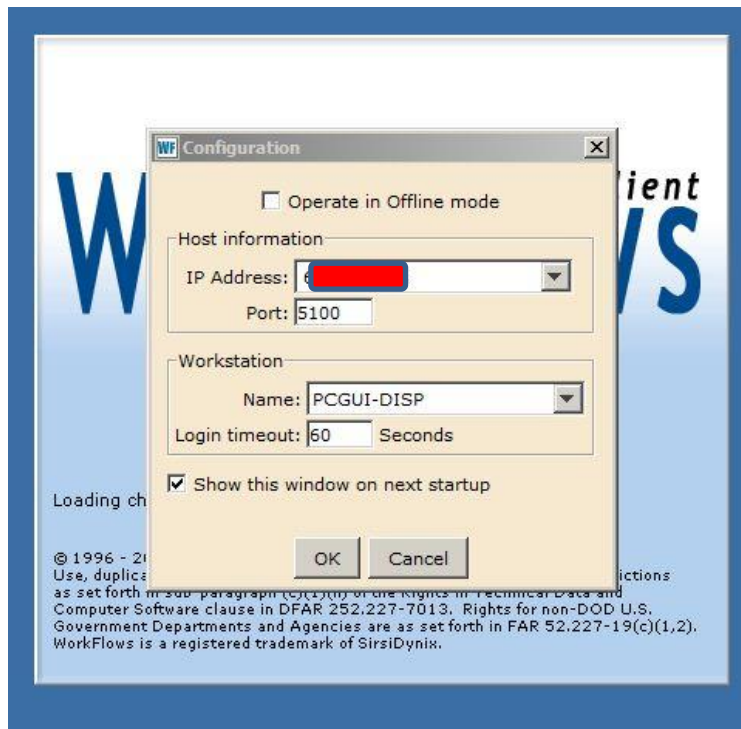## 2. SYMPHONY ESSENTIAL SKILLS

2.1 LOGIN

The Symphony library staff client software is built using conventions found in Microsoft Windows and other graphical operating systems. Most RCLS member library employees have Windows experience from working with web browsers, the SmarterMail email interface, or office programs. The recommended minimum skills are:

- Starting a Windows application from the desktop icon with a double-left click.

- Using a mouse or keyboard shortcuts to select menus options and buttons; opening drop-down menus.

- Work with multiple windows: move around on screen, minimize, maximize, restore, resize, close; use scroll bars to move up and down screens.

- Work with dialog boxes (boxes that ask you to save files, respond to choices, etc.)

- Closing a Windows application. Shutdown and restart of Windows.

To start Workflows, do a left double-click with the mouse while positioning the cursor over the Workflows icon on the Windows desktop. You can also start Workflows by clicking on the Windows "Start" button->All Programs->SirsiDynix->Workflows:

Once you click on the Workflows icon on the desktop you'll see a screen with the Workflows connection login:

Two elements of this login screen will already be filled in for you: the Host information and the Workstation information. The Host information does not need to be adjusted. [Note: There is a separate Symphony training database on a separate IP address. To access that training system, you would change the IP if you wanted to use the Symphony training database instead of the real database.]

The Workstation information will only need to be changed once for libraries that have a need to track monies collected at a particular workstation. For instance, in place of PCGUI-DISP above, at Middletown Thrall Library they may the circ desk workstations as MID101, MID102, etc., if they want to track monies collected.

Note that the "Operate in Offline Mode" checkbox is NOT checked as the default. Offline Mode is used when the network connection to the Symphony server at RCLS is not available. (It is equivalent to the separate PC Reliance program used when access to the Horizon server at RCLS was unavailable).

Also note that the "Show this window on next startup" box is checked by default. Since the information you see on this connection

configuration login screen will not change 99% of the time, it may seem like a good idea to skip its display. However, doing so will make getting to the Offline Mode a bit confusing, so we recommend leaving that default box checked.
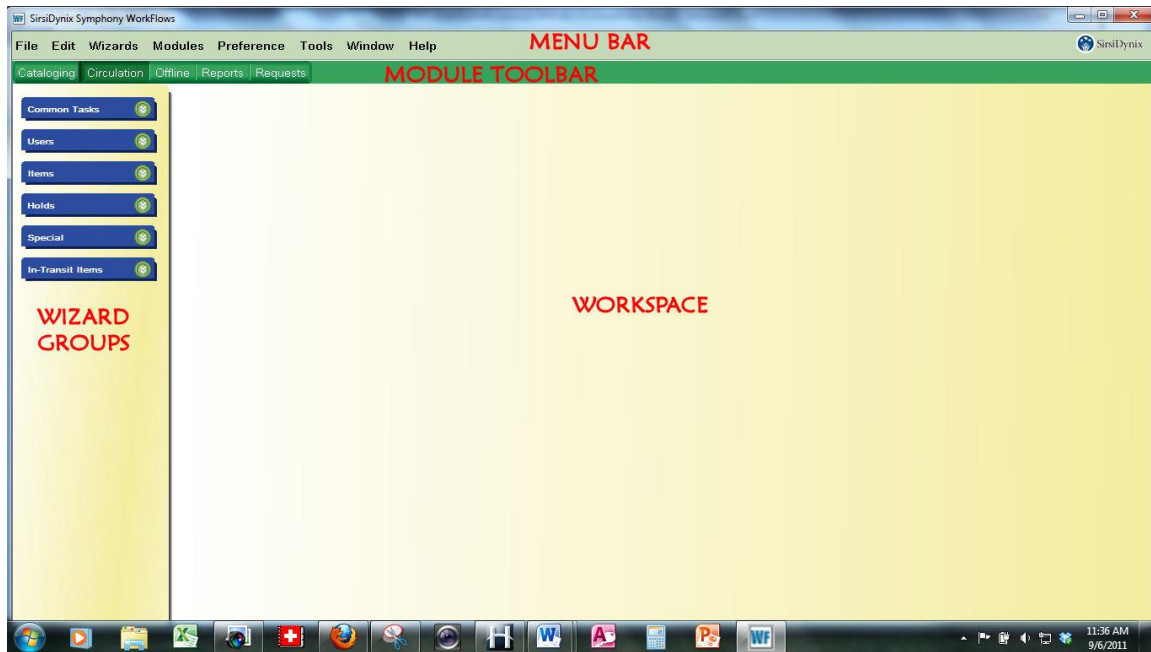
Click on OK to get to the User login screen:

Each library has its own set of generic logins: xxxCIRC (for circulation, technical services, reference, and children's staff); xxxANSER (for library directors and ANSER contacts); and xxxACQ (for technical services staff at libraries using the Acquisitions module.)

Enter both the user name and password in the appropriate boxes (case does not matter).

When you log in to start a session, an intense amount of data is being transferred between your client Windows machine and the Symphony server at RCLS. It will take Workflows between 10 and 15 seconds to start up.

2.2 THE WORKFLOWS INTERFACE

Once you have logged in to Workflows, you'll see the interface where all your automated library functions are performed. The plain Workflows workspace looks like this:

The menu bar displays at the top of Workflows. The options listed across the Menu bar will change, depending on what process (wizard) you are using within Workflows. The options listed each have their own drop-down menu. For instance, if you log in and have no Workflows wizards open, the Menu Bar has these options:
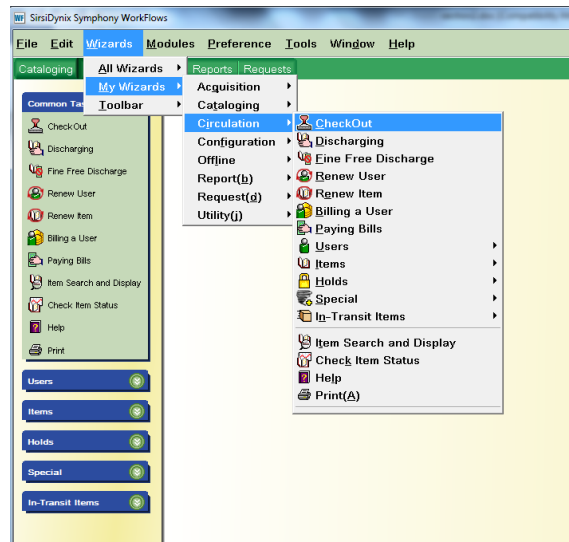

If you have a Symphony routine ("wizard") open, however, the Menu Bar displays an additional option (Helpers):

The Menu Bar can be navigated using the mouse by pointing and single-clicking. It can also be navigated using the keyboard: tap the ALT key, and each option on the Menu Bar will suddenly have one letter underlined. Typing one of those letters will open the drop-down

box of that option. Each option in the drop-down box will also have a letter underlined, so those choices can be selected.

Using the ALT key to select options from the Menu Bar Wizards and Helpers options is an alternative to using the mouse to select Wizards from the Wizard Groups (the Wizard Groups cannot be navigated using the keyboard alone).

- o File – Print options, Exit
- o Edit – Cut, Copy, Paste
- o Wizards – lists wizards as an alternative way to navigate to the Wizard Groups
- o Modules – indicates which module you are working in, alternative way to navigate to the Module toolbar
- o Preference –
  - Shows configuration information (first window seen before login),
  - Set Peripherals (scanners/printers),
  - Desktop options
    - Font Settings-don't go too big-(words go off the screen if font sized too big. Note that sizing the font won't change the size of some text labels in Workflows.)
    - Function Key Mapping-allows user to view and/or change which keys are shortcuts for Wizards. [See more on Function Keys below].
    - Desktop Setup
      - o Can select the theme for your interface

- o Can select multiple Windows mode, which allows multiple Wizards to stay open at a time.

Note that changing preferences will set those for that workstation, regardless of whether you log off and back on, even with a different login name.

- o Window-can change the mode in which multiple open wizards would be displayed: tile, cascade, horizontal and vertical-(can only use if multiple windows is selected)
- o Help – Primary source of information for each module. Provides immediate context-sensitive assistance, while you are working within Workflows
  - ▪ Five Help Choices:
    - • Contents-opens the Table of Contents-Broad search
    - • Context-opens context sensitive help-specific search for the wizard you are working in
      - o Index-search alphabetically
      - o Search-free-text search
        - ▪ Hyperlinks w/in lead to topics
        - ▪ When click print it sends to browser, thus making print larger and allowing print preview
    - • Session Info-displays how you are logged in and host information about the current Workflows session
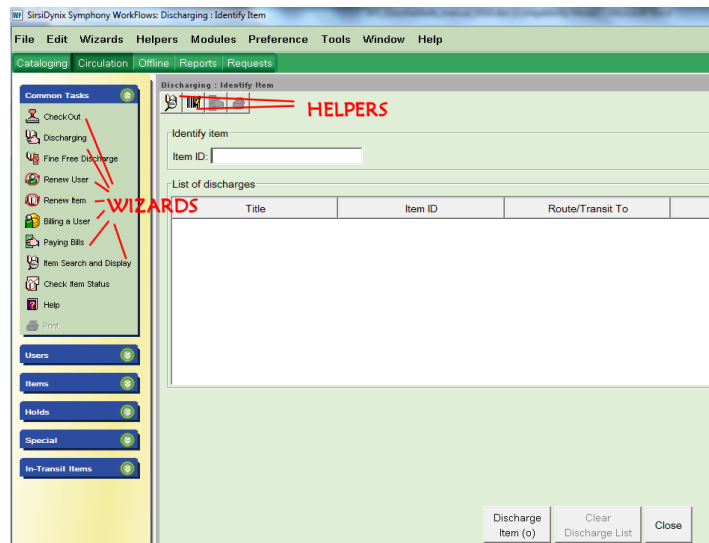   - • About-displays the software version and the SirsiDynix copyright statement

The line of text buttons that appears beneath the Menu Bar is called the Module Toolbar. It includes all the Symphony modules that your login has been given access to:
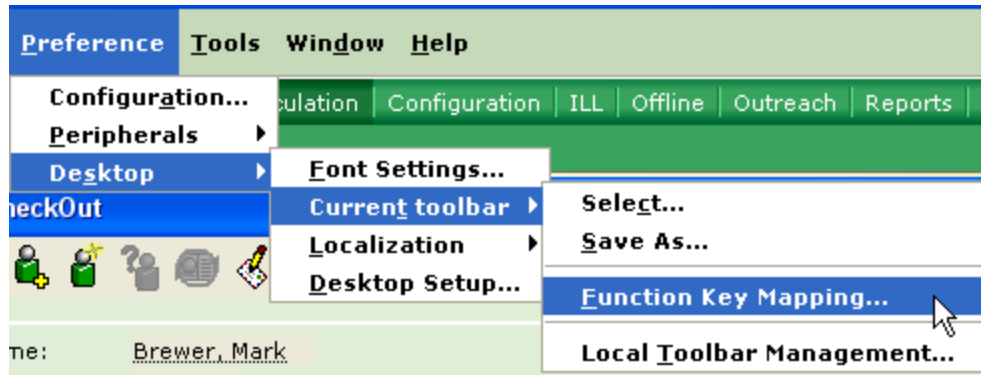
Cataloging | Circulation | Offline | Reports

- o The Module Toolbar across the top of the WorkFlows window changes the Wizard groups that appear on the left side of the window. The Module Toolbar can stay where it is or float, by clicking to far right of modules (in the toolbar) and dragging elsewhere in the WorkFlows client. Re-anchor by clicking the X.

Wizards and Helpers are tools used to conduct work within Symphony. Wizards are identified as labeled icons—the icon visually represents what the tool does, and the label describes the tool's function. A Helper is not labeled (but does display a balloon tooltip when you hover over the icon).

Each entry in a Wizard Group is a wizard. Helpers display at the top of an open wizard workspace in a Helper bar. A Helper is a wizard that has conveniently been placed inside of another wizard so that related workflows can be addressed from a single reference point. In the example below, the Discharging wizard has been opened, and within the Discharging workspace, two Helpers (Item Search and Change Item ID) automatically appeared.

Each WorkFlows module (Circulation, Cataloging, etc.) has function keys (F1, F2, etc) or function key combinations (function key plus SHIFT and/or ALT) mapped to certain wizards. You can view a list of these mappings by going to the menu bar and selecting Preference—Desktop—Current Toolbar—Function Key Mapping.

To use a mapped function key, press the function key alone or while simultaneously pressing the SHIFT or ALT to begin a wizard. Some function keys are reserved by Microsoft Windows and cannot be used.
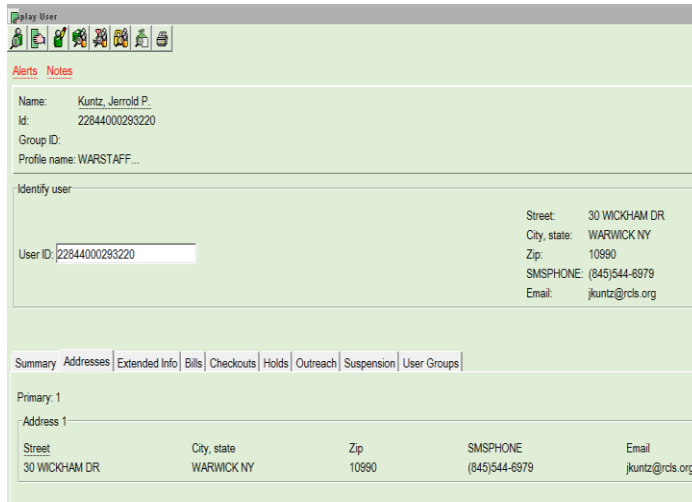
2.3 USER SEARCH

User Search is a helper that appears in many wizards throughout Workflows. The Display User wizard (found in the Circulation module, Users wizard group) is one place where the User Search helper is found. The User Search helper is represented by an icon of a green person with a magnifying glass hovering over them. Click on that icon and a User Search window appears.

Note that there are Types of user searches: Keyword or Browse (a third type, Browse User Group is a special function that may or may not be used by ANSER in the future). Browse means last name must be entered first in the "Search for" box.

There is also a drop-down list of various user Index fields that can be searched, but the main ones are Name (the default), Email, Phone, Street, and User ID (barcode). Note that the Library field allows a user search to be limited to a certain library. In some situations that may be helpful, but within ANSER patrons tend to move from one library district to another and/or use libraries other than their home library, so the default of ALL_LIBS is preferred.

When conducting a Name/Browse search, note that the closest matching entry appears second on the result list and will be highlighted. The list shows user ID (barcode), phone, and birth date. (Alt ID is a legacy field from the Horizon borrower number, but we may remove that in the future). 52 entries appear on a page in the result list, but it can be paged forward or backward using the arrows. The page of results can also be re-sorted by barcode, phone, birthdate, etc. by clicking on those column labels.
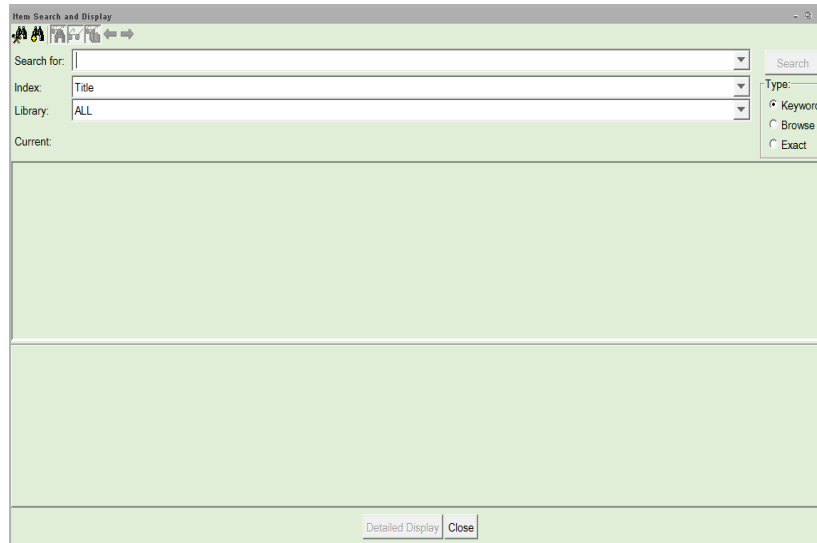
The Display User wizard brings together everything you'd want to look up about a patron: all their registration information, registration and activity dates and counters, notes, bills, current checkouts, current holds, etc. This information can be found in the various tabbed entries toward the bottom of the screen.
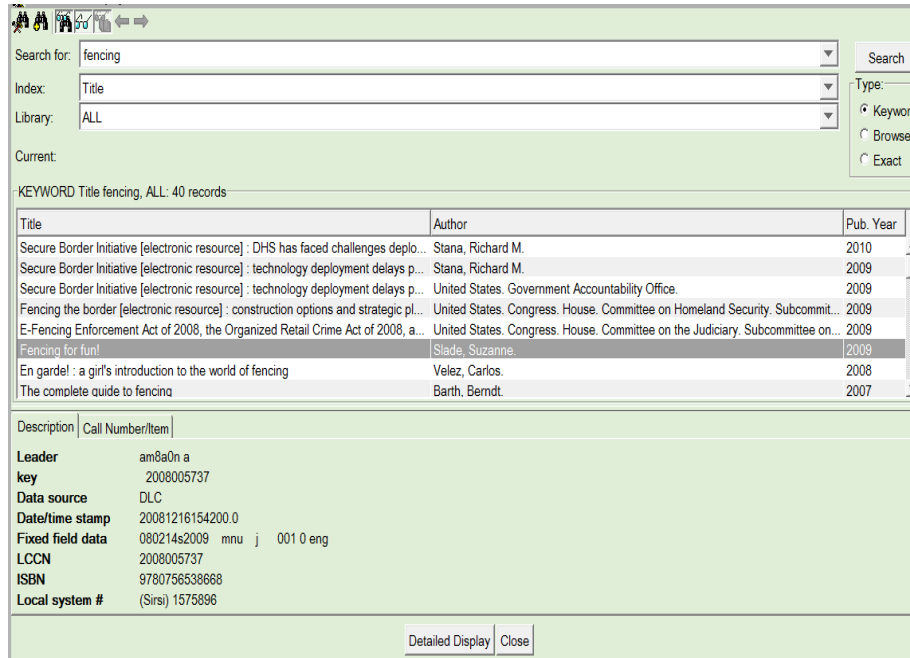
2.4 ITEM SEARCH AND DISPLAY WIZARD

Use the Item Search and Display wizard to perform Keyword, Browse, or Exact searches of the library catalog. It displays information at the title, call number, and item level. You can also view circulation, hold, order, and statistical information about each item.

To search for an item in the bibliographic database: Click the Item Search and Display wizard. It is found in the Common Tasks wizard group of nearly every module (or press the **F4** function key.) The following window appears:

1. In the Search For box, type the title or other criteria to search.

2. Select Keyword, Browse, or Exact for the type of search you want to perform.

3. In the Index drop-down, select the index you want to search (Title, Subject, Author, etc.).

4. You can qualify the search in the Library drop-down by selecting a single library or all libraries.

5. Click **Search** or press **ENTER**. All item records fitting the criteria you entered will display:
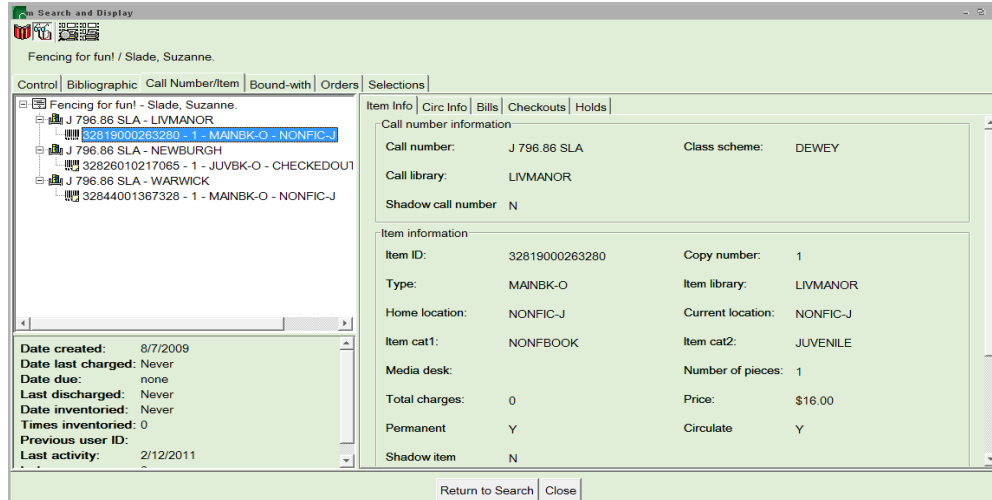
The Item Search and Display results window (which will appear as above if more than one title meets your search criteria) is divided into three sections (panes) that change depending on the activity you perform.

- Search Pane. Contains the fields needed to perform a search and retains the last search that you performed.

  The Search Pane can be visible or hidden by using the helper icon of the binoculars with glasses.

- Hit List Pane. Displays the hit list pane displays all records that qualified on the search. You can expand the size of this pane and each column. You can also reorder the columns by dragging them with the mouse. Resort each list by clicking the Title, Author, or Pub. Year headings (there is a limit as to how many titles can be sorted: 200.)

- Viewer Pane. Title, call number, and item level information for the record selected in the hit list pane displays in the viewer pane. Click the plus and minus signs to expand/collapse the call number and item records.

  The Viewer pane can be can be visible or hidden by using the helper icon of the glasses.

You can adjust the size of the Hit List pane and Viewer pane by dragging on the border frame that separates them.

With the Item Search and Display window open, a Detailed Display button displays. Clicking this button displays additional information on the selected title. (Double-clicking a record in the hit list pane performs the same function.) Detailed Display provides in-depth information about the bibliographic, call number, and item level records.

The Call Number/Item tab displays information about individual call numbers and items attached to a bibliographic record. In Symphony, there are three levels of records: Bib Records, Call Number Records, and Item Records. There will be a separate call number record for a title for each variation in the main call number, volume designation and owning library.

When displaying Call Number and Item records, Workflows will show records belonging to the Login's library first. All other libraries will be listed alphabetically.

The Call Number/Item tab is subdivided into additional categories of information, which can include item checkouts, circulation, bills, holds, and general information about the item.

The circulation information can be made visible or hidden using the helper icon of the glasses with book.

The Control tab contains information about the bibliographic record: its key & control number (a unique number assigned to title records when

they are added to Symphony); the date the record was added; and the date that RCLS catalogers declared the title fully cataloged.

The Bibliographic tab shows the MARC record with numbered MARC tags and indicators. The MARC fields contain the words/text that is indexed for keyword and browse searching.

Search Indexes

Catalog searches in Symphony are based on the numbers and words found in the title record (also referred to as the bibliographic record). Since the 1960s, the standard format for computerized bibliographic records has been the MARC format (Machine Readable Cataloging). MARC takes standard bibliographic concepts, like AUTHOR, TITLE, SUBJECT, etc. and assigns them specific field (tag) numbers on a form.

A typical MARC record found in Symphony looks like this:

Tag	Ind.	Contents
001		16285808
005		20100819153600.0
010		2010279450
020		9781423121718
035		(Sirsi) 1684328
082	04	813/.6|a[Fic]
97	00	PZ7.R4829|bPe 2009
100	1	Knight, M. J.|q(Mary-Jane)
245	00	Percy Jackson & the Olympians :|bthe ultimate guide /|c[written by Mary-Jane Knight].
246	3	Percy Jackson and the Olympians
246	3	Ultimate guide
260		New York :|bDisney-Hyperion|cc2009.
300		146 p. :|bchiefly col. ill., col. maps ;|c19 cm.
490	1	Percy Jackson & the Olympians
500		"Based on the Percy Jackson & the Olympians series by Rick Riordan"--t.p. verso.
500		Statement of responsibility from t.p. verso.
505	0	Percy Jackson -- Life at camp -- Gods & spirits -- Percy Jackson's bestiary -- The labyrinth -- The underworld -- The storehouse of the Gods -- Compendium.
650	1	Jackson, Percy (Fictitious character)|vFiction.|?UNAUTHORIZED
650	1	Mythology, Greek|vFiction.
650	1	Camps|vFiction.
650	1	Friendship|vFiction.
650	1	Fathers and sons|vFiction.
650	1	Animals, Mythical|vFiction.
650	1	Monsters|vFiction.
650	1	Labyrinths|vFiction.
650	1	Titans (Mythology)|vFiction.
800	1	Riordan, Rick.|tPercy Jackson & the Olympians.
856	42	|3Publisher description|uhttp://www.loc.gov/catdir/enhancements/fy1010/2010279450-d.html

On most WorkFlows search screens, we have the display set to replace those MARC field (tag) numbers with more helpful descriptive labels:

Description	Call Number/Item

Leader	am5a0c a
key	16285808
Date/time stamp	20100819153600.0
Fixed field data	100616s2009 nyuabo j 000 1 eng d
LCCN	2010279450
ISBN	9781423121718
Local system #	(Sirsi) 1684328
Dewey Decimal Classification Number	813/.6 [Fic]
97	PZ7.R4829|bPe 2009
Personal Author	Knight, M. J. (Mary-Jane)
Title	Percy Jackson & the Olympians : the ultimate guide / [written by Mary-Jane Knight].
Variant title	Percy Jackson and the Olympians
Variant title	Ultimate guide
Publication info	New York : Disney-Hyperion c2009.
Physical description	146 p. : chiefly col. ill., col. maps ; 19 cm.
Series Statement	(Percy Jackson & the Olympians)
General Note	"Based on the Percy Jackson & the Olympians series by Rick Riordan"--t.p. verso.
General Note	Statement of responsibility from t.p. verso.
Contents	Percy Jackson -- Life at camp -- Gods & spirits -- Percy Jackson's bestiary -- The labyrinth -- The underworld -- The storehouse of the Gods -- Compendium.
Subject term	Jackson, Percy (Fictitious character)--Fiction.
Subject term	Mythology, Greek--Fiction.
Subject term	Camps--Fiction.
Subject term	Friendship--Fiction.
Subject term	Fathers and sons--Fiction.
Subject term	Animals, Mythical--Fiction.
Subject term	Monsters--Fiction.
Subject term	Labyrinths--Fiction.
Subject term	Titans (Mythology)--Fiction.
Series Added Entry-Personal Name	Riordan, Rick. Percy Jackson & the Olympians.
HTTP	http://www.loc.gov/catdir/enhancements/fy1010/2010279450-d.html
Held by	CHESTER SLOATSBURG TOMKINS

Specific MARC fields are combined to create the indexes that are searched in WorkFlows. For instance, the TITLE index is made up of the Title field, and also Variant Title, Contents (sometimes!), and Uniform Title (not shown in this example).

The full list of MARC tags that is included in each WorkFlows index is listed below:

Index	CODE	MARC tags
Author	(AU)	100,110,111,505(t),700,710,711
Title	(TI)	130,245,246,440,505(t),730,740
Periodical	(PER)	245,246,780,785
Subject	(SU)	600,610,611,630,650,651,655,690,691
Series	(SER)	400,410,411,440,490,800,810,830,840
ISBN		020,024 (UPC)
General		[All of the above]
Call Number		

Search Types

In addition to different search indexes, there are different methods that can be used to search those indexes. These are known as Search types. They can be selected using the clickable radio buttons in the Search pane.

Keyword

Keyword searching returns records that contain the term(s) entered, wherever they may appear in the field(s) specified in the search. Author, General, Periodical Title, Subject, and Title are keyword-searching options that support Boolean and proximity operators, substitution, truncation, and nesting.

Note that Keyword searching in WorkFlows will ignore certain "Stop words" because they are so common:

A,an,as,at,be,but,by,do,for,if,in,it,of,on,the,to

This is NOT true in the keyword searching found in the Enterprise public catalog. In Enterprise, there are no stop words.

Browse

In a Browse search, SirsiDynix Symphony matches terms entered character by character with cataloged entries in the system. The Browse option produces a list in the alphabetic vicinity of the term you typed. The second item in the list-the closest match-will be highlighted, and from that point you can browse forward or backward in the list.

BROWSE SEARCHES WILL NOT LIST TITLES WHERE ALL COPIES AT LIBRARIES ARE "SHADOWED" (i.e. Lost or Missing.)

Note that Browse searches will ignore an initial article (a, an, the) if you include it in your search terms; and Symphonies alphabetical browse list of titles will also ignore those initial articles. So it is best to leave them off your search term.

When symphony sorts titles in a title browse list, it knows to ignore those initial articles from the numeric MARC "tag indicators." Example:

245 14   The right address|h[large print]

In this example, "245" is the MARC tag for Title. The "4" tells Symphony to skip four characters and file this title under "right".

Sometimes the indicators in a MARC record are incorrect. Example:

245 10   The right address|h[large print]

In this case, the indicator "0" means do not skip any characters, and file this under "The right"

Browse searches may also separate different editions of the same title, if the subtitle differs. Example:

"Lion King original Broadway"

In separated by other titles from

"Lion King the landmark musical event"

Although both are original cast recordings.

Browse searches do not display the GMD (General media designator, i.e. CD, DVD, Blu-Ray, etc) on the first screen that gives a count of headings with the same title
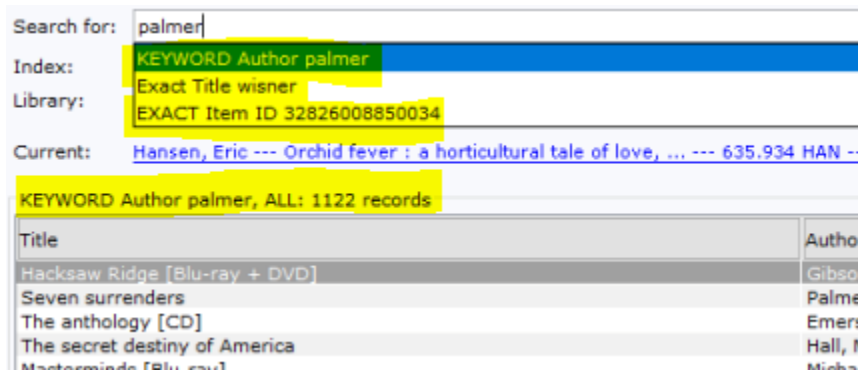
Exact

If you select Exact, SirsiDynix Symphony searches the browse list, and if it finds an exact match, it displays only the matching record or hit list associated with that entry. If SirsiDynix Symphony does not find an exact match, a browse list appears

at the point closest to the search term. Exact searches are best for numeric searches where only one value exists, like Item barcode or Title control number.

Search History

You can view the history of your searches during a session by opening the "Search for" dropdown in the Search pane.

The line in between the Search Pane and the Hit Results pane also gives you thye summary of your current search: which index was used, which search type, the search term you entered, and the number of hits.

Search Operators

Keyword type searches that involve more than one word require the computer to interpret the relation that exists between the words. That relation is defined by operators. Symphony supports both Boolean (set logic) operators and Proximity (text analysis) operators.

Boolean operators

OR is used to join synonymous or related terms, and instructs the search tool to retrieve any record that contains either (or both) of the terms, thus broadening your search results.

The **OR** operator is particularly useful when you are unsure of the words used to categorize your topic or if information on your topic is

even available. If you are retrieving too few records, broaden your search by adding a synonym with the Boolean Operator **OR**.

AND is used to join words or phrases when both (or all) the terms must appear in the items you retrieve.

This search query would return a much smaller set of records, and the items found would be more specific to your research question. If you are retrieving too many records, try adding another search term with the Boolean Operator **AND**.

NOT is used to exclude a particular word or combination of words from your search results.

If you are retrieving many records that are unrelated to your topic, try using the **NOT** operator to eliminate a word. This should be done cautiously, because as well as deleting the unwanted items, such a search will also eliminate records that discuss both the relevant topic as well as the unrelated topic.

Be careful with titles that include these operator words. Example:

A General or Title keyword search of: bud not buddy   will produce titles that contain the word bud but do not contain buddy. You can avoid this problem by using double quotes around "not":

Bud "not" buddy   will only find titles with bud and buddy.

Proximity Operators

      a. African SAME American -- **IMPORTANT: This is the default operator in Symphony Keyword searching** --- terms appear within the **same index**.
      b. African WITH American - term in the same sentence
      c. Chocolate NEAR milk or king NEAR charles– terms appear together, but the order of the terms not important
      d. Chocolate ADJ milk   -- order of terms is important
         Example: King ADJ Charles

Precise Phrase searching

      a. 'United States of America' single quotes for this exact phase.

Truncation = $

    a. Cook$ -Title search - to pull up cooking, cookery, cooked, cookbook, etc.
    b. Electr$ - subject search - to pull up electric, electricity, electrical, electrician

Substitution = ?

    a. Wom?n for women or woman
    b. Theat?? For theater or theatre EX = (King of Shadows)

Item Search and Display Window Helpers

Two helpers display on the Item Search and Display window: *Configure Options for the Item Search* and *Advanced Search*. These helpers are tools to provide focus and limits on the searches conducted.

Configure Options for the Item Search (Filtering)

The Configure Options for the Item Search Helper has three tabs on which to establish default item search criteria. Only the top tab, Search Options, will be of occasional use:
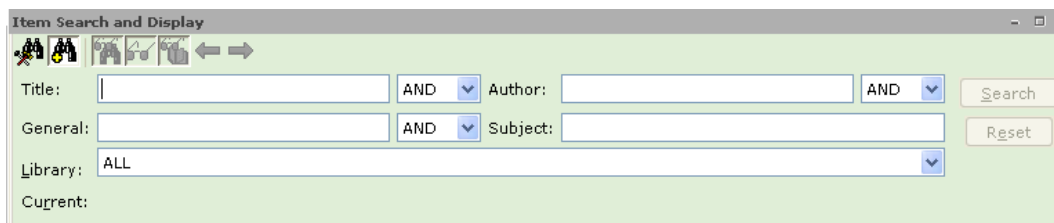

- Publication Year – Type an operator and publication year, and the search will only locate titles published on, before, or after a

particular year, or within a range of years. The operators that can be used are: less than (<), greater than (>), equal to (=), not equal to (<>), less than or equal to (<=), and greater than or equal to (>=). The substitution (?) and truncation ($) symbols may also be used.

- Item Type – Select an Item Type policy from the list.
- Location – Select a Location policy from the list.
- Item Category 1 and Item Category 2 – Select Item Category policies from the lists. Item Category 1 lists broad format categories used on the New York State Public Library Annual Reports. Item Category 2 lists broad audience designations: Adult, Juvenile, Teen.
- Language – Select a Language policy from the list.

Advanced Search

The Advanced Search Helper changes the search options at the top of the Item Search and Display window. These options allow you to use Boolean operators from a drop-down selection to refine searching:

We do not anticipate that Advanced Search will be used often, since the General Keyword index picks up all fields and Boolean operators can be typed between search terms without needing a drop-down selection.

Other Search Tips

- The Title Index includes MARC tag 245 subfield h, which is the GMD, or General Media Designator. In ANSER this can be words such as "CD" "DVD" "BLU-RAY", "LARGE PRINT" "UNABRIDGED" "PLAYAWAY" "XBOX" "PS4", and others. These words can be included in Title or General Keyword searches to narrow down to specific media formats.
- If you use the General Keyword index, you can specify which indexes within the General Keyword index can be targeted by each search term, using Index codes in braces (curly brackets.} Examples:

Finn {ti} and Twain {au}
Walls {su}
Obama {au} and Obama {su}

- Be careful using Author Keyword or Author Browse for new titles—CAPS records do not include an author field.
- Call number searches can only be library-specific, not ALL libraries.

2.5 SYMPHONY TERMINOLOGY

Bill

When an item is overdue and is returned, the overdue fine becomes a bill that can be paid. Bills can also be created for damaged materials, lost items, photocopies, etc.

Delinquent

A user status that requires attention by a library staff person. This term does NOT necessarily mean that the user has violated library policies or procedures.
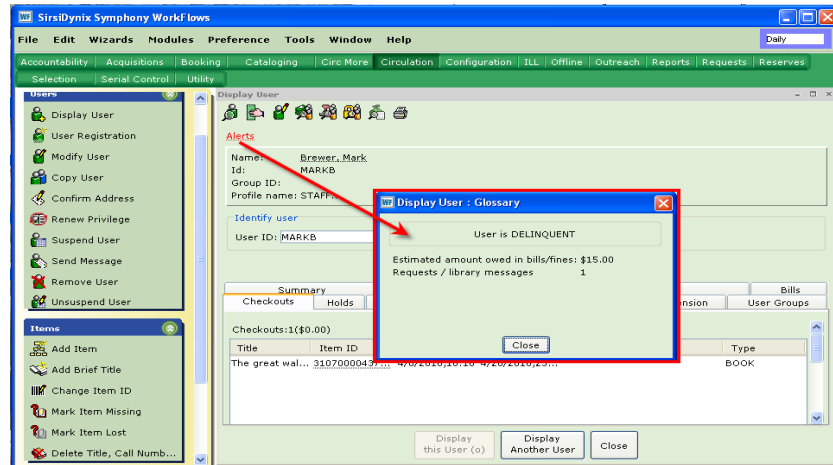
Fine

Fines accrue on overdue materials until the materials are discharged and a bill is automatically created. Fines cannot be paid…bills are paid.

Gadget

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

Glossary

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

Tabs

Most of the data managed by WorkFlows is managed using categorized tabs. You can access data by clicking on the folder's tab. The tab that displays depend on which WorkFlows modules your library has been configured to use.

Toolbox

A toolbox will appear in the upper left corner of some wizard tabs. The toolbox will contain tools that will assist you in creating, modifying, duplicating, or removing tab information. For example, the Claimed tab in serial control wizards will display the Create a Claim, Change an Issue, and Remove Claim(s) tools in the tab toolbox.

ToolTips

A ToolTip is brief definition that appears when you move the cursor over a wizard. This is also called Balloon Help.

User

A library patron; a library borrower.

Wizard

A wizard is a button on a toolbar that guides you through the steps to accomplish a task. When you move the cursor over the wizard, the name appears, and a description of the wizard displays in the status bar.