

Staff Learning Certifications: Mentor/Moodle



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Academic SIG
A COSUGI Special Interest Group



Agenda

- Previous training model
- Developing competencies
- Mentor classes & creating quizzes
- Badging, certificates, and administration
- Impact



LOUIS is a consortium of public and private college and university libraries in the state of Louisiana. This partnership was formed in 1992 by the library deans and directors at these institutions, in order to create a cost-effective collaboration among the institutions for the procurement of library technology and resources.

Our community provides cost-effective information resources, services and technology that support the teaching, learning, and research missions of our members' institutions.

We are currently forty-seven members strong.

System Administrator Boot Camp Agenda



SYSTEM ADMINISTRATOR DUTIES



INTERLIBRARY LOAN



SYMPHONY BASICS

Terminology

Workflows Client

Documentation and Community



ELECTRONIC RESOURCES



SYMPHONY MODULES

- Circulation
- Cataloging
- Reserves
- Reports
- Configuration



LOUIS Strategic Plan

Enhance professional development opportunities for librarians and staff of
LOUIS member libraries that facilitate collaboration and innovation



Perform an assessment
of professional
development and training
needs of
LOUIS member libraries



Explore options for
certificate/recognition
programs for mastering
new skills



Develop strategies to
increase membership
participation in LOUIS
consortium activities and
programs



LOUIS Learning Management System

My courses

ILS System Admin Level 3 (Advanced)



This course defines intermediate level competencies for System Administrators using Symphony WorkFlows and provides them with the resources needed to gain the necessary skills to work as an intermediate or Level 2 Sys Admin. Upon completion of the training, there is a self-evaluation meant to pinpoint the areas that require further training through work with the LOUIS staff. Due to restrictions on access to vendor administrative portals, the intermediate and advanced level courses will be open only to the designated [LOUIS System Administrators](#).



Moodle Account Request Form

Please use this form to request a new Moodle account or if you already have an account, to enroll in a new course. Moodle is the learning management system LOUIS is using to provide tiered training for you.

Enter your first and last name (required)

Institution: (required)

Enter your email address (required)

Which Courses would you like to be enrolled in?

Please note that the beginner level System Administrator and Electronic Resources Administrator courses are open to all members of the LOUIS community. It is always a good idea to check with your supervisor to make sure that this training is appropriate and useful for you. Intermediate and Advanced level courses will only be available to the [LOUIS designated points of contact](#) as these will require access privileges that are not available to all. (required)

- ☐ System Administrator Beginner
- ☐ System Administrator Intermediate
- ☐ System Administrator Advanced
- ☐ Electronic Resources Beginner
- ☐ Electronic Resources Intermediate

Level One:

Beginner level for library staff with little to no experience with Symphony WorkFlows.



Course Orientation

- Mentor access



About LOUIS

Basics

- WorkFlows basics: navigating, customizing interface
- Search strategies



Administration

- Edit user accounts, staff accounts, and assign appropriate privileges.
- Can apply changes to wizard properties and toolbars, and can review and edit format policies, item policies, loan periods, and locations.
- Can configure printers and peripherals to work with Workflows.



Circulation

- Can search and edit user records.
- Understands how check outs, renewals, charges and holds operate in Symphony.
- Understands the circulation map, and how due dates for different material/user profile combinations are calculated.



Cataloging

- Can find and edit bibliographic, call number, item and MARC holdings records.




Self-Assessment

Rate your degree of confidence by recording a number from
0 - 100 using this scale:



WorkFlows: Cataloging

ILS L1


I can find and edit bibliographic records (0 - 100) 


I can find and edit call number records (0 - 100) 


I can find and edit MARC holdings records (0 - 100) 


WorkFlows: Administration


ILS L1

I can create user accounts (0 - 100) 

I can create staff accounts (0 - 100) 

I can assign appropriate privileges (0 - 100) 

I can apply changes to wizard properties and toolbars (0 - 100) 

I can review and edit format policies, item policies, loan periods, and locations (0 - 100) 

Competencies

Follow up

- Scores 70 and under are listed and sent to LSP team
- LSP team schedules one-on-one meeting on topics
 - Agenda created using the final assessment
 - Typically Zoom meeting, one hour long
 - Presentation and Q&A

Level One, Beginner

Symphony Administrator - Basic

- I can search and find records in the catalog - WorkFlows Item Search and Display.
- I am familiar with advanced search strategies.

WorkFlows: Circulation

- I can search and edit user records.
- I understand how check outs operate in Symphony
- I understand how renewals operate in Symphony
- I understand how charges operate in Symphony
- I understand how holds operate in Symphony
- I am familiar with the circulation map
- I understand how due dates for different material/user profile combinations are calculated

WorkFlows: Cataloging

- I can find and edit bibliographic records
- I can find and edit call number records
- I can find and edit MARC holdings records

WorkFlows: Administration

- I can create user accounts
- I can create staff accounts
- I can assign appropriate privileges
- I can apply changes to wizard properties and toolbars
- I can review and edit format policies, item policies, loan periods, and locations

WorkFlows: Reports

- I am familiar with the types of reports
- I can run and schedule basic reports
- I can create basic reports
- I can view report results
- I understand bibliographic load reports

Level Two, Intermediate

WorkFlows: Circulation

- I can search for users using different indexes (name, user ID, email).
- I can find and read user alerts and notes.
- I can print a user record and understand how to customize the print job to include the information I need.
- I understand how to use the Modify User Helper to modify a user record including resetting their PIN.
- I can add a new user using the User Registration Wizard.
- I understand user statuses: barred, blocked, OK, delinquent.
- I understand how users can be removed with reports or with the Remove User Wizard.
- I understand where to find the commonly used circulation tools like CheckOut, Discharging, and Renew Item.
- I can check books in using the Bookdrop Wizard.
- I understand how to pay all of a user's bills or specific bills in the Pay Bills wizard.
- I can modify User Due Dates using the CheckOut Wizard or the Special Due Date Helper.
- I can place and edit holds for users.

WorkFlows: Cataloging

- I can create a custom label template.
- I can configure what text prints on a label using the Label Designer wizard.
- I can measure and set the margins, width and height for the page, label set, and label for a label template.
- I can select a single item with a call number or all items with the call number to remove it from the library collection using the Delete Title, Call Numbers or Items wizard.
- I can use a special User ID like DISCARD to remove items from the library collection.
- I can use the Set Items to Discard and the Remove DISCARD items report to remove items from the catalog permanently.
- I can run the Remove Items by Location report to remove items from the catalog permanently.
- I understand the importance of running reports that will permanently remove items in Test before running them in Production.
- I can schedule a report to discard or remove long overdue items.

Level Two, Intermediate (cont.)

WorkFlows: Administration

- I can create and modify overrides for functions within wizards.
- I can customize policy lists that are visible to staff.
- I can create new circulation map lines.
- I can configure user profiles, item types and circulation rules to make circulation policies in the circulation map.
- I can place circulation map lines in the proper order.
- I can configure bill reasons and billing structures.
- I can configure library policies so that fines accumulate (or not) when the library is closed.
- I can set certain user profiles so that they cannot be billed.
- I can configure default prices for billing for lost or damaged items.
- I can set library policies so that holds are allowed (or not) for onshelf items.
- I can configure location policies to allow holds.
- I can limit the number of holds allowed for certain user profiles.
- I can configure circulation rules to apply an alternate loan period when an item is recalled.
- I understand the reports that can be used to pull holds, to expire unfilled holds, and to manage the hold shelf.
- I understand how a holding code can be used to quickly create item information when doing bibloads or when creating orders.
- I can create and modify holding codes.

WorkFlows: Administration (continued)

- I can set up and run a Transaction statistics report to output circulation statistics.
- I understand the different log types such as history log, statistics log and system log.
- I can use reports such as the Print Cash Report, List Bills report, List Users with Bills report to output information about payments, bills and fines.
- I can create and edit custom notice texts.

Enterprise and BLUEcloud Analytics

- I know how to use the My Account features in Enterprise, such as placing holds, renewing items, and changing PIN.
- I know how to activate the accessibility mode in Enterprise.
- I know how to identify an Enterprise profile by looking at the URL.
- I can manage search targets and search options in Enterprise Admin.
- I can manage which fields and field labels display in Enterprise search results and detail displays.
- I can configure the Enterprise Advanced Search and Facet Display.
- I can run a report in BLUEcloud Analytics.
- I can sort report results data in BLUEcloud Analytics.
- I can export report data to Excel or PDF in BLUEcloud Analytics.
- I can schedule a report and have the results emailed in BLUEcloud Analytics.

Symphony WorkFlows: Administration

Step 1. Review the documentation associated with these classes.

- [Symphony Administration Training Guide](#)

Step 2. Complete the self-paced classes.

- [Administration: Properties and Toolbars](#) (20 minutes)
- [Administration: Library Calendar Configuration](#) (9 minutes)
- [Administration: Format Policies](#) (10 minutes)
- [Administration: Item Types, Loan Periods, and Locations](#) (12 minutes)
- [Administration: Staff Logins and Access](#) (15 minutes)

Step 3. Practice.

- In your own WorkFlows test environment work the exercises at the end of the training guide

When you have completed this section, please move on to [WorkFlows: Administration Quiz](#).

Mapping Competencies to Mentor Classes

Quiz Questions

To access the Set Properties window, right-click on the wizard and select Properties.

Select one:

- ☐ True
- ☐ False

A User Record is assigned a User Profile Policy which in turn is assigned a User Access Policy

Select one:

- ☐ True
- ☐ False

Level Two:

Intermediate level competencies for System Administrators with some experience. Limited to System Administrators (access to most parts of Symphony)



Circulation

- Can manage user records. Can run user load report.
- Modify the circulation map.



Cataloging

- Can create and edit labels
- Can discard items



Administration

- Can customize policy lists
- Can configure item billing and holds
- Can retrieve monthly statistical reports



Enterprise

- Can perform routine configuration in Enterprise



BLUEcloud Analytics

- Can run prompted reports

Level Three:

Advanced level competencies for System Administrators with some experience. Limited to System Administrators (access to most parts of Symphony)



Circulation

- Can manage holds and recalls.



Cataloging

- Can manage authorities
- Can configure SmartPort



Administration

- Can create and edit properties and toolbars
- Can configure staff accounts
- Can load and batch edit bibliographic records



BLUEcloud Analytics

- Can build reports from scratch
- Can join tables
- Can view, export, and subscribe to reports



MarcEdit



Capstone project

Capstone Project

- Demonstrates proficiency with the library services platform (Symphony, Enterprise, BLUEcloud, etc.)
- Provides value to the consortium

Capstone Project

Example Formats

- Presentations
 - Webinar
 - Conference presentation
 - Provide training
- Article
 - Knowledge base article
 - Best practice guide
- Discussion
 - Lead listserv discussion

Topics

- Project recap
 - Catalog cleanup
 - Reclassing a collection
- Best practice or how to guide
 - Annual reports
 - Inventory
- Staff training materials



Additional Courses

- Electronic Resources Administrator
 - Beginner and Intermediate level
- Digital Privacy Course

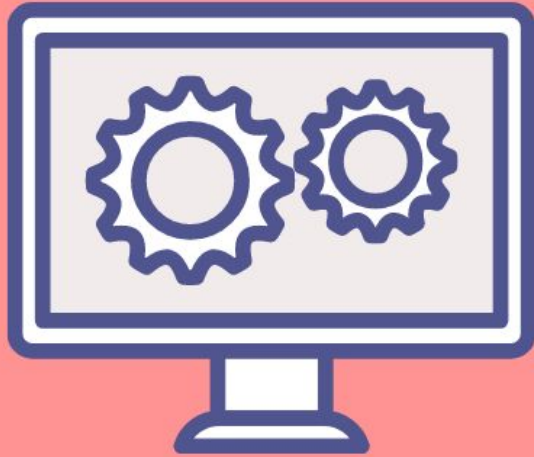
Badging

Badgr

- “A credentialing platform with stackable learning pathways and shareable learner records”
- Uses Open Badges protocol
- Configurable in Moodle
- LOUIS staff add badges to consortium staff directory

Badging

SA 1



LOUIS 

LEVEL 1 SYSTEM ADMINISTRATOR



YOUR NAME

has successfully completed the beginner
system administrator assessment

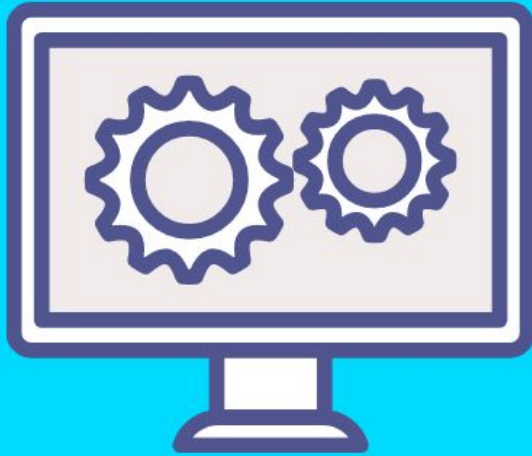
LAURIE BERGERON BLANDINO

Executive Director and
Associate Commissioner for LOUIS

LOUIS 

Badging

SA 2



LOUIS 

LEVEL 2 SYSTEM ADMINISTRATOR



YOUR NAME

has successfully completed the intermediate
system administrator assessment

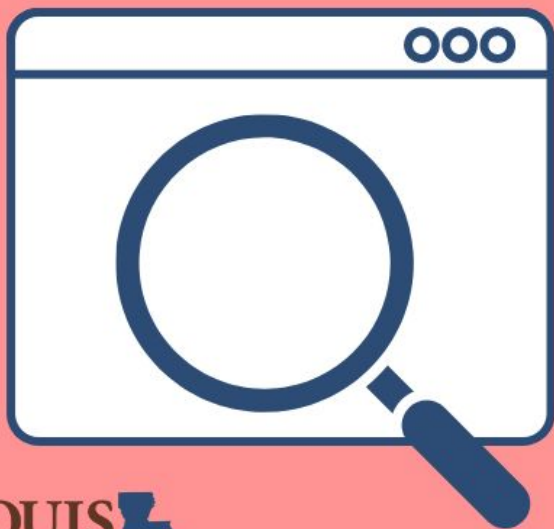
LAURIE BERGERON BLANDINO

Executive Director and
Associate Commissioner for LOUIS

LOUIS 

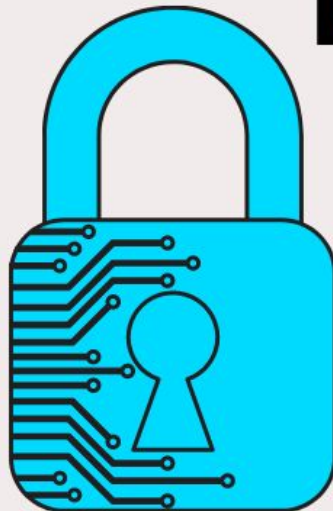
Badging

ER 1



LOUIS 

**Digital
Privacy**



In Partnership with
LOUIS 
THE LOUISIANA LIBRARY NETWORK

Badging



Badging

Badges Collections

Badges

You've earned 5 badges from 2 issuers.

Add Badge

Search by badge name

1 - 5 of 5 < >

☐ Group by issuer



Level 3 Certified System Administrator

LOUIS: The Louisiana Library Network

Certification for the final of three system administrator courses designed and administered by LOUIS: The Louisiana Library Network. This course covers advanced concepts using SirsiDynix Symphony.

May 12, 2022

[Share](#)

New



Basic Computer Skills

Northstar Digital Literacy Assessment

Passed an online assessment in a proctored setting with a score of 85% or higher, demonstrating competency identifying parts and basic functions of common mobile devices, laptops, and desktop computer...

Oct 3, 2020

[Share](#)

New



Microsoft Word

Northstar Digital Literacy Assessment

Passed an online assessment in a proctored setting with a score of 85% or higher, demonstrating competency identifying key features and affordances of Microsoft Word and ability to create, edit, forma...

Oct 3, 2020

[Share](#)

New



Internet Basics

Northstar Digital Literacy Assessment

Passed an online assessment in a proctored setting with a score of 85% or higher, demonstrating understanding of internet access, websites, web navigation, search, and web safety.

Sep 28, 2020

[Share](#)

New



Social Media

Northstar Digital Literacy Assessment

Passed an online assessment in a proctored setting with a score of 85% or higher, demonstrating competency sharing and interpreting information via both personal and professional social media platform...

Sep 28, 2020

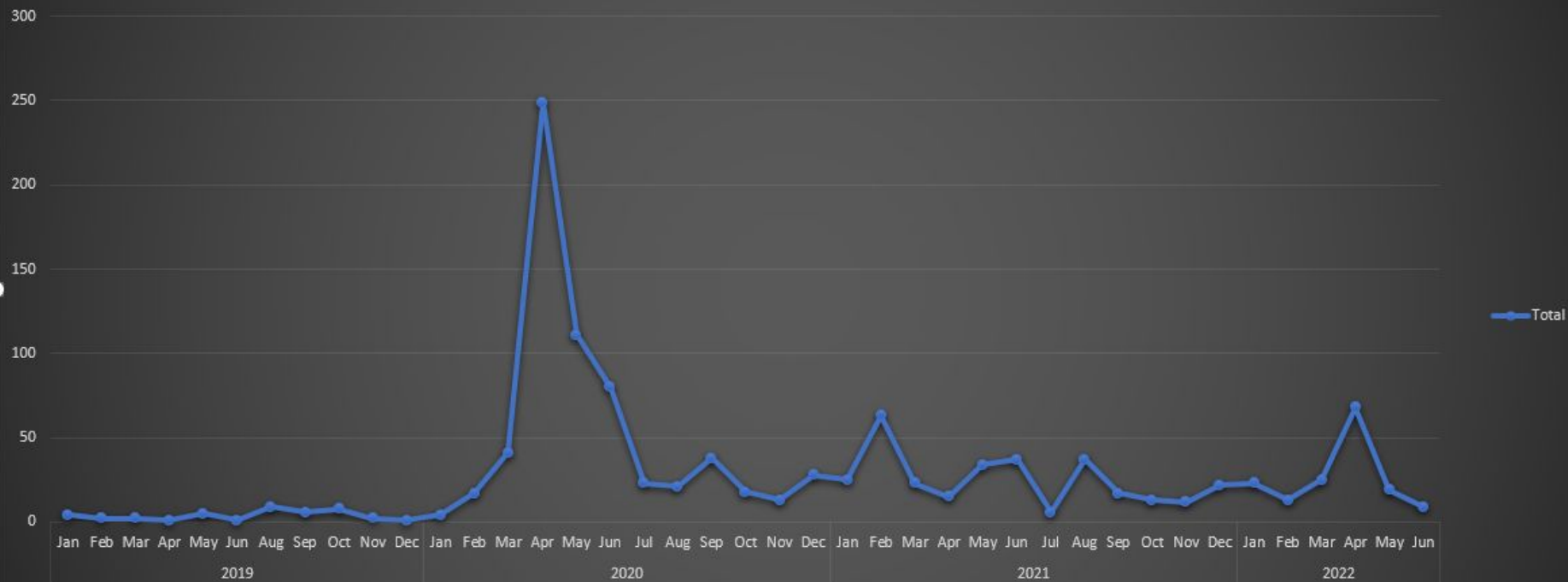
[Share](#)

Impact

- Level 1, Beginner
 - 101 registered
 - 43 completed the course
- Level 2, Intermediate
 - 35 registered
 - 19 completed

Count of Date

Mentor Classes Taken 2019-2022



Impact

- Measurable outcomes
- Works with annual assessment cycles
- Asynchronous learning environment
 - Personalized training
 - Good for virtual learning
- Less staff time
 - Less travel
- Less basic support tickets?

Next Steps

- Advanced System Administrator course released this week
- Course maintenance
- Develop new courses
- Skilltype
 - Library focused professional development platform

Other Professional Development Initiatives

- Symphony Reports Ask-Me-Anything
 - Inspired by SD Stump-the-Chump
 - Monthly
 - Short presentation
 - Using Sliding Date Range in Circulation and Notice Reports
 - Bibloads reports and Holding Codes
 - Using Reports as Filters in BLUEcloud Analytics
 - Counting Items in Call Number Ranges
 - Then live Q&A

Other Professional Development Initiatives

- Product specific Basecamp
 - Inspired by SD SPP
 - Office hours
 - Discussion, sharing
 - Documentation
 - CloudsourceOA Basecamp
 - BLUEcloud Course Lists Basecamp
 - Data Control (planned)
- Skilltype
 - Library focused professional development platform

Questions/Discussion



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AGENDA

TIME (ET)	TITLE	SPEAKER
11:00 AM	Introductions and What to Expect for Today	Mark Witteman, University of Virginia Libraries Mike Waugh, LOUIS
11:05 AM	SirsiDynix Roadmap	Berit Nelson, SirsiDynix
11:30 AM	BLUEcloud Staff Update	Carla Clark, SirsiDynix Lisa Witteman, SirsiDynix
12:00 PM	Break	
12:20 PM	BLUEcloud Course Lists	Rick Branham, SirsiDynix
12:35 PM	Q&A on Academic Symposium	Open Discussion
12:55 PM	Staff Learning Certifications: Mentor/Moodle	Mike Waugh LOUIS Open Discussion
1:15 PM	Web Services Connector	Ranny Lacanienta, SirsiDynix
1:30 PM	Break	
2:00 PM	SSO Staff/SSO Patron	Ranny Lacanienta, SirsiDynix
2:30 PM	Customer Lead Session: Web Services	Open Discussion
2:50 PM	Closing Remarks	Mark Witteman, University of Virginia Libraries Mike Waugh, LOUIS



Enhancements Discussion

- <https://support.sirsidynix.com/enh/96956> -
 - Batch Upload additional fields such as links to course syllabi for class creation in BLUEcloud Course Lists
 - XML outputs, more information about the new import/export data function coming up
- <https://support.sirsidynix.com/enh/89933>
 - BCA - Break out the most frequently used Marc fields into their own attributes
- <https://support.sirsidynix.com/enh/89935>
 - BCA - Bib Marc All Subfields Data
- BLUEcloud Central - CURE-1824. Can't copy an existing user's access settings in BC Central to set up a new user. Used to be able to do this. Critical when setting up lots of staff to be able to copy a current user's roles when adding a new user

Enhancements Discussion

- <https://support.sirsiidynix.com/issue/dsc-7922>
 - Enterprise - Add 856 tag to Search Results Display for Reserves
- <https://support.sirsiidynix.com/issue/uni-39206>
 - User record Charge History rule overwritten by Load Users report
- <https://support.sirsiidynix.com/issue/uni-32814>
 - Loadflatuser cleared "Use Preferred Name" value during user load

