

How to prepare your Library for Temporary Closure

Symphony

On occasion, a site may have to suddenly close all or some of their libraries for a period of time due to events such as weather, building maintenance, road construction, natural disaster, medical issues, etc. Among their concerns could be what to do about materials which are charged and how to handle holds.

Library Closed Days

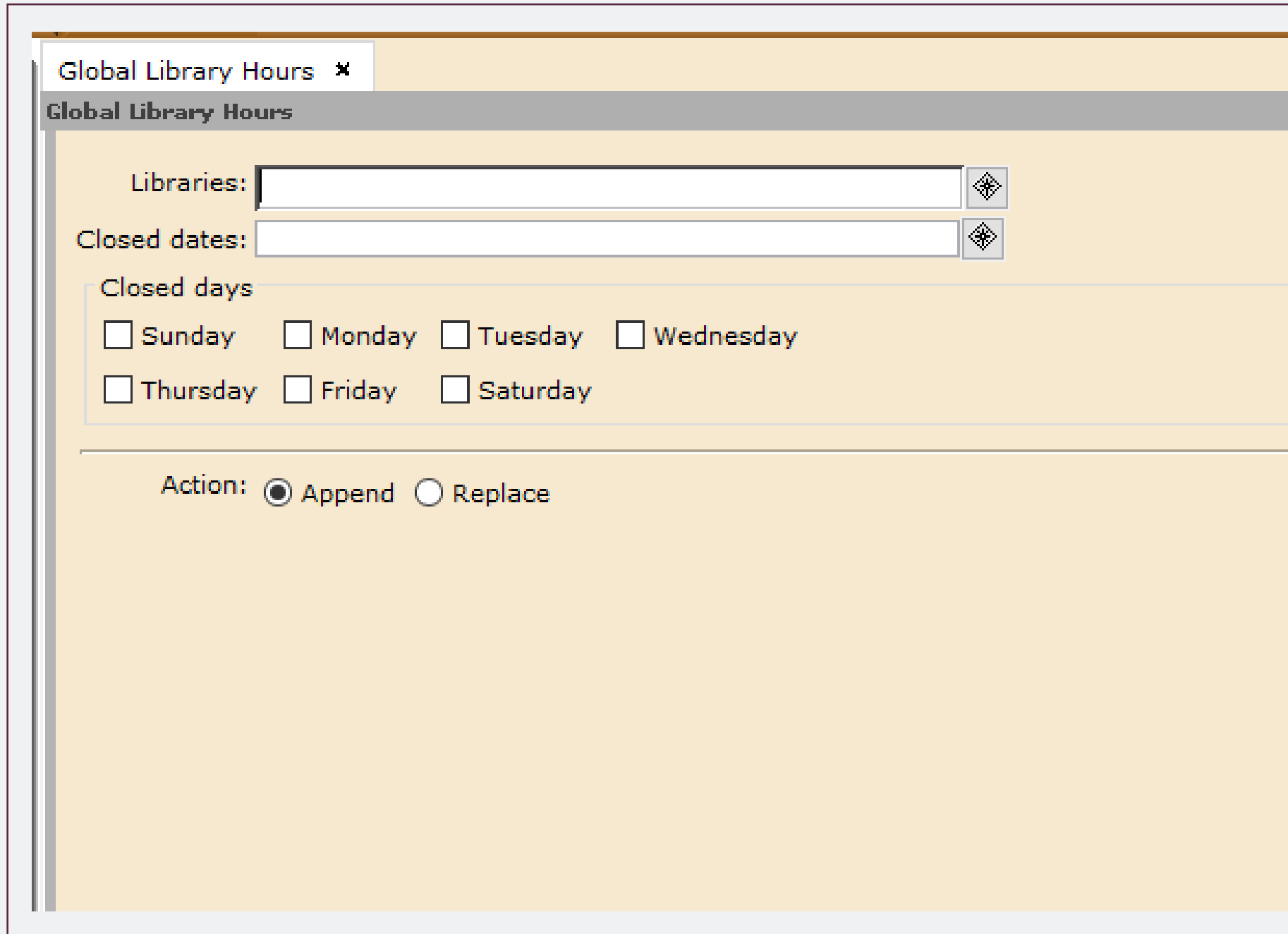
- The first thing that should be done is to set up each of the library(s) that will be closing so that the system knows you will closed on those days. That way charges in the library and renewals performed in the library and remotely will know to avoid setting the due date to be on days you expect to be closed.

Library Closed Days

- The closed dates for a library are found in the circulation tab of each library policy. There are 3 different wizards which can be used to edit these dates.
- The LIBRARY wizard lets you edit all of the different parts of the library policy but may only work on one at a time.
- The LIBRARY CALENDAR wizard lets you edit just the closed days part of the library policy only in the library you are logged into.
- The GLOBAL LIBRARY HOURS wizard lets you edit the closed days part of a number of different library policies all at the same time and is very likely the best choice to use, especially for sites needing to set closed dates for many or all of their libraries. Note this wizard can be just as easily used to change dates for one library so this document will only describe that particular wizard.

Click on the global library hours wizard

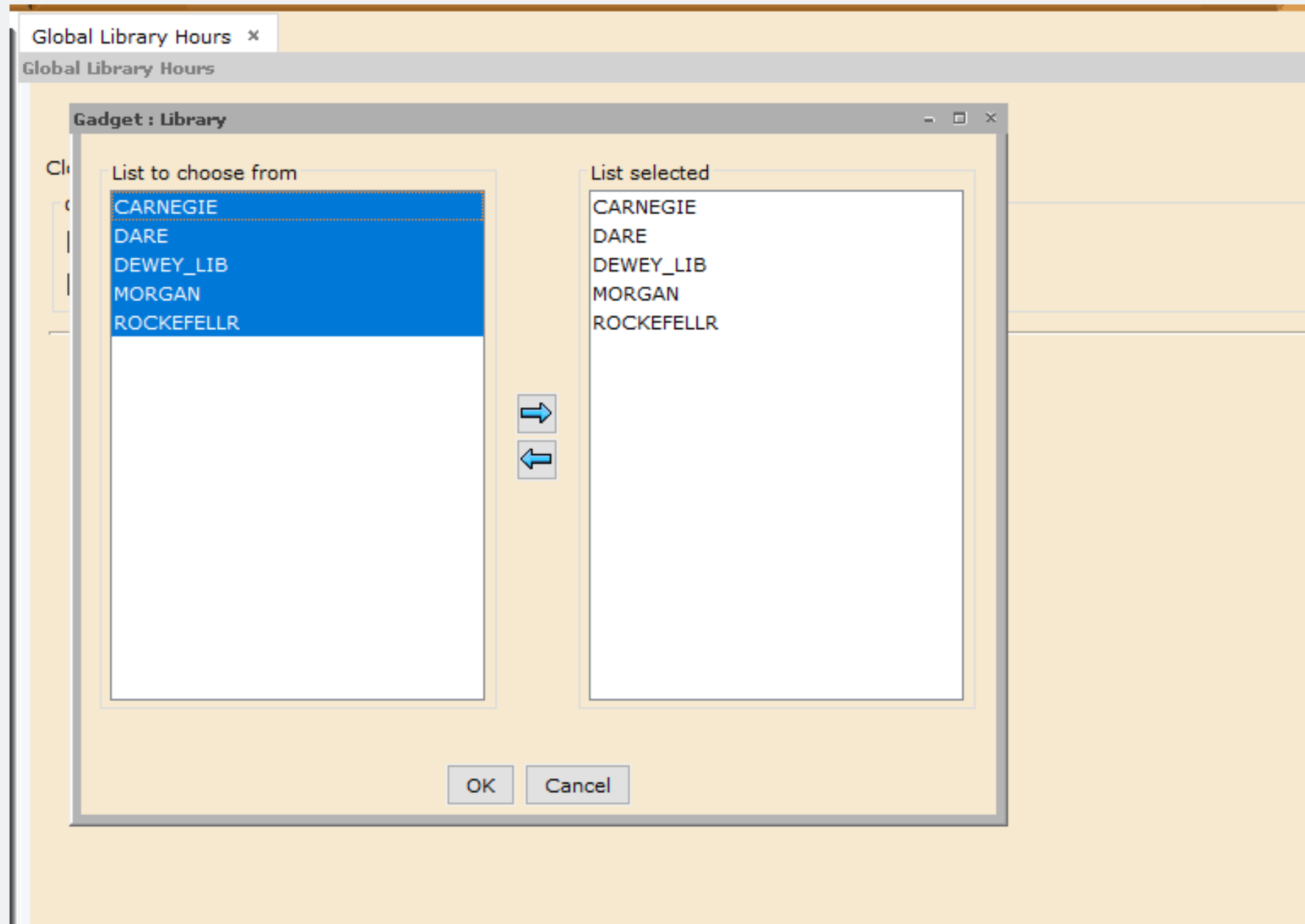
Click on the global library hours wizard found in the general configuration section of the configuration module. The initial screen will look like this:



The screenshot shows a web-based configuration window titled "Global Library Hours" with a close button (X) in the top right corner. The window has a grey header bar with the title "Global Library Hours". Below the header, the main content area is light yellow. It contains the following elements:

- A label "Libraries:" followed by a text input field and a small square icon with a crosshair.
- A label "Closed dates:" followed by a text input field and a small square icon with a crosshair.
- A label "Closed days:" followed by a group of checkboxes for the days of the week:
 - ☐ Sunday
 - ☐ Monday
 - ☐ Tuesday
 - ☐ Wednesday
 - ☐ Thursday
 - ☐ Friday
 - ☐ Saturday
- A horizontal line separating the days section from the action section.
- An "Action:" label followed by two radio buttons: "Append" (which is selected) and "Replace".

First click on the gadget for the libraries line and choose which library(s) you want to update then click on OK. Here all of the libraries have been selected, but you could just close one of some of the libraries if needed. Just include the libraries you want to set these closed days for in the list selected column.



Next click on the gadget

Next click on the gadget next to the closed dates, choose the first day of the closure in the closed from window on the left and the last day of the closure in the until window on the right then click on the ADD button. (Here we anticipate a closure from 11 March 2020 to 15 April 2020), then click on OK.

Global Library Hours x

Global Library Hours

Gadget : Closed Dates

Closed from

← March 2020 →

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Until

← April 2020 →

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Closed Dates

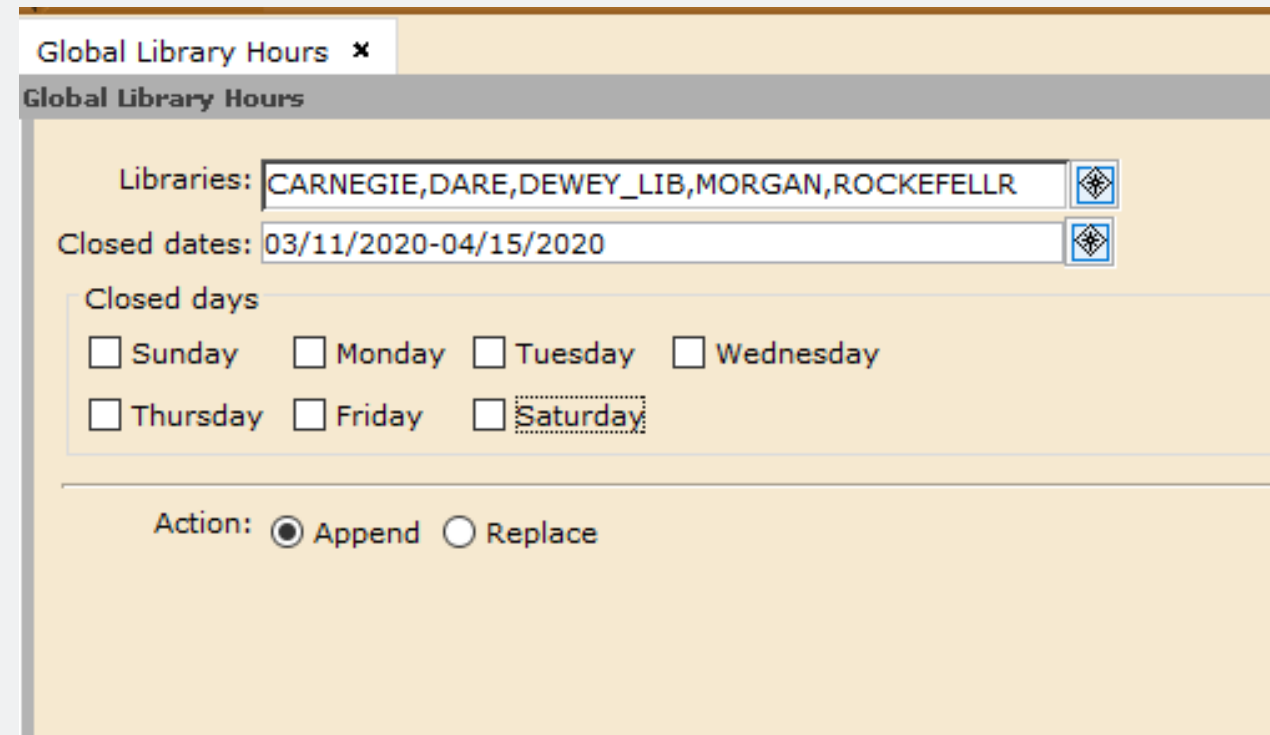
Closed from »	Until
03/11/2020	04/15/2020

< >

Add OK Update Remove Cancel

The screen may now look like this:

- So here we are going to set the selected libraries to be closed from 11 March 2020 to 15 April 2020. Note we are leaving the 7 days of the week alone. And also note we are using the APPEND (not REPLACE) option. If replace were to be used, all the existing closed days previously defined for these libraries would be removed. At this point click on the save button (will be at the bottom on the screen).



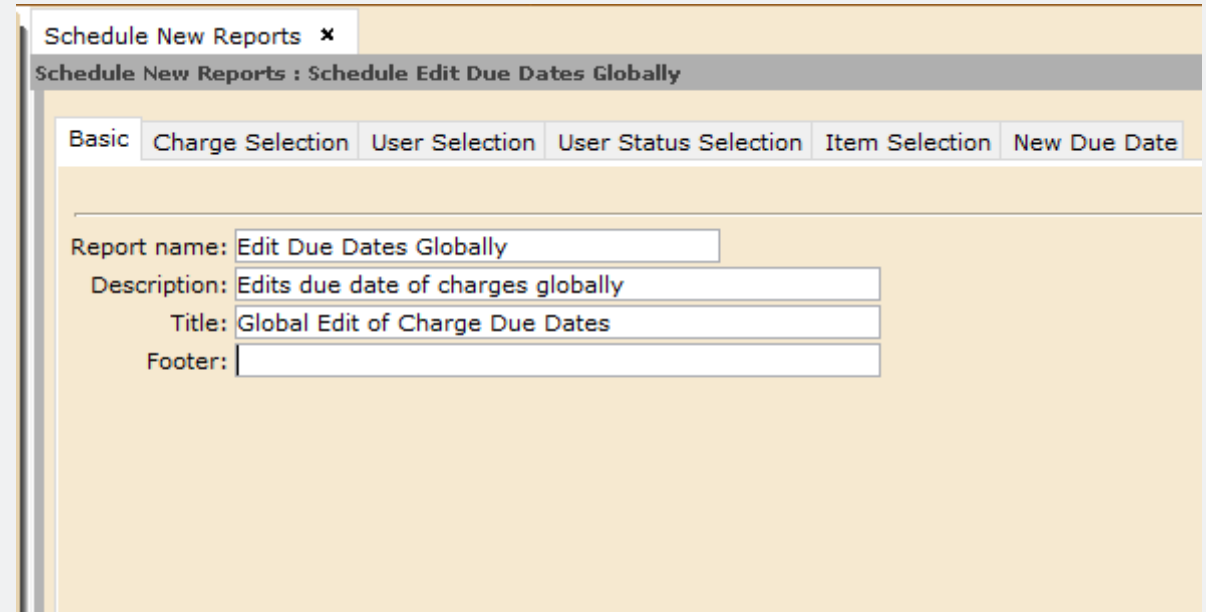
The screenshot shows a web interface titled "Global Library Hours" with a close button (x). The main heading is "Global Library Hours". Below this, there are two input fields: "Libraries:" containing the text "CARNEGIE,DARE,DEWEY_LIB,MORGAN,ROCKEFELLR" and "Closed dates:" containing the text "03/11/2020-04/15/2020". Both fields have a small icon to their right. Underneath these is a section titled "Closed days" containing seven checkboxes: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday. The "Saturday" checkbox is highlighted with a dashed border. At the bottom, there is an "Action:" label followed by two radio buttons: "Append" (which is selected) and "Replace".

Editing the due dates of existing charges with the Edit Due Dates Globally report

- While items which are charged or renewed after you've updated your library closed days and an halt/run has taken place will now skip over these closed days when assigning a due date, the site could likely have existing charges falling due during this closure and you will want to adjust all of these due dates so they fall when the library is expected to re-open.
- There is a report that can (carefully) be used to perform this task.

The first screen of the report will look like this:

- In the reports module, open the schedule new reports wizard, select the circulation report group, and choose the Edit Due Dates Globally report, and click on the Setup and Schedule Button. (You will likely be asked for a report password as it the case with many of the more powerful reports. Please call support if you need assistance finding this password.)



The screenshot shows a web-based wizard titled "Schedule New Reports" with a close button (X). Below the title bar, the current step is "Schedule New Reports : Schedule Edit Due Dates Globally". The wizard has six tabs: "Basic", "Charge Selection", "User Selection", "User Status Selection", "Item Selection", and "New Due Date". The "Basic" tab is active. It contains four text input fields: "Report name:" with the value "Edit Due Dates Globally", "Description:" with the value "Edits due date of charges globally", "Title:" with the value "Global Edit of Charge Due Dates", and "Footer:" which is empty.

It is suggested that you change the name of the report to something describing the situation

Schedule New Reports ✕

Schedule New Reports : Schedule Edit Due Dates Globally

Basic

Charge Selection

User Selection

User Status Selection

Item Selection

New Due Date

Report name:

Change due dates for Spring 2020 virus

Description:


Edits due date of charges globally


Title:


Global Edit of Charge Due Dates


Footer:

Then click on the charge selection tab so you can select what charges to change


Library: 


Current location: 


Date charged: 


Date due: 


Overdue: ☐ Yes ☐ No ☒ Both


Accrued fine: 


Date renewed: 


Number of renewals: 


Number of unseen renewals: 


Date claims returned: 

Date recalled: 

Date notice sent: 

Number of overdue notices: 

Number of recall notices: 

Circulation rule: 

Status: ☐ ACTIVE ☐ INACTIVE

Charge associated w/ user group: ☐ Yes ☐ No ☒ Both

If some but not all of the libraries will be involved, then you first need to set the library field to select the desired libraries. (If all libraries are closing, then the library field can be left alone).

Schedule New Reports x

Schedule New Reports : Schedule Edit Due Dates Globally

B: Gadget : Library

☒ Includes selected policies
☐ Excludes selected policies
☐ Contains invalid policy
☐ Contains no policy

List to choose from

CARNEGIE
DARE
DEWEY_LIB
MORGAN
ROCKEFELLR

List selected

CARNEGIE
DARE
DEWEY_LIB
MORGAN
ROCKEFELLR


OK Cancel

Next set the date due field to select charges where the due date currently falls in the desired range. (Can use the date gadgets to the right of the date field to select from a calendar)



Schedule New Reports x

Schedule New Reports : Schedule Edit Due Dates Globally

B: Gadget : Date Range



On	Before	After
Range	No date	Any

Use data for this period 03/11/2020  thru 04/15/2020 

OK Cancel



After making your selections, might look like this. (Unfortunately the report screens tend to truncate things a bit but here we've selected all the charges at these libraries due between 11 March 2020 and 15 April 2020.)

The screenshot shows a web application window titled "Schedule New Reports" with a sub-header "Schedule New Reports : Schedule Edit Due Dates Globally". The interface has several tabs: "Basic", "Charge Selection" (which is active), "User Selection", "User Status Selection", "Item Selection", and "New Due Date".

Under the "Charge Selection" tab, the following fields are visible:

- Library: with a dropdown icon.
- Current location: with a dropdown icon.
- Date charged: with a dropdown icon.
- Date due: with a dropdown icon.
- Overdue: ☐ Yes ☐ No ☒ Both
- Accrued fine: with a dropdown icon.
- Date renewed: with a dropdown icon.
- Number of renewals: with a dropdown icon.
- Number of unseen renewals: with a dropdown icon.
- Date claims returned: with a dropdown icon.
- Date recalled: with a dropdown icon.
- Date notice sent: with a dropdown icon.
- Number of overdue notices: with a dropdown icon.
- Number of recall notices: with a dropdown icon.
- Circulation rule: with a dropdown icon.
- Status: ☐ ACTIVE ☐ INACTIVE
- Charge associated w/ user group: ☐ Yes ☐ No ☒ Both

Now click on the new due date tab which is where we select the NEW due date to be assigned to our selected charges. Click on the gadget to the right side of the new date field to choose the new due date/time.

Schedule New Reports ✕

Schedule New Reports : Schedule Edit Due Dates Globally

Basic

Charge Selection

User Selection


User Status Selection

Item Selection

New Due Date

☐ Update database

New due date



This is what the gadget looks like.
Note that it shows today's date and
current time (2:54 PM). afaafs

Schedule New Reports x

Schedule New Reports : Schedule Edit Due Dates Globally

B: Gadget : Day and Time

Status Selection Item Selection New Due Date

Date

March 2020

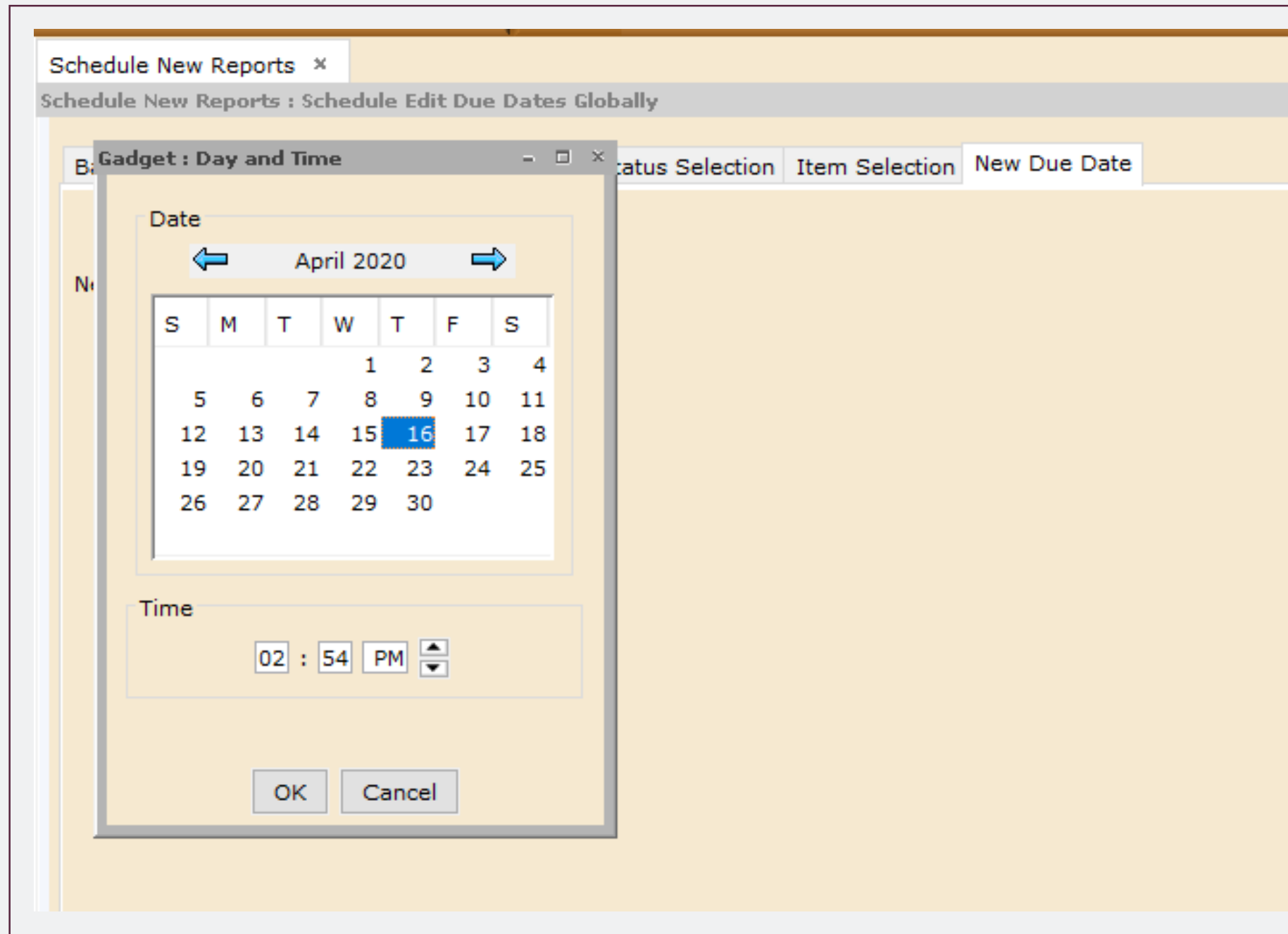
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Time

02 : 54 PM

OK Cancel

Likely would want to change the date to the day you be open (here is it April 16)



Schedule New Reports *
Schedule New Reports : Schedule Edit Due Dates Globally

B. Gadget : Day and Time

Date

← April 2020 →

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

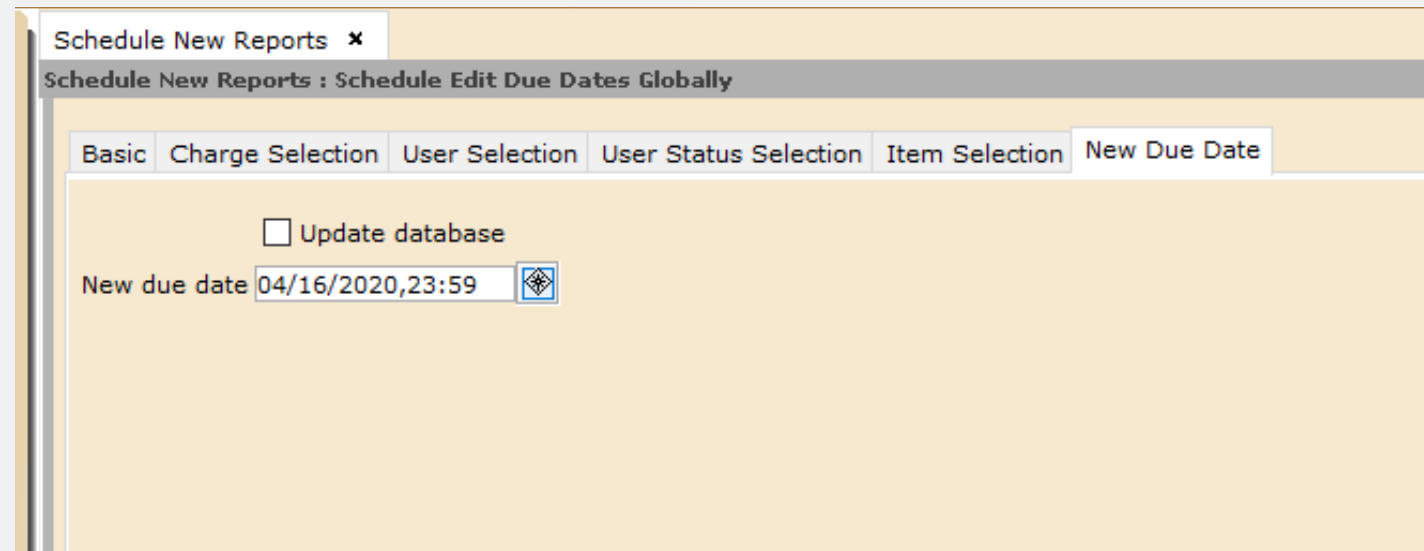
Time

11 : 59 PM

OK Cancel

- But if you don't change the time, then patrons who return their material on April 16 after 2:54PM could incur a fine, so be sure to change the time to 11:59 PM so patrons can return their items any time of the day on April 16.

Now the screen should look like this. Note we've left the update database checkbox off for the time being. I suggest now saving the report as a template.



The screenshot shows a web application window titled "Schedule New Reports" with a close button (x). Below the title bar is a grey header area with the text "Schedule New Reports : Schedule Edit Due Dates Globally". The main content area has a light orange background and contains a series of tabs: "Basic", "Charge Selection", "User Selection", "User Status Selection", "Item Selection", and "New Due Date". The "New Due Date" tab is currently selected. Inside this tab, there is a checkbox labeled "Update database" which is unchecked. Below this, the text "New due date" is followed by a text input field containing "04/16/2020,23:59" and a small blue icon with a white crosshair.

- Now go into the templates, select this report and click on setup and schedule, make sure the update database box is still unchecked and run the report.

Schedule New Reports x

Schedule New Reports : Schedule Change due dates for Spring 2020 virus

Basic Charge Selection User Selection User Status Selection Item Selection New Due Date

☐ Update database

New due date 4/16/2020,23:59

*Open the
finished report.
Should see
something like
this:*

What you're looking for here is where you selecting the right charges (with the desired due dates (and libraries perhaps) and do the results LOOK reasonable.

```
Charges will be selected if the  
date due is later than 3/10/2020  
and earlier  
than 4/16/2020.
```

```
Charges will be selected if  
library is CARNEGIE, DARE,  
DEWEY_LIB, MORGAN, or  
ROCKEFELLR.
```

```
Charges will be selected if  
status is ACTIVE.
```

```
456 charge record(s) considered.  
251 charge record(s) selected.
```

If the results seem unexpected

- If the results seem unexpected, then please call your friendly Sirsidynix support team. We are more than willing to assist and advise sites before they inadvertently set the wrong items to the wrong due dates. If the results are sound, then run the same exact report with the update database flag turned on.
- Also, if you haven't yet performed the halt run, then item charges or renewed later today could still fall in the closed period, so after the next halt run you should run the same template again to catch any charges that have fallen into the closed period.

What about assumed lost items?

That is a tricky question as sites all have different routines they use for deciding when to set overdue items to lost and/or set them to long overdue. This may be something you want to ask our friendly and understanding support staff about.

A typical library may set items to lost 60 days after the due date. If the library suddenly closed for a period lasting a week or more, a user may not be able to return their items and have then discharged before the 60 days is past. Or a site that process really old charges after a year with the process long overdue report could have users in similar situations. So sites may want to suspend reports such as assumed lost and process long overdue items while they are closed for a long time. Really up to the site, but again call support if you'd like some of our thoughts.

Holds waiting for pickup



This can be a bit tricky since again libraries have such a wide range of procedures. Many libraries have their library policy set with days for avail holds to expire set to (for example) seven days, and most of those run the expire available holds report to set holds to expire after the pickup date is in the past. Other library have the days for avail holds to expire set to NONE (or empty) and their trapped holds have no pickup date and some of these run an expire available holds report which selects holds a week or so after they are made available or perhaps a number of days after the hold was notified. Other libraries don't run the expire available holds report at all and staff just remove holds that haven't been picked up in a timely manner.

One thing to note is that for sites that have a number in the days for avail holds to expire in the library policy, as is the case with due dates, when a hold is trapped, it will be assigned a pickup date that is on a day the library will be open. So after putting in new closed dates and performing a halt/run, holds that are later trapped will avoid the closed days. But existing holds would retain their pickup dates assigned before those closed days were created.

One thing to emphasize is if a hold that hasn't been picked up has a pickup date that is in the past, it

will remain active until is processed by the expire available holds report. So what you can do is simply not run the expire available holds report for the libraries which are closed.

If all of your libraries are closed, then just suspend the expire available holds report and then after you've been open again (perhaps give a few more days) then you can start to run that report again to catch up. If some libraries will remain open, you may want to adjust the report to select only holds where the pickup library field includes the libraries that remain open.

There is a trick that patrons may see their hold has a pickup date in the closed period and fear their hold will be removed because they can't pick it up. A few possibilities here. We can run api to change the pickup date on these holds to be after you open (so patrons seeing their holds online would be re-assured they can pickup their holds later when the library re-opens).

One possibility to is have support help run a modified report that sends a notice to every user with active available holds where the message informs them their holds will be kept for pickup. Again call support to help with this please.

Holds being placed and trapped

It might be that a site just prefers to stop hold activity for the closure then start holds back up again. If you just want to stop any holds activity (not allow any new holds to be placed, and not trap any existing holds) one simple way to do so is in the hold map, create a policy that has library of All, item type All, user profile All, and permission of none as follows.

Open the hold map wizard and click on the create button

Hold Map x

Hold Map : List Policies

Library: All

Item type: All

User profile: All

OPAC Hold Range:

Search

Exact Search

Find Next

Clear




Hold Map

Name	Description	Library	Item Type	User Profile	OPAC Hold Range	Allow multiple titl...
BOOKGOOD	Book Good	ALL	BOOKGOOD	ALL	LIBRARY	N
REF	No holds on reference	ALL	REFERENCE	ALL	SYSTEM	N
BLURAY	Local holds only on BLURAY	ALL	BLURAY	ALL	SYSTEM	N
CHIDBLU	No Blurays for Children	ALL	BLURAY	CHILD	SYSTEM	N
BEST	Best Sellers fill local lib/group first	ALL	BESTSELLER	ALL	SYSTEM	N
VIDEO	Local holds first on Video	ALL	VIDEO	ALL	SYSTEM	N
CD-DVD	CD-DVDs fill local holds only	ALL	CD-DVD	ALL	SYSTEM	N
BKCD	No holds on BKCD material	ALL	BKCD	ALL	SYSTEM	N
ALIEN	Space aliens may not place holds	ALL	ALL	ALIEN	SYSTEM	N
CARNMAG	Carnegie Magazine	CARNEGIE	MAGAZINE	ALL	SYSTEM	N
ROCKMAG	Rocky Magazine all allowed	ROCKEFELLR	MAGAZINE	ALL	SYSTEM	N
DEWEYMAG	Dewey Magazine	DEWEY_LIB	MAGAZINE	ALL	SYSTEM	N
MORGMAG	Morgan Mag	MORGAN	MAGAZINE	ALL	SYSTEM	N
JOURNAL	Journals no holds	ALL	JOURNAL	ALL	SYSTEM	N
ART	art	ALL	ARTWORK	ALL	SYSTEM	N
BOOK	Books fill local holds first	ALL	BOOK	ALL	SYSTEM	N

Create (b) Display Modify Copy Remove Close (d)

Hold Map x

Hold Map



Name:

SPRING20

Description:

No holds for Spring 2020 Closure

Item library:

All

⌵

Item type:

All

⌵

User profile:

All

⌵

Permission:

NO_HOLDS

⌵

Priority:

NONE

⌵

OPAC Hold Range:

SYSTEM

⌵

☐ Allow multiple title-level holds

The new rule

The new rule should be at the bottom. Don't worry about any other lines above this new line as since the map is read from top to bottom any attempt to place/fill a hold will match this bottom line rendering all of the other lines meaningless.

Hold Map

Hold Map : List Policies

Library: All

Item type: All

User profile: All

OPAC Hold Range:

Search

Exact Search

Find Next

Clear

Hold Map

Name »	Description	Library	Item Type	User Profile	OPAC Hold Range	Allow multiple titl...
BOOKGOOD	Book Good	ALL	BOOKGOOD	ALL	LIBRARY	N
REF	No holds on reference	ALL	REFERENCE	ALL	SYSTEM	N
BLURAY	Local holds only on BLURAY	ALL	BLURAY	ALL	SYSTEM	N
CHIDBLU	No Blurays for Children	ALL	BLURAY	CHILD	SYSTEM	N
BEST	Best Sellers fill local lib/group first	ALL	BESTSELLER	ALL	SYSTEM	N
VIDEO	Local holds first on Video	ALL	VIDEO	ALL	SYSTEM	N
CD-DVD	CD-DVDs fill local holds only	ALL	CD-DVD	ALL	SYSTEM	N
BKCD	No holds on BKCD material	ALL	BKCD	ALL	SYSTEM	N
ALIEN	Space aliens may not place holds	ALL	ALL	ALIEN	SYSTEM	N
CARNMAG	Carnegie Magazine	CARNEGIE	MAGAZINE	ALL	SYSTEM	N
ROCKMAG	Rocky Magazine all allowed	ROCKEFELLR	MAGAZINE	ALL	SYSTEM	N
DEWEYMAG	Dewey Magazine	DEWEY_LIB	MAGAZINE	ALL	SYSTEM	N
MORMAG	Morgan Mag	MORGAN	MAGAZINE	ALL	SYSTEM	N
JOURNAL	Journals no holds	ALL	JOURNAL	ALL	SYSTEM	N
ART	art	ALL	ARTWORK	ALL	SYSTEM	N
BOOK	Books fill local holds first	ALL	BOOK	ALL	SYSTEM	N
SPRING20	No holds for Spring 2020 Closure	ALL	ALL	ALL	SYSTEM	N

Create (b)

Display

Modify

Copy

Remove

Close (d)

Extending user expiration dates

- Some sites have been indicating that they have users who may have expired recently or who will soon expire and they want to extend their expiration dates so that these users are able to use on line resources.
- This is done with the Set User Expiration Date report in the user report group.

In this report

In this report on the user selection tab, would likely want to select users based on the privilege expiration date field

Schedule New Reports x

Schedule New Reports : Schedule Set User Expiration Date

Basic Style Sheet **User Selection** User Status Selection Expiration Date Print User

Library:

User profile:

User category 1:

User category 2:

User category 3:

User category 4:

User category 5:

User category 6:

User category 7:

User category 8:

User category 9:

User category 10:

User category 11:

User category 12:

Department:

Birth date:

Outreach user: ☐ Yes ☐ No ☒ Both

Address1 entry:

Address2 entry:

Address3 entry:

Date created:

Privilege granted date:

Privilege exp. date:

Last activity date:

Title:

Extended info:

☒ blank field matches with Not Equal qualifier

Number of charges:

Number of reserve charges:

Number of total charges:

Select the range

Select the range of dates. Here we are selecting users who expiration date is between March 15 and June 1 2020

dget : Date Range

On Before After

Range No date Any

Use data for this period 3/15/2020 thru 6/1/2020

OK Cancel

Should look like this

Schedule New Reports x

Schedule New Reports : Schedule Set User Expiration Date

Basic Style Sheet User Selection User Status Selection Expiration Date Print User

Library:

User profile:

User category 1:

User category 2:

User category 3:

User category 4:

User category 5:

User category 6:

User category 7:

User category 8:

User category 9:

User category 10:

User category 11:

User category 12:

Department:

Birth date:

Outreach user: ☐ Yes ☐ No ☒ Both

Address1 entry:

Address2 entry:

Address3 entry:

Date created:

Privilege granted date:

Privilege exp. date:

Last activity date:

Title:

Extended info:

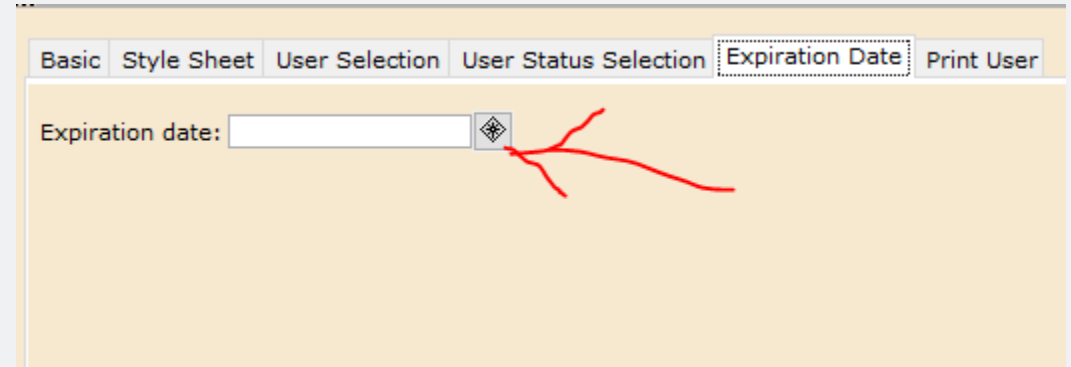
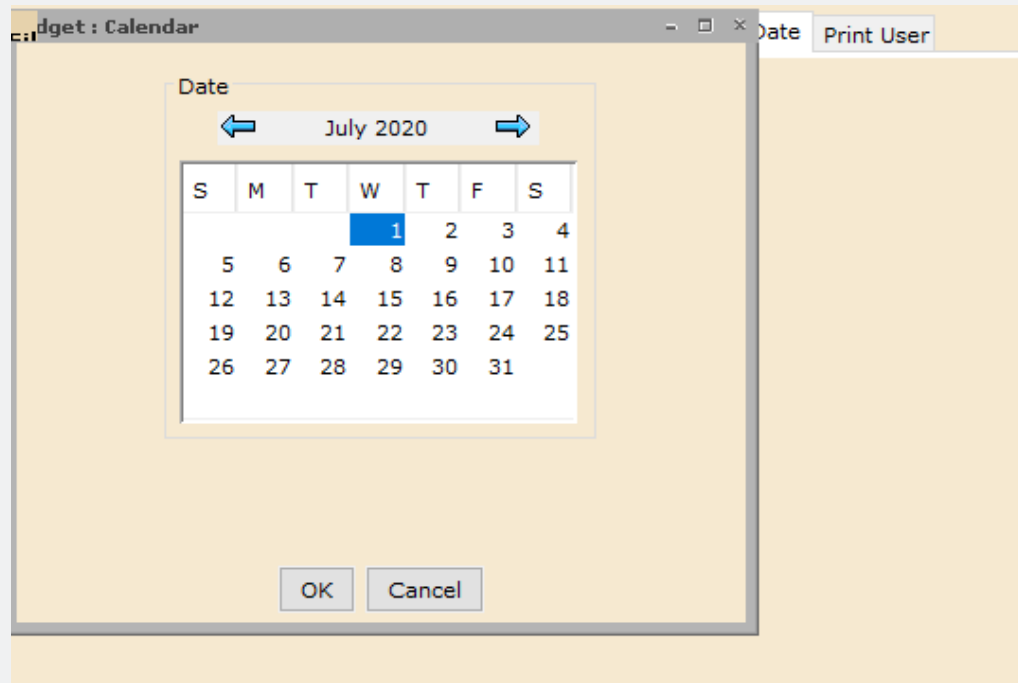
☒ blank field matches with Not Equal qualifier

Number of charges:

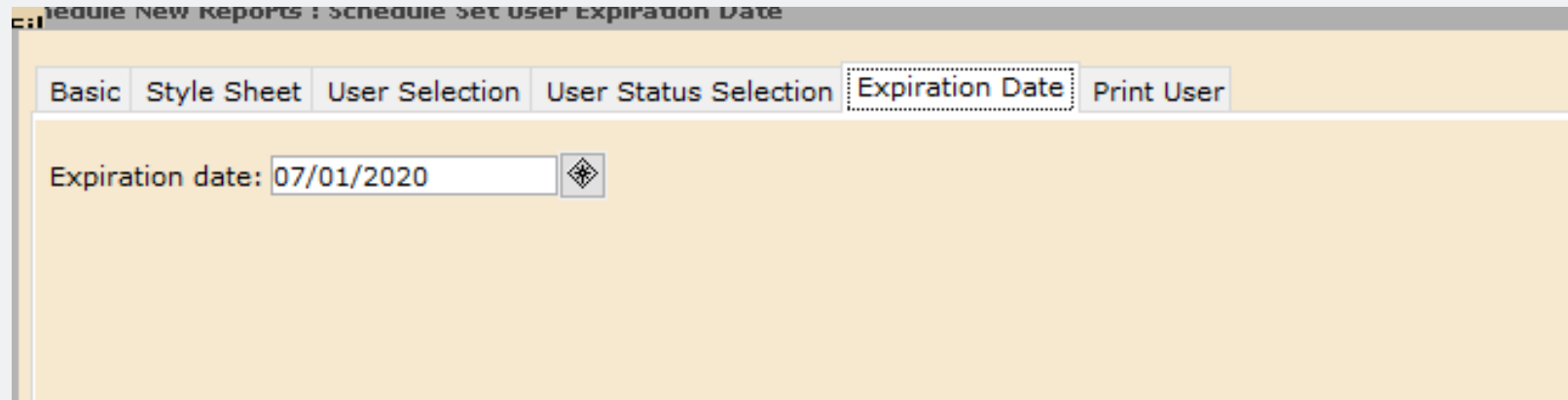
Number of reserve charges:

Number of total charges:

On the expiration date tab, choose the new expiration date



Should look like this (changing all selected users to July 1 2020)



The screenshot shows a web application window titled "Schedule New Reports : Schedule Set User Expiration Date". It features a horizontal tab bar with six tabs: "Basic", "Style Sheet", "User Selection", "User Status Selection", "Expiration Date", and "Print User". The "Expiration Date" tab is currently selected and highlighted with a dotted border. Below the tabs, the "Expiration date:" label is followed by a text input field containing the date "07/01/2020". To the right of the input field is a small square button with a calendar icon.

- There is no option on this report for test mode so please call your friendly support staff if you would like guidance through this report.