

## FAQs: Circulating Items in Groups

The Circulation Sets feature allows users to group individual items together to circulate as one set of items.

### Circulation Set Wizards

The Circulation Sets feature includes the following wizards. These wizards are found in the Maintain Sets group on the Circulation toolbar.

- **Add Circulation Sets** — Use this wizard to create a circulation set.
- **Display Circulation Sets** — Use this wizard to display a list of all items contained in a circulation set. If you type a set ID, all the items belonging to the set display.
- **Modify Circulation Sets** — Use this wizard to change the makeup of a circulation set. You can add or remove items from the set using this wizard.
- **Remove Circulation Sets** — Use this wizard to remove a circulation set.

### Circulation Set Designations

You can identify the circulation sets as parental

- **Parental** — A parental circulation set has a separate bibliographic and item record designated as the parent item. When items circulate as part of a parent circulation set, the items are circulated using the same loan period and circulation rule as the parent item.

An example of a parent circulation set could be a space exploration project resource box consisting of several videos, books, star atlas, and a model. As well as each of the items having their own bibliographic record and item record, a bibliographic and item record would be created for the resource kit. When borrowed individually, the loan period would be determined from the circulation map of the item's individual item type; however, if the project resource box is charged through the set, then the loan period for all of the items will be determined from the circulation map using the parent record's item type.

### Creating and Maintaining Circulation Sets

When creating and maintaining circulation sets, keep in mind the following.

- You must group together at least two Item IDs to make a set. As you add items to the set, the Total Parts in Set counter updates with the number of items in the set.
- For each type of circulation set there is a set ID. For parent-type circulation sets, the ID of the parent item is the set ID
- When creating circulation sets, if you select the Circulate as Set option, items within the set cannot circulate individually; they can only circulate as part of the set. If the Circulate as Set option is not selected, then items within the set can individually circulate.
- An item cannot belong to more than one circulation set. When a set is created or an item is added to a set, the system will check to see if the item already belongs to a set, and if so, prevent the item from being added to the new set.

### Checking Out Circulation Sets

The Checkout wizard contains a behavior property, Checkout All Items Associated with a Set, which allows you to check out all items at once, or prompts you to select items for check out. If you click the Yes option, when a set ID or parent ID is scanned, then all items associated with the circulation set will be checked out. You will not be required to type or scan all item IDs for items within the set. If you click the Prompt option, the wizard will display a list of items associated with the set at check out. The list includes check boxes for you to select which set items to include in the check out.

The following are some circulation set check out scenarios.

#### Checking out a parent type circulation set:

When you scan a set ID for a parent type circulation set, the wizard will display a list of the items that belong in the set. The system checks out the parent item and each of the child items using the circulation map for the

parent item (the parent item does not circulate on its own).

For example, a resource box has been created for a science project. A circulation set record and set ID were created for the box with a type of Parent. The box consists of several books, videos, and a model. Each item within the box has its own bibliographic record and item characteristics. The resource box as a whole also has its own bibliographic and item record. The circulation map for the resource box indicates the 14DAY circulation rule. When the set ID (parent ID) is scanned in the Checkout wizard, the following occurs:

- The wizard verifies that the patron has privileges to borrow the parent item, based on the circulation map.
- The wizard verifies that the set is available to be checked out.
- The library staff member may see a prompt to display items in the set and, if Yes is selected, a list of items in the set is displayed with options to select which items are checked out.
- Selected items (or all items) associated with the set will be checked out using the circulation map for the parent item (resource box item record) and be due on the same day (all charges will have the 14DAY circulation rule).
- Overrides/exceptions will display for respective item(s) within the set during the set check out.
- A check out transaction is written to the log file for each item checked out in the set, and the transaction is identified as a circulation set check out.
- The item counters for each item checked out within the set are updated.

**Checking out a circulation set item that cannot circulate individually:**

The control record indicates whether or not items within a set can be checked out individually. If items cannot circulate individually, the wizard displays a message indicating that the item can only circulate as part of a circulation set and includes the set ID in the message.

For example, a patron wants to check out an item individually that also circulates as part of a circulation set. The library staff member scans the ID for the item. SirsiDynix Symphony checks the group database and determines that the item is part of a circulation set. The system then checks the circulation set control record to determine if items within the set are allowed to circulate individually. The control record is set to not allow circulation of individual set items, and so the check out is denied. The wizard displays a message indicating that the item can only circulate as part of a circulation set and includes the set ID in the message.

**Checking In Circulation Sets**

You can check in circulation sets using the Check In/Discharge, Checkin Bookdrop Items, and Fine Free Checkin wizards. These wizards contain a new Behavior property, Discharge All Items Associated With Set, which allows you to discharge the circulation set by scanning the set ID. You can select one of the following settings depending on whether or not you want to discharge all items in a circulation set with one discharge action or discharge each item separately. Items checked in as a set or part of a set will transit to the circulation set's owning library defined in the circulation set control record, and each item associated with the circulation set and checked in will display in the checkin list.

- Yes — The wizard will discharge all items in the circulation set with one discharge action.
- No — The wizard will individually discharge each item.
- Prompt — The wizard will display the list of items checked out as part of the set, and you can select which items should be checked in.

## Renewing Circulation Sets

You can renew circulation sets using the Renew Item wizard and the renew item function of the Checkout wizard. If you scan a set ID, the wizard displays the list of items in the set. You can renew all items or selected items from the list. If a parental type circulation set is renewed, then all items in the set are renewed using the circulation rule of the parent item. If a non-parental circulation set is renewed then all items in the set are renewed using the items' individual circulation rules.

Circulation sets can also be renewed using the Renew User wizard. Select the items in set from the list of checkouts that displays in Renew User wizard.

## Receiving Circulation Sets In Transit

You can receive circulation sets in transit using the Receive In Transit Items wizard by typing or scanning the set ID on the Receive Set tab. This tab will display all received circulation set items.

## Marking Circulation Sets as MISSING or LOST

You can mark circulation sets missing or lost using the Mark Item Missing and Mark Item Lost wizards.

- Mark Item Missing — When a set ID is scanned in the wizard, the wizard displays the list of items in set. In this list, you can select which items in the set are missing. The wizard will update each selected item's current location to MISSING.
- Mark Item Lost — When a set ID is scanned in the wizard, the wizard displays the list of items in set. In this list, you can select which items in the set are lost. The wizard will prompt to create a lost bill for each item and update each selected item's current location to LOST\_CLAIM.

## Marking Circulation Sets as Used

You can mark circulation sets as used using the Mark Item Used wizard. When you scan or type a set ID in the Mark Item Used wizard, the wizard displays the list of items in the set along with item status information. In this list, you can select which items in the set are to be marked for inhouse use. The in use counter and the last activity date for these items are updated.

## Inventorying Circulation Set Items

You can inventory circulation sets using the Inventory Item wizard. When you scan or type a set ID in the Inventory Item wizard, the wizard displays the list of items in the set with item status information. You can select which items in the set are to be inventoried. The inventory counter and the last activity date for these items are updated.

## Checking the Circulation Status of a Circulation Set

You can check the status of a circulation set using the Check Item Status wizard. When the set ID is scanned, the wizard displays the circulation set status and a list of items that belong to the set with the items' individual status information.

## Circulation Sets and Reserves

The Circulation Sets feature has not been fully implemented with Reserves. If you want to reserve a set, you will need to place each item in the set individually on reserve.

Currently, when the parent of a set is on reserve with a 2-hour circulation rule in the reserve record, then all items in the set are checked out for 2 hours, even set members that are not on reserve.

Also, when the parent of a set is not on reserve, but a member of the set is on reserve, when you check out the parent, the reserve circulation rule is ignored for the reserve item in the set. It strictly uses the parent item's circulation rule.