

Circulation Skills Checklist

Minimum Requirements

Know the **General**

Skills (<https://wyldlibraries.freshdesk.com/support/solutions/articles/61000288838-general-skills-checklist>) and be signed up for the appropriate **distribution list** (<https://wyldlibraries.freshdesk.com/support/solutions/articles/61000284898-wyld-email-lists>).

1. Be familiar with **Workflows Searching Tips technote** (<https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285354-workflows-searching-tips>).
2. Check out, check in, and renew materials, including Special Due Date and Modify Due Date helpers, and Bookdrop and Ephemeral wizards.
3. Recognize items that need special attention and forward materials accordingly (damaged, missing parts, routing in-transit items, holds, temporary titles, interlibrary loans, special collections).
4. Be familiar with the **WYLD Card Policy** (<http://library.wyo.gov/downloads/WYLD/WYLDcardpolicy.pdf>).
5. Enter basic patron registration (understanding your library user types), issue new and replacement cards (User Lost Card wizard).
6. Recognize and respond to alerts, notes, and message windows during circulation transactions (Renew Privilege and Add Temporary Title helpers).
7. Override transactions.
8. Handle basic fine and bill paying procedures (Paying Bill and Bill a User wizards and the Pay Bill Now option).
9. Know how to access context sensitive online help in Symphony Workflows for instructions.
10. Know when to contact the WYLD Office.
11. Add brief title (be familiar with follow-up procedures for your library).
12. Know about right clicking on line items in wizard displays to get a list of actions that may be taken on elements in that line.

Intermediate Requirements

1. Maintain patron records in depth (all fields, appropriate use of note and comment fields, overlaying another library's patron record, directing overdue notices to alternate addresses, handling blocked records). The recommended procedure for overlaying a patron record can be found in **Overlaying Patron Records Technote** (<https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285283-updating-library-ownership-overlaying-of-patron-records>).
2. Handle advanced fine and bill paying procedures (bill for lost item using the Mark Item Lost Wizard, removing fines from items to be discarded and Creating Account Credits).
3. Maintain holds (using comment field, removing, modifying, trapping on-shelf item holds, recalls, copy-specific, priority, and the On-shelf Items wizard).

4. Maintain item information (mark claims returned, missing or lost, item used; change item barcode; check item status).
5. Print on-demand from Workflows.
6. Use the backup circulation system (Workflows Standalone). **Instructions are found here** (<https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285351-standalone-offline-circulation>).
7. Retrieve and print daily circ reports.
8. Know how to configure wizard properties to print and email receipts.

Expert Requirements

1. Delete patron records.
2. Track and clear fines to enable withdrawal of problem items.
3. Use reports to track and resolve long overdue, claims returned, lost, missing items, and temporary titles.
4. Inventory items, if applicable.
5. Configure wizards as needed; know how to copy wizard settings from one computer to another.
6. Understand and manage reports using **Reports Skills Checklist** (<https://wyldlibraries.freshdesk.com/support/solutions/articles/61000288837-reports-skills-checklist>).
7. Understand and manage reports using **Analytics Skills Checklist** (<https://wyldlibraries.freshdesk.com/support/solutions/articles/61000280837-analytics-skills-checklist>).
8. Understand your library/library system **Circ Map (WYLD Technote)** (<https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285182-circulation-map>).
9. Know where to find more information about library policies? **Online WYLD Library Policies lookup** (<http://wyld.sirsi.net/map/>).

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