



Eric Keith, CMO

EPISODE 7

# *COVID-19 Webinar Series*

## *Preparing to Re-open Your Library – for Symphony*

- Today we're releasing the 6<sup>th</sup> & 7<sup>th</sup> installments in our COVID-19 webinar series.
- We have pre-recorded these sessions because the interest in participating is so large, we were worried we'd break the platform again. Thank you!
- You can view the five previous webinars in this series on-demand at:
  - [SirsiDynix.com/Covid-19-Resources](https://SirsiDynix.com/Covid-19-Resources)
- Today's webinars are a bit different from our previous COVID webinars – they are designed for Horizon & Symphony users

# *Welcome!*



- COVID-19 Responses for Libraries group now forming
  - Community of ideas and sharing
  - Will be housed in Basecamp
  - Will be open to all libraries, not limited to SirsiDynix customers
  - Opt-in by sending email to [spp@sirsidynix.com](mailto:spp@sirsidynix.com)

*New Opportunity  
for Collaboration!*

Effective immediately through April 30, 2020:

- Our entire catalog is free to

- Available

- Selected free for

- Classes include and much more Symphony.

- Sessions will be held to accommodate libraries from all time zones.

# Free Training Extended Through June 1<sup>st</sup> !

Announcement for Today on All Free Courses

MAY  
**19**

Opening Day

DIRECTORS  
EDITION



**Connections**  
SUMMIT

Featuring **keynote panel discussion** moderated by Matt Enis of Library Journal for Preparing Your Library for a Post-Covid Environment, Going Fine Free with Brenda Cameron, Library Technology by Marshall Breeding, and much more!

*Content Intentionally Designed for Everyone!*

Customers & Non-Customers Alike

MAY  
**20**

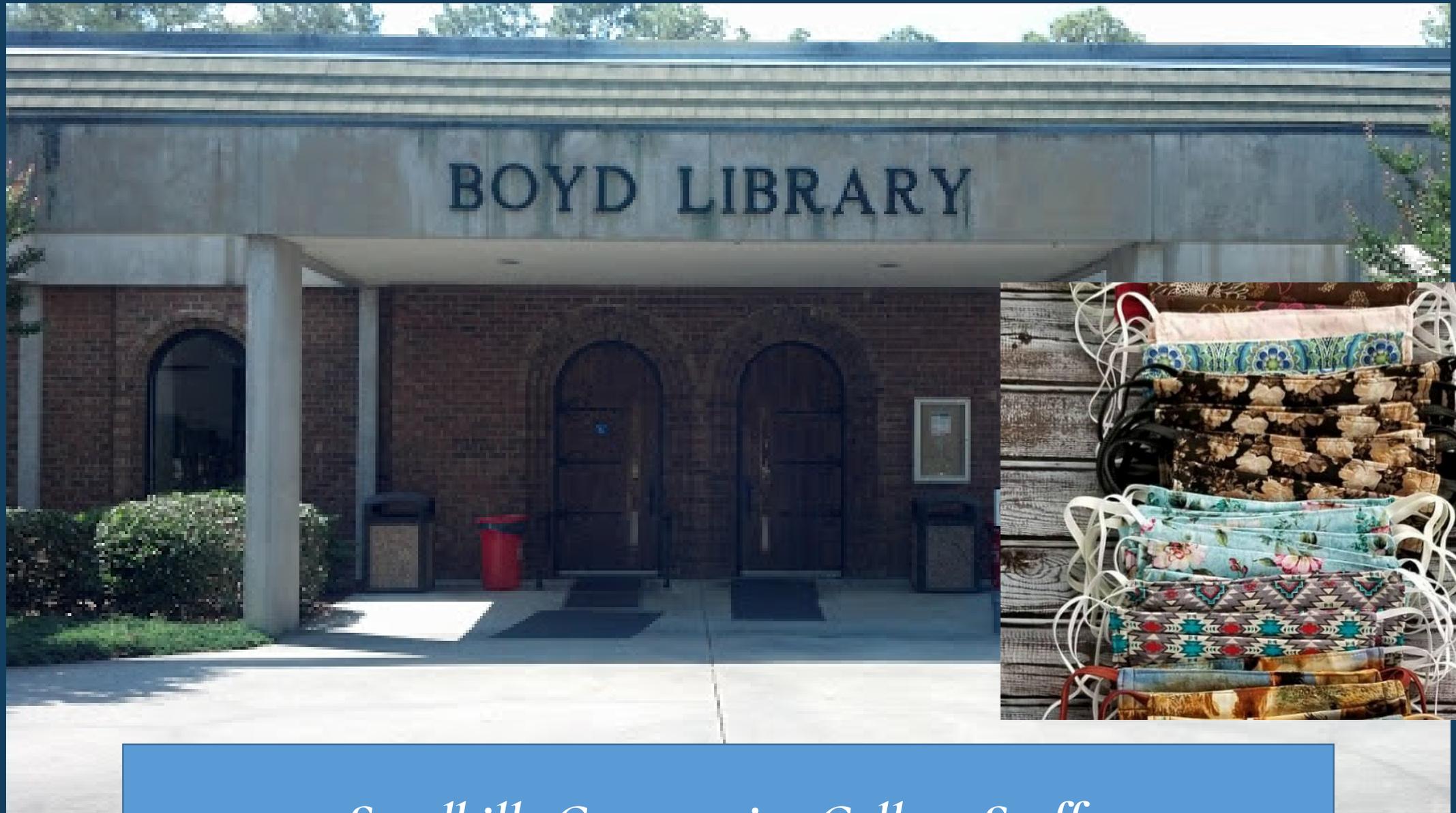
Experience SirsiDynix Day

DIRECTORS  
EDITION



**Connections**  
SUMMIT

Focusing on **SirsiDynix products and roadmaps**, get updates on BLUEcloud, Cataloging, Circulation, **and exciting new products** like BLUEcloud Course Lists and the Community Engagement Platform.



*Sandhills Community College Staff:  
Making masks for our local hospital*



beloit public library  
*making a great city even greater*

*Beloit Public  
Library  
Keeping moral  
among staff up by  
providing training  
opportunities.*



*“They are going to come back to the library stronger and more capable after all of this for sure.”*



EPISODE 6

# *Preparing to Re-open Your Library - Symphony*



Lori Berg  
Symphony Guru  
Professional Services



Karla Smith  
ILS Manager  
Winnefox Library System



*All resources will be available after the webinar at:*

**[SirsiDynix.com/Covid-19-Resources](https://www.sirsidyndix.com/Covid-19-Resources)**

*Thank You!*  
*Stay Safe & Healthy!*



Eric Keith  
Chief Marketing Officer



# *Preparing to Reopen*

Symphony



# *Planning to reopen*

- Handling Returns
- Circulating Items
- Waiving Fines
- Filling Holds
- Notice Reports
- OPAC Changes
- Special Library Considerations

# *Handling Returns*

# *What to do when the items are returned*

- Quarantine THEN Check-In
  - Let patrons know there will be a delay between date returned and date removed from account

# *What to do when the items are returned*

- Check-In THEN Quarantine
  - Holds will be trapped
    - Suspend Active Unavailable Holds
  - Material will appear it is available on the shelves
  - Items may go into transit
- FREE Custom Report to Check-In items in batch and then Check **OUT** to System Use User
  - Companion report to discharge items once quarantine period passes.

# *Did you Modify Due Dates during Closure?*

- Using Custom Extend Due Dates by a Number of Days
  - Due dates should be staggered for normal return levels
- Using Standard Edit Due Dates Globally
  - Notify patrons that material currently checked out from “date” to “date” will not result in any fine (or any fines will be forgiven)

# *Circulating Items*

# *All Library Locations opening on Same Date*

- Update Closed Dates in Configuration > General Configuration> Library Wizard
- Update Library policy with any closed dates to avoid overdue fines.

# *Update Library Closed Dates*

- Not Necessary if updating the Library closed dates as Stay-At-Home orders were announced
- May need to visit each Library policy if some locations are remaining closed.

# *Quarantine Items Checked Out Post Opening?*

- You may want to:
  - Lower the Number of Items Patrons can have Checked Out
  - Lower Number of Holds to be at or below the Item Charged Limit

*This would help reduce daily returns and number of items in Quarantine.*

# *Standard Due Dates?*

- You may want to:
  - Extend Loan Periods post Reopening
    - Modify Circulation Rules to a Longer Loan Period
    - Add a Healthy Grace Period to Circulation Rule
      - Same Due Date but limit to Fine Accrual

# *Waiving Fines*

# *Will you be Waiving Fines Accrued during Closure?*

- On All Items
  - Use Fine Free Discharge/Checkin Wizard
    - Will Trap Holds
    - Will Transit Items
    - Consider Free Custom Report in the Handling Returns section
    - Does not write Pay Bill Transactions
      - No report to see how many fines were waived

# *Will you be Waiving Fines Accrued during Closure?*

- FREE Custom Report
  - Allow you to Selectively Waive Fines In Batch
    - Will Provide Reporting Capabilities on Fines Waived

# *Filling Holds*

# *Did you Suspend Holds during Closure?*

- Using the Custom Suspend Active Unavailable Holds report
  - Can Unsuspend using the Unsuspend Holds Report
    - Uses the file of Holds keys created from the Suspend Report

# *Did you Suspend Holds during Closure?*

- You can Unsuspend on your Time Frame
  - Once Holds Are Unsuspended
    - “List Onshelf Items With Holds” report will report “larger than normal” number
      - Opt to NOT Trap everything
      - Modify “List Onshelf Items with Holds” report to qualify based on Date Placed field.

# *Did you want to Limit to “Local Holds”*

- Modify Library Policy
  - Check “Onshelf Items will not be selected for holds on Closed Dates” checkbox
  - Run “Pull Onshelf Holds” report with Closed Date = TODAY
- Sort by Pickup Library in Onshelf Item Wizard and only pull own items.

# *Are some libraries remaining closed to the Public?*

- Modify Library Policy
  - Uncheck “Onshelf Items will not be selected for holds on Closed Dates” checkbox
  - Run “Pull Onshelf Holds” report with Closed Date = TODAY
  - Run Custom Report Edit Hold Pickup Date and/or Library
  - Modify notice text to alert patrons of new pickup location.

# *Did you want to Limit to “Local Holds”*

- FREE Custom Report
  - Custom version of the “List Onshelf Items with Holds” report
  - Allows you to select Pick-Up Library
  - Generates a list of Items Owned by that Library to pull for Holds
  - Will prevent items going into Transit to fill Holds

*--NOTE: This will bypass the Onshelf Items Wizard. Staff will need to use Report Output*

# *Notice Reports*

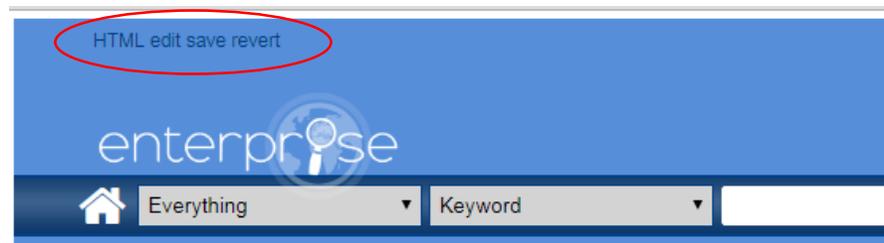
# *Did you Suspend Notice Reports during Closure*

- Unsuspend Reports when Ready
- Consider Date Ranges if not using “Since the beginning of the system”

# *OPAC Changes*

# *Enterprise*

- If you added a closure note to any Enterprise Profiles



# *BC Mobile*

- If Library Hours were hidden from the app
  - Log into the BC Mobile CMS
  - Navigate to Channels
  - Select a library channel
  - Move to Mobile Channel Settings
  - Select the “Show Opening Hours checkbox
  - Enter opening hours as needed

# *Special Library Considerations*

# *Custom Process Long Overdue report*

- Manage loss of material due to students not returning
- Optional Report to Batch check out items due back to a MISSING user



*Come in!* WE ARE

**OPEN**