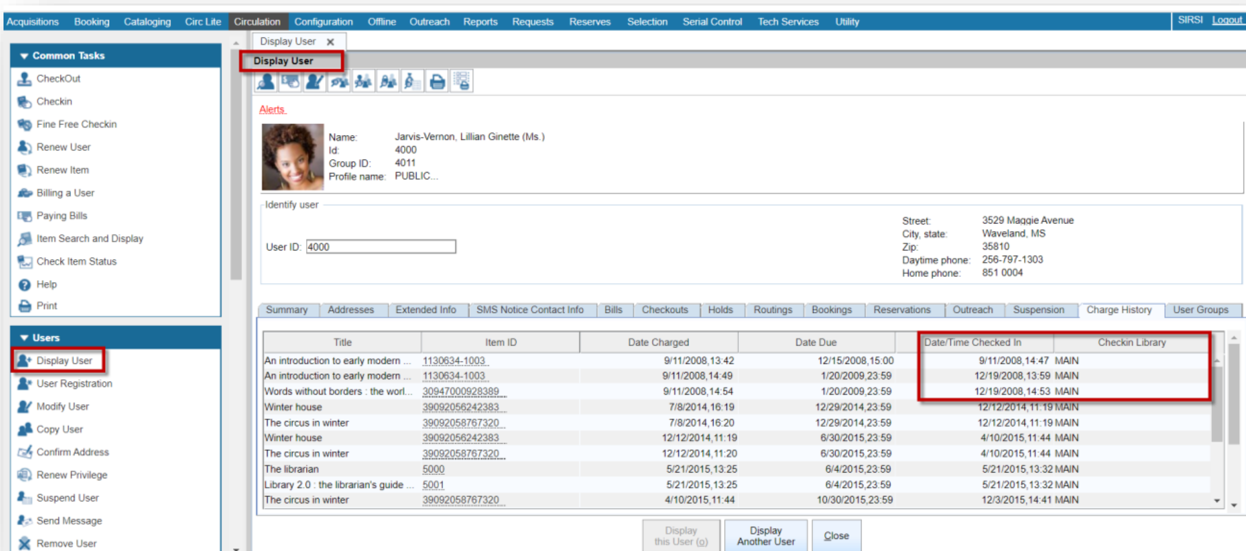
  - *United States English*
  - *Australian English*
  - *British English*
  - *French French*
  - *Canadian French*
  - *Spanish*
  - *Catalan*
  - *Colombian Spanish*
  - *Simplified Chinese*
  - *Traditional Chinese*
  - *Somali*

  A library can add any new language file they desire, providing the translations for existing strings.

- What are the options for displaying icons for different formats? Is it possible to tie the display to the 3xx fields? If not, where does the format information come from?
    - *You can configure whether or not format type icons appear in search results and in item detail displays. Format type icons are icons that signify the type of item (book, DVD, etc.) listed in the search results. They display as part of the item description and make it easier for patrons to quickly identify the type of item listed in their search results. The icons that display are determined by the item type defined in the item information. Configuration for format icons is done in the Admin side of Enterprise Discovery.*

Circulation

- #10 Can the set up for Fast Add records require automatic suppression from the catalog?
    - *Yes, Fast Add records can be shadowed by default.*
- #5 Does the system display the location and/or time stamp of a checked in item in the patron record? Or can you only access this in an Audit report?
    - *Yes, this is displayed in the patron Charge History if enabled.*

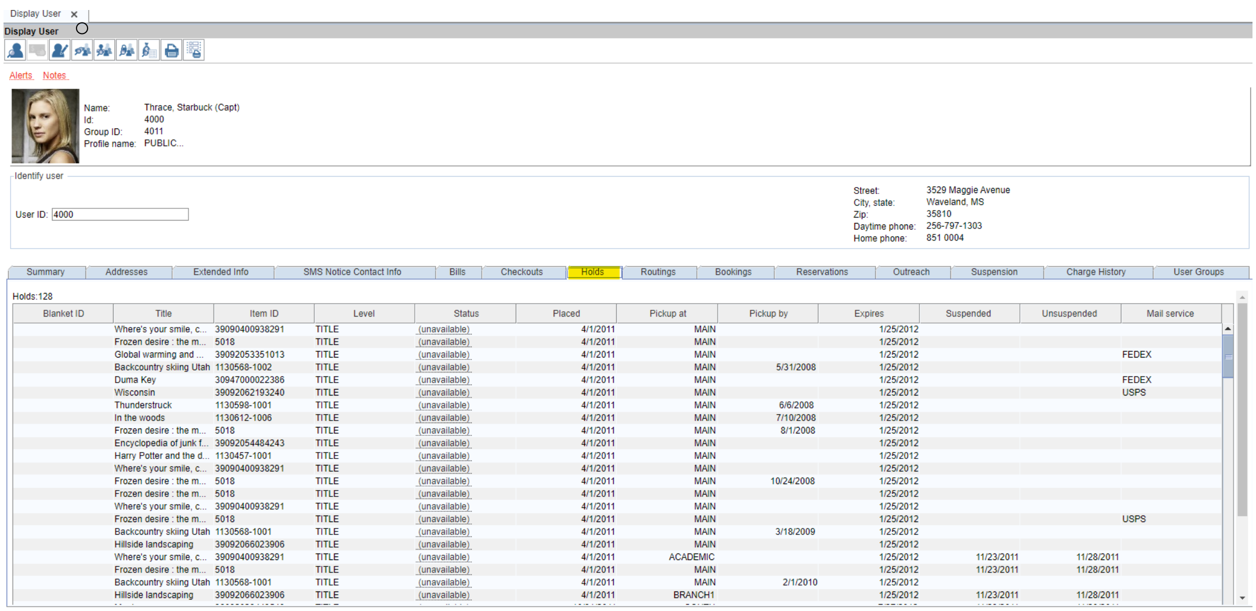


- #6 Demonstrate a situation where the circulation rules/policies charge overdue fines on returned Lost items
    - *Overdue fines on returned Lost items:* https://vimeo.com/990311874/cf41732f37?share=copy
- #9 Demonstrate a patron record that is accruing an amount of overdue fines, checkin the item using Book Drop and then show that the fines charges are reduced by one day (assuming that Book drop is a backdate to the previous date)
    - *In Symphony, Overdue charges are only assessed as an estimate before the item is checked in. The final amount due for overdue fines is not assessed until the item is checked in, so fines are not listed on the patron's record until the final amount is assessed. Backdating check-ins using the bookdrop mode will accurately assess fines to the date chosen:* [*https://vimeo.com/991719332*](https://vimeo.com/991719332)

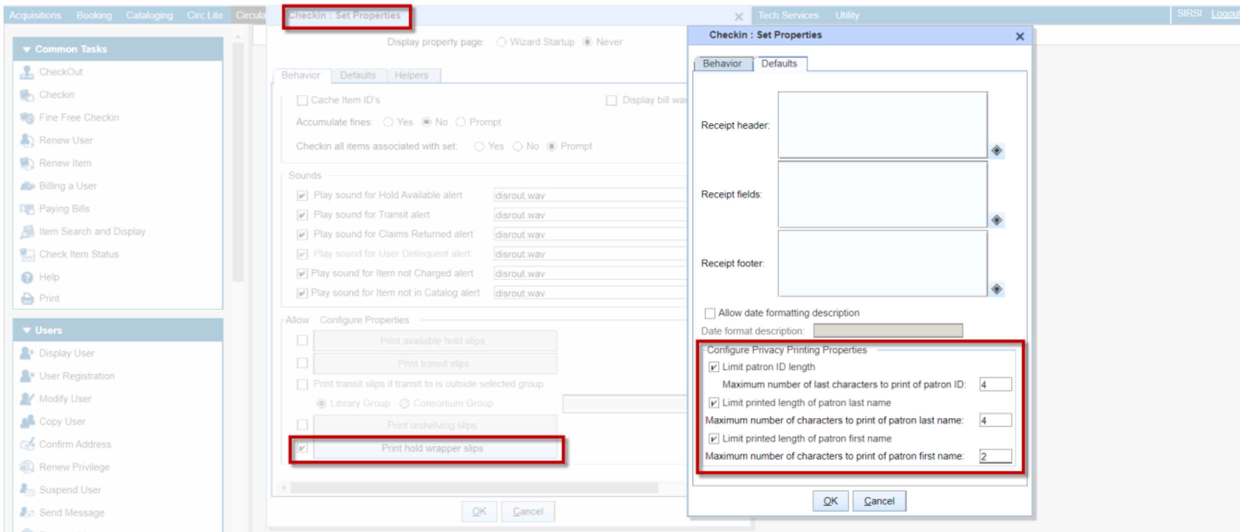
- #17 Do you have a Damaged check in option
    - *Not explicitly, but item notes can be added upon checkin to note damage.*
- #3 Can a note be added to a payment at the point of creating the payment?
    - *Yes*
- #8 Demonstrate waiving (crediting/paying at library's discretion) ALL charges (not accruing fines) on a patron's record and adding a Note to the Payment when creating of the payment.
    - *Waiving fines: https://vimeo.com/990311928*
    - *Adding a note: https://vimeo.com/990311908*
- If a library manually accepted a payment for a Lost item owned by another library, is there a way to track that payment other than placing a Note on the payment record indicating the payment is in transit to the owning library?
    - *This can be tracked through Cash Management reports*
- #10 Demonstrate payment of all Lost charges on a patron's record
    - *Lost charges are handled the same as all other charges on a patron record. To pay all Lost charges without paying other charges on the patron's record, each of those charges would be paid individually. Patrons can pay per bill or apply money to their bill total with the amount disturbed across bills.*
- 11 Demonstrate waiving part of a Lost charge and then applying payment to the remainder. (Library staff will use this workflow if the Replacement amount for a Lost item can be reduced due to a lower, new purchase price).
    - *Splitting Payments*: https://vimeo.com/990311900
- #12 Demonstrate Sirsi Dynix eCommerce functionality (through SIP). How is an online payment differentiated from other types of payments (cash, check, in-house credit card).
    - *Ecommerce does not make payments through SIP.*
    - *SirsiDynix utilizes BLUEcloud Commerce for online payments and credit card processing. BLUEcloud Commerce records all transactions in the ILS and BCC payments are differentiated in the system by the payment type. Transaction history for BCC is recorded in BLUEcloud Central.*
- #13 Is there a setting that would prevent partial payments of Lost items?
    - *No*
- #17 Brands of POS or cash register vendors were displayed. Please demonstrate the functionality if possible.
    - *We are not able to demonstrate the functionality of all possible hardware vendors. If South Central provides a list of hardware in use, we can confirm compatibility*.
- Demonstrate settings that allow each Owning library to decide whether (or not) a refund will be generated when one of their items, that has gone to lost and been paid for by a patron, has been returned and checked in. OR an Automatic message that, upon check-in of a lost/paid/found item, indicates that the owning library does not give refunds
    - *Generally, if you have some libraries that offer refunds and some that do not, this will be achievable and automated via Symphony policies.*

      In this case, the Default Price Policies and Default Price Map can map out specific combinations of library and item type that will result in behaviors relating to automatic refunds via patron credit accounts, assessment of price for lost materials, automatic *removals of processing fees associated with lost materials (if assessed) and whether or not to deduct any overdue finds from a refund for paid lost materials that are returned to the library.*

- #7 If we set up a Claims Returned status, can that be set to "temporarily' credit the Lost charge?
    - *The Claims Returned function in Symphony does not credit Lost charges.*
- #10 Demonstrate that a Resume on Date can only be set for a future date.
    - *Suspend Hold Past Date Error: https://vimeo.com/991727960*
- #13 Demonstrate extending the expiration date of an item on the holds shelf by 2 or 3 days.
    - *Extend Hold Shelf Item Expiration*: https://vimeo.com/991729280
- #14-17 Demonstrate where a patron's hold history (holds filled, expired and canceled) is retained (tab or report).
    - *This is retained in the Holds tab of the patron record. Holds can be filtered by owning library, pickup library, placed-at library, and type of hold (inactive, expired, all, etc)*

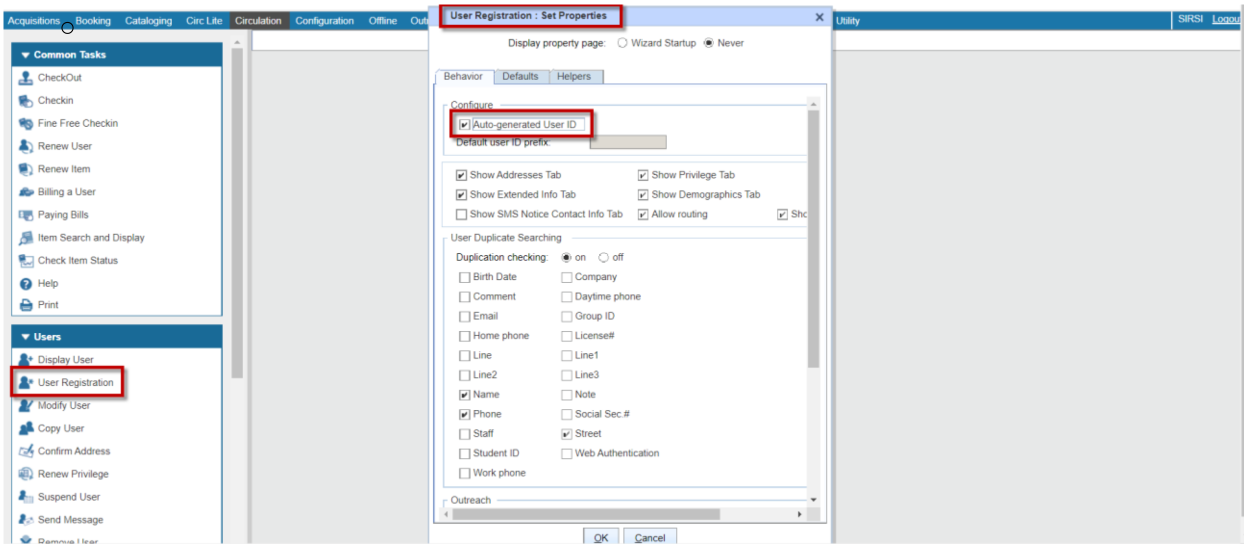


- #22 When a member of a User Group checks out a hold waiting for another member of the User Group, to which record is the checkout attributed? And is the hold considered filled?
    - *In User Group settings, you can indicate how checkouts are reflected using Responsibility Type, so all checkouts for group members could appear in the Parent account if you choose.*
    - *Yes, the hold is considered filled if it is picked up by someone within the User Group*
- #16 Can you demonstrate how we can truncate the patron name and/or the patron barcode (ID) on a hold slip?
    - *Using Behavior properties, libraries can customize what information prints on a hold wrapper, and how the text is to appear (horizontally, vertically, font, and font size). Since the information printed on the hold wrapper is visible to all patrons browsing the Holds shelf, the library can limit the number of characters that are printed for the user ID and /or user's name to protect the patron's privacy. (See screenshot below.)*

- 

- #18 If there is a hold request on the pick list for an item and another staff person in the library modifies the item status to Missing or Damaged or any non-Available status, does the system automatically remove the hold request from the report or does it have to be done manually?
    - *You can create a custom report to identify items with unavailable statuses which have holds, but you need to manually remove the holds from those items.*
- # 19 Is item level substitution available when filling title-level holds from the pick list (if library owns for that one copy of an item on the same BIB record)?
    - *Yes, staff can substitute one item for another under the same bib record to fulfill a hold. If the system automatically fills the hold with Copy 1 but the librarian finds Copy 2 first, it Copy 2 can be used to fulfill the user's hold.*
- If a patron has a hold on a BIB record and the hold request is on the pick list at Library A, will the patron's hold be filled by a walk-in check out of a different item on the same bibliographic record at Library B?
    - *No, it would not fulfill the hold.*
- If we set up a Local Holds system (item type, hold policy, custom status) in your software, confirm that the hold policy of "home" or "Local" would apply to all branches of a multi-branch library.
    - *We need more information to fully understand the question, but generally, policies can be applied by individual library, or by group (such as all branches of a multi-branch library), or system-wide.*
- #5 Demonstrate that the Birthdate field will not allow manual entry of a future date.
    - *The birthdate field will allow the entry of a future date. However, this is easily findable and correctible by running an audit in Symphony Data Control for future birthdates*.
- #6 Show patron barcode entry by significant digits (not including local barcode prefix).
    - *If custom Barcode Validation is configured on the system, and the default barcode prefix for user and item IDs is configured in the Barcode Validation Settings wizard, you can enter just the significant digits of the user and item IDs or barcodes.*
    - *Once you have defined the prefix for user and item IDs, the prefix will display in the User ID and Item ID fields in circulation wizards.*
    - *For example, if the prefix for user ID is set to 1888800 for the barcode 18888001431302, you may enter only the significant portion of the ID to retrieve the user 143130.*

- #11 If we choose to continue to use a Borrower number as the primary ID, can that be set-up to auto-generate for new patron records?
    - *Yes, the Borrower number/barcode can be auto-generated by default or by typing AUTO into the field*



- #21 Can a single member of a Family Group pay for all charges for the entire group in one transaction? Or do they need to pay per borrower? (we saw one member's charges paid, not all).
    - *Yes; if privileges allow, a single user in the Group can pay the bills for others in the group using the Pay User Group Bills helper. Group privileges can be set to allow, for example, a parent to pay for their child's bills but not vice versa, or for spouses to pay for each other's bills. There are numerous Group configurations to allow for different relationship structures.*
- #2 Demonstrate how to merge two existing, duplicate records.
    - *Merging user records is not currently available in Symphony but is on the road map for future development.*
- Can Internal Staff notes on a patron record have a location/date stamp (eg. REE 06/26/2024)
    - *They don't have a date stamp by default, but the date can be added manually in the notes field*
- Can any of the note fields be saved or archived to prevent accidental removal by other library locations or staff? (Alyssa/REE
    - *Notes cannot be saved or archived, however they are retained in the History Logs, and could be referenced if a note was deleted accidentally.*
- How are "Lost" cards flagged to prevent an unauthorized user to checkout with a stolen card? Is this a setting that could be added? (Alyssa/REE
    - *The User Lost Card wizard replaces a user's lost library card. The old User ID is deactivated. After the user is assigned a new library card, the lost card is deactivated and its user record assigned a User Profile Policy of LOSTCARD. If the lost card is found later, it cannot be used. When the Configure Checking previous ID when User ID is not Found option is enabled by the library in Global Configuration, a user may be found by his/her Previous ID when a User ID is scanned.*
- Are hold cancellation notices sent to patrons when a hold is deleted because the bib was deleted as part of a batch deletion of bibliographic records (for example when we batch delete bib records with no items

- *In the provided scenario, Symphony would not allow holds on a title with no items. More broadly, yes, there is a Notice for Cancelled Holds Report, which includes the scenario of the item being removed from Symphony. The Notice for Cancelled Holds report selects holds that have been set to INACTIVE because the item was cancelled by the user, removed in Symphony, or removed from the Holds shelf as long as the user has never been notified previously of a hold cancellation for that material.*

Acquisitions

For Acquisitions, we would like to schedule a follow-up webinar to review these questions and to see BlueCloud Acquisitions.

Display

- Could you demo the custom display options?
  - *Display options and defaults come primarily from Session Settings and the various properties for each wizard. For example, the option to display a single segment of an orderline or expanded segments in the order can be toggled on/off in Session Settings.*
- Is there any other way to make text larger other than zooming in the browser?
  - *Not within SymphonyWeb. The desktop client does have options to adjust font size.*

Funds

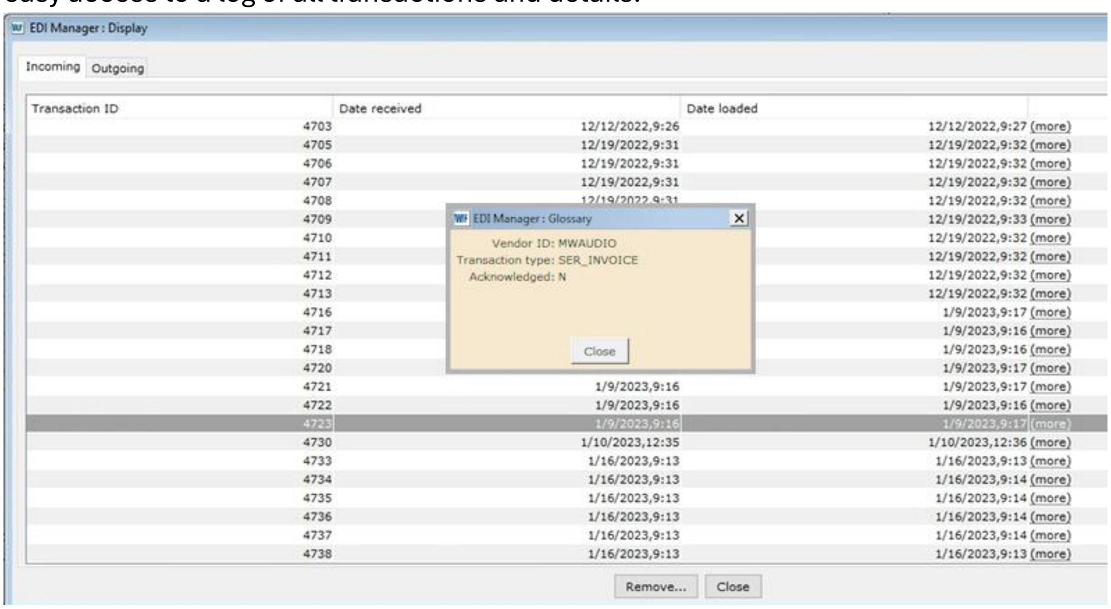
- Could you show more about building fund hierarchies, viewing fund hierarchies, and the parent/child fund structure?
  - *Each fund record contains six library defined fund level fields to allow hierarchical grouping of similar or related funds. Each fund level is independent of the other levels, but you can select categories for the levels that allow them to function hierarchically.*

    For example, one fund level may describe major fund categories such as GENERAL, DONATION or MISC. Another level can define a subordinate level in the funding, such as FICTION, NONFIC, etc. and so on for the remaining levels. All of the levels will appear in the drop down, so it is necessary to communicate the appropriate structure to staff.
- Could you show how to move a fund around in the hierarchy?
  - *Moving funds in the hierarchy is as easy as adjusting the various fund levels using the Modify Fund wizard according to the established hierarchy.*
- Could you include a before and after demo of the hierarchy after the fund is moved?
  - *As stated in the live demo, no change is made to the fund record after modifying fund levels, unless a budget transfer was also made. Any monetary modifications will be detailed in the fund audit trail.*

Orders

- We do not connect to other catalogs using Z39.50 to find MARC records. Also, most of our library staff cannot load records via OCLC.
- Could you demo populating the order information by loading a vendor MARC file into the order?
  - *Loading order records from a bib file is a three step process: Import/upload the file with acquisitions data into Symphony, load the bib file with the Load Bibs with Order Info report (demonstrated in live demo), load order records with the Load Flat Order report.*

- Instead of using SmartPort, could you demo create a bib record using the data from the ACQ order record?
    - *Acquisitions data from the 9XX entries is only used when bib records are loaded using the load reports.*
      However, order records can be manually added without title data by "skipping" item lookup, in which case the Change Title Link helper can be used at a later time to link a bib record to the order.
- Could you demo a Closed PO with both received/invoiced items and cancelled items?
    - [Received Order with received lines and cancelled line]
- Could you demo navigating between Acquisitions and attached bibliographic records?
    - The "current" shortcut can be used to quickly navigate between the Acquisitions and Cataloging modules. In addition, helpers within tools can be used in conjunction with current to quickly navigate between modules without switching toolbars and while maintaining the current record.
- Could you show us the different stages of EDI - how can we see that an order has been sent via EDI, but not Acknowledged yet, and then how do we see that an order has been Acknowledged?
    - The EDI File Manager utility in SymphonyWeb keeps track of transactions sent and the functional response received after the vendor acknowledges the receipt of the sent transaction.
      The Incoming and Outgoing tabs display each X12 transaction, along with invoices, purchase orders, claims and claim responses.
      This information is also available in finished report logs, but the utility will provide easy access to a log of all transactions and details.



Receiving

- Could you show how a default order workslip will print?
    - *Workslip printing behavior can be controlled in receive wizard properties. As demonstrated, workslips can print automatically following receipt of an order and*

will print with any extended information (notes) from the order. No further customization is allowed.

- Could you demo how to customize the order workslip, specifically with adding fields for custom notes, and then how that customized workslip will print with the custom notes?
    - *See above.*

Invoices and Credit Memos

- Could you demo creating a miscellaneous invoice that is not attached to an order?
    - *Properties for Add Invoice can be used to adjust invoice line links. Invoice Link Types are used to link invoice lines to other acquisitions records, such as credit memo adjustments, fund links or tax or rebate adjustments.*
      Invoices can be created that are not linked to an order using link types other than order, with linking occurring at another time individually or in batch.
- Could you demo creating a miscellaneous credit member that is not attached to an order?
    - *As demonstrated, an invoice line with the adjust link type can be added to an invoice to add credit memos.*
- Could you demo the fund expenditure changes (before and after fund view) that occur when an Invoice is reversed?
    - For example, fund expenditure was $20, Invoice reversed was $5, now fund expenditure is $15. Free balance increased by $5.
      Reversing Payment of Invoice, with Fund adjustment
- Could you demo the fund expenditure changes (before and after view) that occur when a Credit memo is created?
    - For example, fund expenditure was $15, credit memo was $5, now fund expenditure is $10. Free balance increased by $5.
    - Credit Memo Invoice Adjustment

Deleting

- Deleting/archiving Vendors
    - Can you delete or archive Vendors that have been used in the past but are no longer in use?
    - For example, the Vendor would have completed orders from past years, but a library no longer has any open or current orders with the Vendor. Can the library delete or otherwise archive the Vendor?
    - *As discussed, Vendor and Fund Records can be marked to disallow use. This action effectively archives vendors without removing record details, which the library may with to retain.*
      In addition, only vendors not attached to orders and invoices are eligible to be deleted, even if the order is "complete." Orders and invoices must be deleted first.
- Deleting/archiving Funds
    - Could you confirm that if you used a fund to order and invoice in past fiscal years, but that all orders and invoices were completed and closed, and there are no open orders and invoices attached to the fund in the current fiscal year, that you can delete the fund?

- Could you demonstrate this?
- Does the fund information still display in the past orders and invoices?
- *Similar to vendors, funds cannot be removed if orders or invoices are attached. For both vendors and funds, the "block ordering/paying" flag can be set, making either unusable.*

Other

- Is there a limit to the number of logins that a library can have?
  - *No*
- Could you show a before and after view of a data purge?
  - *Deleting records, if allowed, will remove the record entirely. The record is no longer available and does not display in any search results. At the point of deletion, the only information retained is that information that has been recorded in Symphony logs.*
- Could you demo how staff would place a hold on a bib record with only on order items attached? Could you also show how patrons would do this?
  - *As demonstrated, staff and patrons can place holds against on-order titles by making use of the on-order call number record – no item record required.*