



# Course Catalog

## Current Offerings

*“Bringing Knowledge to Life”*







## SirsiDynix Training Mission Statement

Our mission is to educate our customers with excitement and skill, creating raving fans of SirsiDynix, with confidence in our software and self-assurance in their ability to use it.

In Education Services we are committed to fulfilling this mission by:

- Offering readily available training.
- Providing innovative and relevant curriculum delivered by accomplished professionals.
- Designing curriculum and training according to instructional models.
- Implementing state-of-the-practice, learner-centered technology, and learning resources.
- Engaging with customers to create an exceptional educational experience.

## How Your Training Works

Your SirsiDynix Symphony training is delivered as either instructor-led distance training through the Internet using Webex<sup>®</sup>, or on site with a SirsiDynix trainer.

An important part of our training strategy is to provide you with an online library of training resources, also located at <http://sirsiDynix.webex.com>. These resources are available on demand and include recorded sessions and web-based trainings (WBTs). Recorded sessions give you a quick reference to the look and feel and the functionality of the software. WBTs are accessed through a browser and deliver on-demand instruction so you can learn basic library workflows using SirsiDynix Symphony.

### Prerequisites

We deliver several prerequisite courses as WBTs (see paragraph above). We recommend that you view them as early and as often as you need to. You will need to take these courses before you schedule and participate in any other training sessions:

• Welcome to Training	• Beginning Cataloging
• e-Library (iBistro/iLink) (if this is your OPAC search tool)	• Reports Basics
• Essential Skills	• Beginning Circulation

*System Administrators must take Essential Skills for Sys. Admins. course as a prerequisite.*

## Navigating This Course Catalog

This course catalog is designed to provide you with a comprehensive list of instructor-led trainings. We've created links throughout the catalog for easier navigation. Click on underlined text to take you directly to related information within the catalog.

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## Courses by Job Description

This section lists all of the general ILS courses by job description. Turn to the section most suited to your job function. (If you are viewing an electronic copy, these sections are hyperlinked).

The course catalog lists courses in these job description categories:

### **Administration**

[System Administration](#)

[Policy Administration](#)

[OPAC Administration](#)

### **Public Services**

[Circulation](#)

[Reference](#)

[Children's Department](#)

[Reserve Book Room](#)

### **Technical Services**

[Cataloging and Authority](#)

[Acquisitions](#)

[Serials](#)

[Collection Exchange](#)

You can view [training subscriptions](#) for information about purchasing additional courses that you might need for on-going or refresher training. Training subscriptions are good for a year from the date of purchase and give you an economical way to purchase our high-quality training in bulk at a reduced rate.

# Administrators

## Required Courses before Go-live

- [Essential Skills](#)
- [Report Basics](#)
- [Essential Skills for System Administrators](#)
- All Required Classes for other modules

## Required Courses after Go-live

- [User Configuration and Access Control](#)
- [Administration Reports](#)
- [Cataloging Configuration](#)
- [Circulation Configuration](#)
- [Acquisitions Configuration](#)
- [Serials Configuration](#)
- [Configuring Z39.50 Elements](#)
- [General Configuration](#)
- All Required Classes for other modules

## Special Purchases/Interest Courses

- [Holds Maintenance and Reporting](#)
- [Web-Reporter Suite: Administration Fundamentals](#)
- [Web-Reporter Suite: Desktop Reporting Fundamentals](#)
- [Director's Station: Administration](#)
- [Docutek ERes Manager](#)
- [URSA Administration](#)

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## Public Services Staff

### Required Courses before Go-live

- [Essential Skills](#)
- [Basic Circulation](#)
- [Intermediate Circulation](#)
- [Report Basics](#)
- [Offline](#) (only if going live in offline mode)
- [StaffWeb End User](#) (browser-based, separate purchase)
- [StaffWeb Administration](#) (browser-based, separate purchase)

### Required Courses after Go-live

- [Offline](#)

### Special Purchases/Interest Courses

- [Requests](#)
- [Holds Maintenance and Reports](#)
- [Academic Reserves](#)
- [Outreach](#)
- [Director's Station: Overview](#)
- [Director's Station: End Users](#)
- [Docutek ERes Overview](#)
- [URSA End User](#)
- [PocketCirc](#)

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# Technical Services Staff

## Required Courses before Go-live

- [Essential Skills](#)
- [Basic Cataloging](#)
- [Creating Batch Loading Templates](#)
- [Report Basics](#)

## Required Courses after Go-live

- [Intermediate Cataloging](#)
- [Cataloging Authority Control](#)

## Special Purchases/Interest Courses

- [Cataloging Reports](#)
- [Materials Booking](#)
- [Hyperion](#)
- [Collection Exchange](#)

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## Acquisitions Staff

### Required Courses before Go-live

- [Essential Skills](#)
- [Report Basics](#)

### Required Courses after Go-live

If you go live with the Acquisitions module, these courses must be taken before Go-live:

- [Acquisitions Preparation](#)
- [Acquisitions Ordering](#)
- [Acquisitions Receiving and Processing](#)
- [Acquisitions Reports](#)
- [Acquisitions Configuration \(Supervisors/System Administrators\)](#)

### Special Purchases/Interest Courses

- [MARC Order Loader](#)
- [EDI](#)
- [Acquisitions Selection Lists](#)

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# Serials Staff

## Required Courses before Go-live

- [Essential Skills](#)
- [Report Basics](#)

## Required Courses after Go-live

If you go live with the Serials module, these courses must be taken before Go-live:

- [Serials Control](#)
- [Serials Check-in](#)
- [Serials Configuration and Reports](#) (Supervisors/System Administrators)

## Special Purchases/Interest Courses

- None at this time

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## OPAC Administrators

### **e-Library (formerly iBistro/iLink)**

- [e-Library: Configuring Gateway Elements](#)
- [e-Library: Working with Environment Variables](#)
- [e-Library: Working with Images, Labels, and Messages](#)

### **Enterprise Administration**

- [Administration Part 1](#)
- [Administration Part 2](#)
- [Administration Part 3](#)
- [Searching Part 1](#)
- [Searching Part 2](#)
- [Searching Part 3](#)

### **EPS Rooms Builder**

- [101-level class \(intro and navigation\)](#)
- [102-level classes \(content modules\)](#)
- [103-level class \(technical overview\)](#)
- [EPS Rooms Builder Administration](#)
- [EPS Rooms Manager](#)

### **SchoolRooms Builder**

- [SRB101es—SchoolRooms for Elementary Schools](#)
- [SRB101hs—SchoolRooms for High Schools](#)
- [SRB101ms—SchoolRooms for Middle Schools](#)

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# Course Descriptions and Training Objectives

This section is an alphabetical listing of the available ILS trainings, divided into four sections:

- [ILS Course Descriptions \(online\)](#)
- [Practice Sessions](#)
- [OPAC Administration](#)
- [Onsite](#) (if onsite differs from the corresponding distance agenda)

## Course Description: ILS

### Academic Reserves (3-hour course)

Learn to manage items in your library's reserve collection. These materials usually circulate to students for shorter loan periods and are searchable by course name, course ID, or instructor name.

After completing this course, you will be able to:

- Create the components of a reserve record.
- Distinguish between instructor (users), course, item and reserve records.
- Understand the concepts of status/stage/item status combinations.
- Schedule reports to automate returning and collecting reserve desk items.
- Navigate and retrieve appropriate topics from the WorkFlows online help file.
- Understand Reserves policies.

### Acquisitions Configuration (3-hour course)

Learn the properties of the Acquisitions wizards, as well as the policies used in the module. Acquire the knowledge necessary to create or modify holding codes, fund levels, and order maps in SD Symphony.

After completing this course, you will be able to:

- Configure holding code policies.
- Create and modify fund level policies.
- Understand order type policies.
- Create order maps.
- Modify wizards (behaviors, defaults and helpers) for optimum workflow.



## **Acquisitions Ordering (3-hour course)**

Learn how to create different order types in SD Symphony, focusing on firm, subscription, and standing orders.

After completing this course, you will be able to:

- Set session settings.
- Create all three order types in SD Symphony: basic, dated, and recurring
- Display, maintain, duplicate, and delete orders

## **Acquisitions Preparation (3-hour course)**

Learn the steps necessary to create and maintain the records that need to be in place before creating an order record in SD Symphony. These records include title, fund and vendor records.

After completing this course, you will be able to:

- Set session settings.
- Understand the different ways to add titles as they relate to acquisitions.
- Understand fund and vendor record structures.
- Add fund records and maintain fund information.
- Create vendor records and maintain vendor information.
- Use wizard helpers to report fund and vendor activity.

## **Acquisitions Receiving and Processing (3-hour course)**

Learn to receive and load orders, create and pay invoices, and create manual claims and cancellations in SD Symphony.

After completing this course, you will be able to:

- Receive orders.
- Create invoices.
- Pay invoices.
- Load the order.
- Create manual claims and cancellations.

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## **Acquisitions Reports (3-hour course)**

Learn to use the available Acquisitions reports. The course covers reports that produces lists, generate claim notices, and print purchase orders in SD Symphony.

After completing this course, you will be able to:

- Identify and utilize the wizards on the Reports toolbar.
- Determine appropriate report type to use for needed information.
- Print purchase orders with reports.
- Generate claims with reports.
- View and interpret report logs.
- Use the WorkFlows online help

## **Acquisitions Selection Lists (2-hour course)**

Learn to create lists and make buying decisions against those selection list items. Once the decisions are made, Workflows converts the list into order records.

After completing this course, you will be able to:

- Create selection list control records and link the line records to titles in the catalog.
- Make purchasing decisions.
- Convert selected materials into orders.
- Use a batch process to create lists and orders.
- Run the Load Bibs for Selection report.
- Run the Load Bibs with Selections and Decisions report.
- Run the Load Flat Selection Records report.

## **Administration Reports (3-hour course)**

Learn how to run statistical reports, scan history logs, remove users and items with reports, and run and monitor the required maintenance reports in SirsiDynix Symphony.

After completing this course, you will be able to:

- Identify and utilize the wizards on the Reports toolbar.
- Schedule and run reports.
- Create a report template.



- Run and monitor required maintenance reports.
- Produce statistical reports.
- Scan history logs.
- Run reports for proper holds maintenance.
- Remove users and remove items.
- Interpret report logs/results and identify errors.
- Use the WorkFlows online help.

## **Basic Cataloging—WBT**

Learn how to perform basic cataloging functions such as manually adding bibliographic records, creating call number and item records, loading bibliographic records in batch, deleting records from the catalog, and importing records using SmartPort.

After completing this course, you will be able to:

- Load records from other catalogs using SmartPort
- Create, modify and delete call number records
- Create, modify and delete item records
- Load bibliographic records in batch using a template.

## **Basic Circulation—WBT**

Learn circulation skills such as creating user records, checking items in and out, renewing items, and creating and paying bills in SD Symphony.

After completing this course, you will be able to:

- Register users.
- Modify users.
- Use lookup options for user records.
- Check out material to users.
- Discharge/check in materials.
- Renew materials.
- Create and pay bills.

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## **Cataloging Authority Control (3-hour course)**

Learn how to find, create and modify authority records within SD Symphony.

After completing this course, you will be able to:

- Understand authority databases, indexes and thesauri
- Add/modify authorities
- Validate authorities
- Perform other basic actions related to authority control
- Load and view the Authority Records report

## **Cataloging Configuration (3-hour course)**

Learn how to modify catalog format policies and create new holding codes, in SD Symphony.

After completing this course, you will be able to:

- Understand the catalog format policies.
- Manipulate entry ID's for display and indexing.
- Understand the keyword index.
- Understand the holding code policy.
- Create/modify classification policies.
- Understand item category policies.

## **Cataloging Reports (3-hour course)**

Learn how to set up and run bibliographic reports, schedule reports to run regularly, as well as view, print, email, and grant ownership of reports.

After completing this course, you will be able to:

- Set up reports
- Save reports as templates (reusable).
- Schedule reports to run regularly.
- Give ownership of reports to others.
- View, print, or email reports
- Remove reports.

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## **Circulation Configuration (3-hour course)**

Learn how to manipulate policies, such as loan periods, billing structures and hold maps, based on local practices. The course includes an overview and definitions of all the policies necessary for circulation.

After completing this course, you will be able to:

- Create item type policies.
- Create bill reason and unsuspend reason policies.
- Understand the billing structure policy.
- Understand the loan period policy.
- Create a circulation rule policy
- Understand the policies that make up the circulation map lines. Also, understand the role of the circulation map and how to make changes to it.
- Create payment type policy.
- Understand the hold map policy.
- Create and modify default price policy.

## **Collection Exchange (4-hour course)**

Collection Exchange training is designed to provide you with an advanced understanding of the Collection Exchange module configuration and workflow. This course is intended for staff that participates in the collection exchange process and for staff that will configure the collection exchange.

After completing this course, you will be able to:

- Maintain and update branch quota
- Add items to the “shared collection”
- Know how a branch can keep an item in their local collection
- Manage the exchange process
- Manage and exchange sets
- Run Collection Exchange reports.

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## **Configuring Z39.50 Connections (2-hour course)**

Learn how to create new Z39.50 connections which can be used by cataloging staff to obtain bibliographic records via the SmartPort wizard. These connections can also be used by patrons to search in the OPAC.

After completing this course, you will be able to:

- Create links to various Z39.50 servers.
- Use the WorkFlows online help.

## **Creating Batch Loading Templates (WBT)**

Learn to create templates to be used by staff when loading bibliographic records to your catalog in batch (from a disk or file).

After completing this course, you will be able to:

- Load bibliographic records from a PC to the server
- Create a template to load records from the server into the catalog

## **Director's Station Administration (2-hour course)**

Learn to create the necessary logins and establish user access for those who will be using Director's Station. Administrators learn how to manage security and change delivered features in the software. This course also teaches how information is brought over from WorkFlows to the Director's Station server and how to troubleshoot possible issues when the transformation or processing of this data occurs.

After completing this course, you will be able to:

- Navigate the Director's Station interface.
- Create groups that will apply to all users.
- Create users.
- Assign user access.
- Create a default template for users.
- Understand how data is loaded and processed in Director's Station.
- Add, edit and delete items globally within the Manage Menu application of Director's Station.

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## **Director's Station End User (3-hour course)**

Learn to generate customized reports, calculate new values and measures in those reports, create charts and alerts based on reports, to better analyze library information. Also covered are the different ways of disseminating this information through printing, emailing, and exporting of the data.

After completing this course, you will be able to:

- Customize and navigate the Director's Station interface.
- Create reports to analyze data.
- Use lookup and sorting features within reports.
- Create title lists within reports.
- Use the calculator to create new dimensions within reports.
- Create charts based on report data.
- Manipulate the appearance of charts.
- Create alerts.
- Add, edit, and delete My Folder items within Director's Station.

## **Docutek ERes Manager (2-hour course)**

The Docutek ERes Manager course teaches participants the configuration and administration of the Electronic Reserves module.

After completing this course, you will be able to:

- Describe differences between Faculty, Librarian, and Manager access permissions.
- Create accounts and account groups.
- Manage Course Reserve pages.
- Manage copyright settings.
- Add departments.
- Customize the Home page.
- Maintain Internet Resources organized by department.
- Post announcements.
- Manage a list of publishers to streamline copyright management.
- Run statistics reports.

## **Docutek ERes Overview (1-hour course)**

Learn the components of the Electronic Reserves interface, including how to navigate the interface, and post and access the reserve materials.

After completing this course, you will be able to:

- Navigate the ERes web site.
- Search for Course Reserves pages.
- Access documents and other resources through the Course Reserves page.
- Create Course Reserves pages.
- Attach/post documents to Course Reserves pages.
- Access the online Help file and training videos to answer questions after this training session.

## **EDI (Electronic Data Interchange)—WBT**

Learn the process used to communicate electronically with vendors. Libraries can send purchase orders, invoices, and serials claims to vendors using reports in SD Symphony.

After completing this course, you will be able to:

- Add the library's standard address number.
- Create an EDI purchase order and invoice.
- Work with EDI transactions using the EDI Manager wizard.
- View the status of each outgoing and incoming transaction and remove transaction files.
- Understand serials claiming and EDI serials claiming.

## **Essential Skills—WBT**

Learn to navigate WorkFlows and search for items using different operators and strategies. This course is a pre-requisite for all other SD Symphony classes.

After completing this course, you will be able to:

- Log In to WorkFlows
- Navigate the WorkFlows client.
- Search the catalog and search for users
- Use WorkFlows online help.



## Essential Skills for System Administrators—WBT

Learn how to change properties, customize toolbars, create overrides, customize policy lists and use format wizards. This course covers the most common, essential tasks of a SD Symphony system administrator.

This course is divided into four parts, as outlined below. After completing this course, you will be able to:

- Perform required Maintenance—Learn to maintain your catalog through required maintenance reports.
- Properties and Toolbars—Learn to customize and assign properties and toolbars for your library/staff.
- Overrides and Customize Policy Lists—Learn to create overrides for both functions and “locked” wizards, as well as customize the lists seen by staff (payment options/bill reasons)
- Format Policy wizards—Learn how to utilize a wizard template that is used by more than 21 wizards in the Configuration module.

### General Configuration (3-hour course)

Learn how to install WorkFlows, create location policies, make changes to fields within the library policy and change global policies in SD Symphony.

After completing this course, you will be able to:

- Install and configure WorkFlows.
- Understand the fields of the library policy and how they affect WorkFlows.
- Create new locations for items.
- Assign libraries to a virtual group for searching purposes.
- Assign libraries to a virtual group for circulation (and other) purposes.
- Change Global configuration policies.

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## **Holds Maintenance and Reporting (3-hour course)**

The Holds Maintenance and Reporting course instructs library staff in how to run reports to create holds lists, remove inactive holds from the system, create notices to inform users of holds, and gather statistics regarding holds. Learn the holds-specific workflows and how to run the accompanying reports.

After completing this course, you will be able to:

- Set up and run holds maintenance reports
- Correct reported errors
- Create holds notice reports
- Gather and run holds statistics

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## **Hyperion (3-hour course)**

The Hyperion course teaches participants how to manage a digital archive collection. Participants will learn how to organize the materials and make the digital images viewable to the public.

After completing this course, you will be able to:

- Search for resources in WorkFlows and the OPAC.
- Display, create, modify, move and delete resources.
- Attach images to resource records from the local PC and from the server.
- Link bibliographic records to images.
- Index PDFs, text files and HTML files (if Full Content Searching is purchased).
- Create the necessary Hyperion configuration policies.
- Configure e-Library to include the Hyperion search; or create the URL to connect to Hyperion from other OPAC products.
- Run reports on Hyperion data.

## **Intermediate Cataloging (3-hour course)**

Learn cataloging functions including editing existing catalog data, reviewing files that may not have loaded properly during batch loads, binding, merging/transferring items and creating templates for spine and pocket labels.

After completing this course, you will be able to:

- Identify and utilize the wizards on the Cataloging toolbar.
- Import bibliographic records into the SirsiDynix Symphony catalog via reports.
- Create templates for spine and pocket labels
- Transfer titles
- Bind titles

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## **Intermediate Circulation (3-hour course)**

Learn circulation functions such as placing and maintaining holds & recalls, marking items missing, lost or claims returned, adding brief title and item records, and managing transit items.

After completing this course, you will be able to:

- Modify and remove holds.
- Display holds information on item and user records.
- Change an item ID.
- Mark items Missing, Lost, and Claimed Returned
- Mark an item used.
- Check out ephemeral items.

## **Label Designer—Recorded Session**

Learn to create labels within WorkFlows. After completing this course, you will be able to:

- Create labels for items
- Modify labels
- Print labels

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## **MARC Order Loader/9xx (2-hour course)**

Learn to load orders placed directly with vendors into WorkFlows. After completing this course, you will be able to:

- Identify and understand the steps needed to prepare for/MARC Order Loading/ 9XX.
- Use the MARC Order Import Utility wizard.
- Run the Load Bibs with Order Info report.
- Run the Load Flat Order Records report.

## **Materials Booking (3-hour course)**

Learn to manage items in the library's collection available to reserve for future use. Participants learn the process for managing these items including preparation, delivery, use, and the return of booked items.

After completing this course, you will be able to:

- Create the appropriate records necessary for the booking and circulation of library materials.
- Create and maintain a booking calendar.
- Circulate booked items.
- Produce reports to count and list bookings, to create pull lists and to notify patrons.
- Establish the necessary policies to create a media desk, define booking profiles for items and determine shipping schedules.

## **Offline Circulation—Recorded Session**

The Offline Circulation course teaches participants how to complete circulation transactions when access to the SD Symphony server is unavailable. The process of loading the transactions into WorkFlows when backing up the server is also covered.

After completing this course, you will be able to:

- Checkout, discharge and renew items in Offline Circulation mode
- Register users in Offline Circulation mode
- Load Offline transactions into WorkFlows (admin access required)

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## **Outreach (3-hour course)**

Learn to manage items in the library's collection available to patrons who cannot make use of the traditional circulation services. Participants will learn how to select materials and deliver/ship items to outreach patrons.

After completing this course, you will be able to:

- Create, display, edit, and remove outreach user records.
- Create, edit, and remove outreach interest templates.
- Create, display, modify, and remove outreach history information.
- Produce reports that count and list outreach user records, set delivery and skip dates, print pickup and delivery slips, and purge specified outreach users, users' history information, or users' logs.
- Navigate and retrieve appropriate topics from the WorkFlows online help file.

## **PocketCirc**

PocketCirc is a hand-held device that allows you to continue Circulation operations on your wireless network. You can perform functions in online mode (via a wireless network); or, you can perform circulation functions in offline mode when your normal system is down.

After completing this course, you will be able to use PocketCirc to:

- Perform online tasks (starting, logging in, CKI, CKO, Mark Item Used).
- Perform standard Checkin and Checkout
- Execute offline use
- Conduct Inventory

## **Report Basics—Recorded Session**

The Report Basics class teaches participants the basics of setting up and scheduling reports. The course specifically focuses on using select criteria to restrict result sets, scheduling reports and shows examples of count, list, notice and statistics reports. This course is recommended as a prerequisite to most other courses. It will be assumed as reports are run in those classes that the user is familiar with report basics.



## **Requests (2-hour course)**

Learn to create, display, modify and remove requests with wizards and to run reports to list and remove requests in SD Symphony.

After completing this course, you will be able to:

- Create, display, modify and remove requests.
- Submit requests through e-Library.
- Create a list of requests through reports.
- Remove request records through reports.

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## **Rollovers for Acquisitions (3-hour course)**

Learn the process needed to rollover funds, vendors and orders at the end of the fiscal cycle.

After completing this course, you will be able to:

- Define what a rollover is and why it needs to happen.
- Identify what kinds of records can be rolled over and which reports can make that happen 'in batch'.
- Identify what needs to be done before you rollover records.
- Identify what needs to be done after you rollover records.
- Identify alternatives to using reports for the rollover process.

## **Serials Check-in and Claiming (3-hour course)**

Learn to check in issues of serials, correct check-in errors and create claims in SD Symphony.

After completing this course, you will be able to:

- Identify and utilize the wizards on the Serials toolbar.
- Check in issues of periodicals under different circumstances
- Check in issues in a centralized serial department.
- Un-receive items and correct check-in errors.
- Create manual claims and claims via reports.

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## **Serials Configuration and Reports (3-hour course)**

Learn about the different available serial policies and how to make modifications to them in SD Symphony. You will also learn to create or modify holiday, pattern and serial control category policies. You will learn to use the available serials reports that produce lists, create claims, and generate claim notices in SD Symphony.

After completing this course, you will be able to:

- Understand chronology and chronology type policies.
- Configure frequency, holiday, and label policies.
- Understand serial pattern policies.
- Create serial control category policies.
- Generate claims with reports.
- Produce claim notices.
- View and interpret report logs.

## **Serials Control Records (3-hour course)**

Learn to create serial control records, create a basic prediction and understand the record relationships that help manage the status and receipt of the serial collection.

After completing this course, you will be able to:

- Identify and utilize the wizards on the Serials toolbar.
- Understand the record relationships of the control record.
- Create and modify serial control records.
- Understand the importance of the pattern information in a control record.
- Create and update MARC holdings records.
- Create a basic prediction record.
- Create routing records.

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## **StaffWeb End User (3-hour course)**

SirsiDynix StaffWeb is a web-based product available to all libraries on Unicorn GL3.1 or SirsiDynix Symphony. Libraries use StaffWeb to perform circulation, cataloging, reports, and administration tasks without requiring the configuration of complex client software on a workstation. After the SirsiDynix StaffWeb installation file has been installed on the library server, the staff can use an Internet browser on their workstations to access the library server and perform library tasks and transactions.

After completing this course, you will be able to:

- Log into StaffWeb
- Navigate StaffWeb
- Access online Help
- Perform basic circulation functions
- Perform basic cataloging functions
- Access and run basic reports.

## **StaffWeb Administration (2-hour course)**

You must have an administrative login to Unicorn GL3.1 or to Symphony to administer StaffWeb. Administrative tasks for StaffWeb are split between StaffWeb and the Unicorn GL3.1 or Symphony client.

After completing this course, you will be able to:

- Configure and maintain your server
- Conduct StaffWeb station setup
- Set up printing and notices functionality
- Build templates in StaffWeb
- Configure Java Workflows

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## **URSA Administration (4-hour course)**

Learn URSA administration tasks such as creating staff logins, managing borrowing sequences, and configuring the user portal. You will learn to work with settings that affect both the staff member and patron.

After completing this course, you will be able to:

- Create staff logins tied to particular agencies and security groups
- Understand roles assigned to security groups
- Locate and modify address information within agency policies
- Assign loan fees for patron request transactions
- Determine what member libraries can perform lending and borrowing tasks
- Assign tiers of libraries that will fulfill item requests
- Dictate search fields used within the user portal
- Work with Reciprocal Borrowing users and policies (if applicable)

## **URSA End User (3-hour course)**

Learn URSA workflow skills used by borrowers, such as registering users, search for materials, and placing requests, and by staff, such as managing all aspects of the request cycle.

After completing this course, you will be able to use the URSA Information Portal and URSA Staff Client to:

- Register URSA users.
- Search for materials.
- Place requests for materials.
- Manage automated and mediated requests.
- Perform all needed loaning and borrowing tasks.
- Monitor and cancel requests.
- Handle unfillable requests.

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## **User Configuration and Access Control (3-hour course)**

Learn how to configure user access, including managing operator policies, user profile policies and user access policies. In addition, the course covers station policies, staff logins and global policies that affect access control.

After completing this course, you will be able to:

- Control user access to toolbars, wizards and reports.
- Establish operator policies, including overrides and temporary wizard access.
- Define user profile policies
- Establish policies for user categories, addresses and extended information
- Establish station policies.
- Establish global policies for user information.

## **Web Reporter Administration Fundamentals (3-hour course)**

Learn to administer Web Reporter. The course includes discussions of security, caching, scheduling, and monitoring the Web Reporter system.

After completing this course, you will be able to:

- Use the available monitors to keep an eye on your system.
- Create groups and users on your system.
- Assign appropriate functions to users and groups.
- Use object level security to control access to specific folders and reports.

## **Web Reporter Desktop Fundamentals (6-hour course)**

Learn to use the Desktop client interface to create, edit and delete reports, filters and prompts.

After completing this course, you will be able to:

- Create a new report.
- Add filters and prompts to a report.
- Create new filters and prompts.
- Format reports.
- Add subtotals to a report.

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## **So You've Purchased Web Reporter, Now What? (2-hour course)**

The So, You've Purchased Web Reporter, Now What? course teaches participants to run, create and customize reports using the Web Reporter web browser interface. After completing this course, you will:

- Be familiar with terminology.
- Review the Interface.
- Review metrics and objects
- Learn about various report types
- Review subscribing
- Learn about exporting, sorting, and printing.

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## Course Descriptions: Practice Sessions

### Academic Reserves Practice Session

The Academic Reserves hands-on practice session provides users with an opportunity to participate in hands-on reserves exercises. These sessions are monitored by a trainer who can answer questions, but are not formal training sessions.

### Acquisitions Practice Sessions

The Acquisitions hands-on practice sessions provide users with an opportunity to participate in hands-on acquisitions exercises. These sessions are monitored by a trainer who can answer questions, but are not formal training sessions.

### Administration Practice Sessions

The Administration hands-on practice sessions provide users with an opportunity to participate in hands-on administration exercises such as policy creation. These sessions are monitored by a trainer who can answer questions, but are not formal trainings.

Three labs are available to meet your specific needs:

- SD Symphony Administration (Circulation & General) - For those who have taken: Circulation Configuration and/ General Configuration
- SD Symphony Administration (Reports, Cataloging & Z39.50) - For those who have taken: Administration Reports, Cataloging Configuration, and/ Z39.50 Configuration
- SD Symphony Administration (User Configuration and Access) - For those who have taken: User Configuration & Access Control

### Cataloging Practice Session

Fulfill hands-on cataloging exercises in this structured (but open to your own level of practice and detail) class. These sessions are monitored by a trainer who can answer questions, but are not formal training sessions.

### Circulation Practice Session

Fulfill hands-on circulation exercises in this structured (but open to your own level of practice and detail) class. These sessions are monitored by a trainer who can answer questions, but are not formal training sessions.

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## **Reports Basics Practice Session**

The Report Basics hands-on practice session provides users with an opportunity to participate in exercises involving setting up and running reports. These sessions are monitored by a trainer who can answer questions, but are not formal training sessions.

## **Serials Practice Session**

The Serials Control hands-on practice session provides users with an opportunity to participate in hands-on serials exercises. These sessions are monitored by a trainer who can answer questions, but are not formal training sessions.

## **e-Library (formerly iBistro/iLink) Practice Session**

The e-Library hands-on practice session provides users with an opportunity to participate in hands-on e-Library searching exercises. These sessions are monitored by a trainer who can answer questions, but are not formal training sessions.

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## Course Descriptions: OPAC Administration

### Enterprise Administration (3 recorded sessions)

Learn the administrative details of setting up Enterprise. This course is for system administrators or other library personnel specifically tasked with setting up and profiling Enterprise.

After completing this course, you will be able to:

- Manage users.
- Manage library limits.
- Manage profiles.
- Manage themes.
- Manage content.
- Manage item display codes.

### Enterprise Searching (3 recorded sessions)

Learn how to conduct your OPAC searching using Enterprise. (Enterprise is a front end to your OPAC).

After completing this course, you will:

- Be familiar with the basic features and functions of Enterprise searching.
- Learn how to conduct a variety of searches using Enterprise.
- Learn about multiple search options and facets of Enterprise searching.
- Learn about detailed display features.

### Enterprise Fundamentals (3-hour course)

The Enterprise Fundamentals course is designed for libraries that feel they would like a little extra hand-holding (beyond the recorded sessions offered). This class is typically scheduled on-demand through your project manager.

After completing this course, you will be able to:

- Manage the administrative elements of Enterprise.
- Conduct a variety of searches using Enterprise.
- Understand various Enterprise search options, facets, and display features.

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## EPS Admin Tool

The EPS Admin Tool and the EPS Builder are similar, except that the Builder includes functionality to copy or add Rooms that the Admin Tool lacks. This course is an introduction to the tools available within the Admin Tool and Builder with emphasis on how to manipulate content modules within Rooms. Detailed instructions are provided on each of the buttons used in the Room Editor to copy/replace, edit, move, delete, or add content modules to the columns in Rooms, including how to search for already existing content modules. The skills needed to use the Date feature to set and test the dates content modules appear to the public are also detailed in this session.

After completing this course, you will be able to:

- Access the Admin Tool and Builder.
- Explain the general uses of each of the tools on the Builder Bar.
- Use each of the buttons found in the Room Editor to copy/replace, edit, move, delete, add, or change skins on content modules.
- Use the Date feature to limit the dates content modules appear to the public and test those dates to make sure they are set properly.
- Search for already existing content modules so you can edit and/or include them wherever you might want to add them.

## EPS Room Manager

The Room Manager course details the steps needed to create new Rooms, copy existing Rooms (these first two features are available with Builder, but not with the Admin Tool), move Rooms, delete Rooms, change the visibility of Rooms (allowing access to the room to everyone, only users who log in, or hiding them from everyone) and changing Room properties.

After completing this course, you will be able to:

- Create new Rooms.
- Copy existing Rooms.
- Change visibility of Rooms.
- Change properties of Rooms.
- Move Rooms.
- Delete Rooms.

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## EPS RoomsBuilder

The Rooms Builder course consists of recorded sessions in three groupings:

- EPS101 consists of three classes: 1) a navigation and overview; 2) searching outside resources; and 3) searching your catalog. These recordings are free.
- EPS102 consists of 25 separate courses, each focusing on the building of a specific type of content module. These sessions are considered optional, are of a more advanced nature, and are fee-based. Each EPS 102-level course provides detailed instruction on one or two content modules. This content module-specific training makes it easier to locate desired information. These sessions are suitable for users of EPS/Rooms and SchoolRooms alike.
- EPS103 is a technical overview of the configuration, policy, XML, Velocity templates, skins, and other files used to customize EPS/Rooms and SchoolRooms. This is a general overview but also a very technical training; it is best suited for individuals who are comfortable with HTML, CSS, XML, XSL, and Velocity templates. There is a fee for these recordings.

After completing this course, you will be able to:

### EPS101

- Navigate through Rooms, accessing and understanding the function of component parts.
- Successfully search outside resources for content.
- Successfully search your catalog for content.

### EPS102

- Depending on the courses selected:
- Create, modify, copy and delete rooms.
- Create content for rooms.
- Configure search options for rooms.
- [Click here for a course description list of EPS 102 content modules.](#)

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## **EPS103**

- Change skins color in rooms and content modules.
- Create, modify, copy and delete rooms.
- Create content for rooms.
- Configure search options for rooms

### **e-Library (formerly iBistro/iLink)—Configuring Gateway Elements**

Learn to create new gateway elements, hide existing ones, change search preferences and create booklists in e-Library.

After completing this course, you will be able to:

- Understand the different types of gateway elements available in the Gateway Database Configuration.
- Create new gateway elements.
- Hide gateway elements from public view.
- Change the search presentation and add indexes to OPAC searches.
- Create booklists manually and using reports.
- Activate the “Have You Read” booklist.
- Modify Best Sellers and Recommended Reading lists.

### **e-Library (formerly iBistro/iLink)—Working with Environment Variables**

Learn to customize the appearance of the e-Library interface, as well as how to create an environment to test the variables before making the changes available for the public to view.

After completing this course, you will be able to:

- Configure different environment files to customize the e-Library interface for different users.
- Understand the e-Library directory structure.
- Create a test environment.

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## **e-Library (formerly iBistro/iLink)—Working with Images, Labels, and Messages**

Learn to add your own images such as a library logo in e-Library. Participants will also learn how to customize the labels used in e-Library.

After completing this course, you will be able to:

- Understand the e-Library directory structure.
- Work with custom images.
- Work with labels and messages.

## **SchoolRooms Builder**

The SchoolRooms Builder training consists of 4 recorded sessions: SRB101 School Rooms Builder, SRB101es (elementary schools), SRB101ms (middle schools), and SRB101hs (high schools). These classes are viewable from <http://sirsidynix.webex.com>. These classes teach participants how to create, edit and delete rooms in a school setting. In addition, participants will learn to change skin colors in rooms and content modules, create content for rooms, and configure search options for rooms in the builder.

After completing this course, you will be able to:

- Change skins color in rooms and content modules.
- Create, modify, copy and delete rooms.
- Create content for rooms.
- Configure search options for rooms.

## **SchoolRooms Elementary School Builder**

- The SRB 101es provides introductions to SchoolRooms users, emphasizing content and functionality customized specifically for elementary schools.
- After completing this course, you will be able to understand the basic administration of setting up SchoolRooms for an elementary school.

## **SchoolRooms High School Builder**

- The SRB 101hs course provides introductions to SchoolRooms users, emphasizing content and functionality customized specifically for high schools.
- After completing this course, you will be able to understand the basic administration of setting up SchoolRooms for a high school.

## **SchoolRooms Middle School Builder**

- The SRB 101ms course provides introductions to SchoolRooms users, emphasizing content and functionality customized specifically for middle schools.
- After completing this course, you will be able to understand the basic administration of setting up SchoolRooms for a middle school.

## Course Descriptions: Onsite

### Onsite Administration (3-days)

Learn to set up and manage policies for access control, user configuration, general configuration, circulation configuration, cataloging configuration, Z39.50 configuration and run administration reports. After completing this course, you will be able to:

- Run reports for holds maintenance
- Remove users and items.
- Interpret report logs/results and identify errors.
- Understand catalog policies.
- Understand circulation policies.
- Create links to various Z39.50 policies.
- Understand library policies.
- Understand location policies.
- Understand user policies.
- Understand access control policies.

### Cataloging Onsite (1-Day)

Learn to add titles via original cataloging, SmartPort and batch loading. In addition, participants will learn to manage call#/volume and item records, handle authority records, and labels. After completing this course, you will be able to:

- Create, modify, and delete titles using the MARC Editor.
- Capture records from another catalog using SmartPort.
- Load records in batch using the Load Bibliographic Records report.
- Create, modify, delete call number/volume and item records.
- Globally modify item records.
- Create templates for labels.
- Print labels.
- Transfer titles, item and call number/volume records.
- Understand the purpose of authority records.
- Validate authority headings.

## **Circulation On-site Training (1-day)**

The Circulation Onsite class teaches participants to maintain user records, checkout, discharge and renew materials, manage billing, manage holds and recalls, maintain item records, and handle items in transit.

After completing this course, you will be able to:

- Create, modify, delete, maintain user records.
- Checkout items.
- Modify due dates.
- Discharge (check-in) items.
- Manually generate bills.
- Manage payment, waiver of bills.
- Place holds.
- Modify, delete holds.
- Trap on-shelf holds.
- Add brief title and item records.
- Mark items lost, missing, claims returned.
- Replace lost card for users.
- Replace lost barcodes on materials.
- Receive in-transit items.

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## Offline Circulation and Requests (1/2-day)

Learn to use offline circulation and manage requests.

After completing this course, you will be able to:

- Access offline circulation mode.
- Register users in offline mode.
- Check out, discharge and renew items in offline mode.
- Load offline transactions and review the report log.
- Create, display and modify requests.
- Run the List Request Records report.
- Reply and view replies to requests.
- Run request reports.

## Reports Basics—(1/2-day)

The Report Basics class teaches participants the basics of setting up and scheduling reports. The course specifically focuses on using select criteria to restrict result sets, scheduling reports and shows examples of count, list, notice, and statistics reports.

When taught onsite, this class will cover the details of Circulation Notices. For distance training, Report Basics and Circulation Reports and Notices are separate classes.

After completing this course, you will be able to:

- Customize a report by using selection criteria to restrict the result set to desired data.
- Set session defaults.
- Save reports as templates for future use.
- Schedule reports to run at specified frequency and intervals.
- Use search strings.
- Modify/copy/remove/suspend scheduled reports.
- Become familiar with the variety of count, list, notice and statistics reports available.

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## **Serials Onsite (1-day)**

The Serials Onsite class teaches participants to create vendors, add titles, create serial control records, establish prediction patterns, set OPAC display options, check-in issues, create claims, correct check-in errors, maintain MARC holdings.

After completing this course, you will be able to:

- Create vendor records.
- Create title records.
- Create serial control records.
- Establish enumeration and chronology.
- Create publication (prediction) patterns.
- Manage MARC holdings records.
- Route serials.
- Check-in issues.
- Generate claims.
- Correct check-in errors.
- Maintain MARC holdings records.
- Run required reports.

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## Acquisitions On-site (2 days)

Learn to manage funds, vendors, and conduct the ordering, receiving, invoicing, claiming and loading of records.

After completing this course, you will be able to:

- Create, modify, delete funds and fund cycles.
- Create, modify, delete vendors.
- Set properties for adding titles.
- Identify different types of orders.
- Create, modify, delete all types of orders.
- Receive batch orders
- Receive standing orders.
- Receive blanket orders.
- Create, modify, delete invoices and invoice lines.
- Reverse payment of invoice.
- Load ordered items into the catalog.
- Create, print claims and cancellations.

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# Training Subscriptions

SirsiDynix offers several yearly subscription options that make it easy for you to manage your training needs. You can purchase training subscriptions in any combination and quantity.

These are our current subscriptions:

Subscription	Definition
Yearly eLearning \$2799	The Yearly eLearning subscription provides your library staff with 1 year of unlimited access to every recorded session and web-based training (WBT) we offer (does not include instructor-led classes). This option is a great value to introduce new staff to the products offered by SirsiDynix. It also provides a powerful resource to libraries looking for refresher on the product or as an overview of functionality in new releases.
Value Instructor-led \$1750	This subscription provides a discount approach to purchasing our Webex-delivered instructor-led classes. You purchase a coupon for six classes at a time and we charge you only for five. You can purchase as many subscription sets of 6 as you would like. You have a year from the date of purchase to use your coupons.
Value HOL \$3250	This subscription applies to our instructor-led Hands-on Lab (HOL) courses (where participants have special interactive access to the software). You purchase a coupon for six HOL courses at a time and we charge you only for five. You can purchase as many subscription sets of 6 as you would like. You have a year from the date of purchase to use your coupons.

At SirsiDynix we are diligently working to provide you, our customers, with the highest quality training. We deliver our classes through a variety of methods using the latest technology, ensuring your library staff members are knowledgeable and successful in their day-to-day job responsibilities.

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