PHD Dolphin+ Quick Reference User’s Guide

IMPORTANT KEYS

ON SCAN
This key serves three purposes:

1. Turns the PHD Dolphin+ on.
2. Acts as the trigger for the laser.
3. Returns the user to the Main Menu when not in a scanning mode.

BKSP
This key serves two purposes:

1. Acts as the “NO” key.
2. Acts as an “Esc” key. Hitting this key will return you to the previous menu.

ENTER
This key acts as the “YES” key.

F1, F2, F3 and F4
These function keys are used to select the various menu options presented on the PHD+ Dolphin display.

SHIFT
This key controls which characters are entered when using the numbered, yellow keys on the keypad.

If the keys are in numeric mode (numbers will be entered when keys are used), the following symbol will be displayed in the lower left area of the PHD Dolphin+ display:

If the keys are in alpha mode (letters will be entered when keys are used), the following symbol will be displayed in the lower left area of the PHD Dolphin+ display:

Note: There is no “OFF” button. The PHD Dolphin+ will automatically turn itself off after about one minute when not in use.
PHD DOLPHIN+ MAIN MENU

It is important to be able to recognize and navigate to the PHD Dolphin+ Main Menu because most of the instructions use this screen as a reference point.

![Figure 1: PHD Dolphin+ Main Menu](image)

Getting to the Main Menu...

There are two ways to return to the PHD Dolphin+ Main Menu:

1. Hit the **ON SCAN** key when not in scanning mode.

2. Hit the **BKSP** key repeatedly until the Main Menu is displayed.
A. Uploading the PHD Dolphin+ application
B. Downloading scans into Inventory
C. Creating reports using patron or copy barcodes
D. Updating or deleting patron records via the PHD Dolphin+
E. Updating copy records via the PHD Dolphin+
F. Exporting title and copy records via the PHD Dolphin+
G. Removing categories from copy records via the PHD Dolphin+
H. Deleting copy records via the PHD Dolphin+
I. Circulating with the PHD Dolphin+ (Remote Circulation)
J. Erasing scans from the PHD Dolphin+
K. Determining the number of scans stored in the PHD Dolphin+
L. Rebooting the PHD Dolphin+
M. Aborting a failed communication attempt
A. Uploading the PHD Dolphin+ Application

On the computer:

1. Open the System Setup module.
2. Go to the Setup drop-down menu and select Site.
3. Click on the PHD tab.
4. Click on the PHD Dolphin+ radio button.
5. Make sure the correct port is selected.

On the PHD Dolphin+:

1. Insert the PHD Dolphin+ into the HomeBase.
2. From the Main Menu, hit F4-Setup.
3. Hit F3-Update Software.

On the computer:

1. Hit the Load button.

The application will take 4-5 minutes to fully load.

If the PHD Dolphin+ application has never been loaded before, the following prompt will be displayed when the Dolphin is initially turned on:

Go to System Setup to load application
Press ENTER to begin loading

In this case, simply click Load on the computer and Enter on the Dolphin. Once the Dolphin application has loaded, this prompt will not be displayed again.
B. Downloading scans into inventory

On the computer:

1. Open the Inventory module.
2. Click on the Remote button.
3. Select the PHD Dolphin+ radio button.
4. Make any other desired on-screen selections.

On the PHD+ Dolphin:

1. From the Main Menu, hit F1-Circulation Plus.
2. Hit F2-Inventory.
3. Hit F1-Scan Items.
4. Hit the ON:SCAN to trigger the laser.
5. Scan the copy barcodes.
6. Hit BKSP to exit out of the scanning mode.
7. Hit the ON:SCAN button to quickly return to the Main Menu.
8. Insert the PHD Dolphin+ into the HomeBase.
9. Hit F3-Send.

On the computer:

1. Hit the Proceed button.

C. Creating reports using patron or copy barcodes

In WCC/MCC, the following reports can be generated using the PHD Dolphin+:

- Bibliography Report
- Title List
- Patron Name List
- Patron Cards

On the computer:

1. Open the Reports module.
2. Select the report you wish to generate.
3. Select either “Titles via PHD” or “Patrons via PHD” in the “Select By:” field.
4. Click on Print Preview, Print to File, or Print.
5. Click on the PHD Dolphin+ radio button.
On the PHD Dolphin+:

1. From the Main Menu, hit **F1-Circulation Plus**.
2. Select **F3-Patrons** or **F4-Copies**, depending on which report you are generating.
3. Hit **F1-Scan Copies** or **F1-Scan Patrons**.
4. Using the **ON:SCAN** button, scan the copy or patron barcodes that will be included on the report.
5. Hit **BKSP** to exit the scanning mode.
6. Hit **ON:SCAN** to return to the Main Menu.
7. Insert the PHD Dolphin+ into the HomeBase.
8. Hit **F3-Send**.

On the computer:

1. Hit the **Download** button.

**D. Updating or deleting patron records via the PHD Dolphin+**

In WCC/MCC, the following patron record fields may be edited via the PHD:

- Patron status
- Patron type
- Location 1 and 2
- User Field 1 and 2

Patron records may also be deleted via PHD.

On the computer:

1. Open the Patron Maintenance module.
2. From the **Edit** drop-down menu, select one of the following:
   - **Update via PHD**.
   - **Delete Patrons via PHD**.
3. Click on the **PHD Dolphin+** radio button.
4. Make all other on-screen selections based on the type of changes you wish to make.
5. Hit the **Update** button if you are editing the patron records, or hit the **Delete** button if you are deleting patron records.

On the PHD Dolphin+:

1. From the Main Menu, hit **F1-Circulation Plus**.
2. Hit **F3-Patrons**.
3. Hit **F1-Scan Patron.**
4. Using the **ON:SCAN** button, scan the patron barcodes that will be edited or deleted.
5. Hit **BKSP** to exit the scanning mode.
6. Hit **ON:SCAN** to return to the Main Menu.
7. Insert the PHD Dolphin+ into the HomeBase.
8. Hit **F3-Send.**

On the computer:

1. Click on “Yes” when asked if you are sure that you want to delete or update the records.

**E. Updating copy records via the PHD Dolphin+**

The following copy record fields may be edited via the PHD in WCC/MCC:

- Circulation Type
- Category
- Copy Status

On the computer:

1. Open the Cataloging module.
2. From the **Edit** drop-down menu, select **Update Copies via PHD**.
3. Click on the **PHD Dolphin+** radio button.
4. Make all other on-screen selections depending on the intended type of update.
5. Click the **Update** button.

On the PHD Dolphin+:

1. From the Main Menu, select **F1-Circulation Plus**.
2. Select **F4-Copies**.
3. Select **F1-Scan Copies**
4. Using the **ON:SCAN** button, scan the copy barcodes that will be edited.
5. Hit **BKSP** to exit the scanning mode.
6. Hit **ON:SCAN** to return to the Main Menu.
7. Insert the PHD Dolphin+ into the HomeBase.
8. Hit **F3-Send.**

On the computer:

1. Click on “Yes” when asked if you are sure that you want to update the records.
F. Exporting title and copy records via the PHD Dolphin+

On the computer:

1. Open the Cataloging module.
2. From the File drop-down menu, select Export MARC 21/852 Holdings Format | via PHD.
3. Click on the PHD Dolphin+ radio button.
4. Make all other on-screen export selections depending on what type of records will be exported and if the records are to be deleted following the export the intended type of update.

On the PHD Dolphin+:

1. From the Main Menu, select F1-Circulation Plus.
2. Select F4-Copies.
3. Select F1-Scan Copies.
4. Using the ON SCAN button, scan the copy barcodes that will have the category removed.
5. Hit BKSP to exit the scanning mode.
6. Hit ON SCAN to return to the Main Menu.
7. Insert the PHD Dolphin+ into the HomeBase.
8. Hit F3-Send.

On the computer:

1. Click the Export button.

G. Removing categories from copy records via the PHD Dolphin+

On the computer:

4. Open the Cataloging module.
5. From the Edit drop-down menu, select Remove Category via PHD.
6. Click on the PHD Dolphin+ radio button.
7. Select the category to be removed in the “Remove Category” field.
8. Click on the Remove button.

On the PHD Dolphin+:

9. From the Main Menu, select F1-Circulation Plus.
10. Select F4-Copies.
11. Select F1-Scan Copies.
12. Using the **ON**:SCAN button, scan the copy barcodes that will have the category removed.
13. Hit BKSP to exit the scanning mode.
14. Hit **ON**:SCAN to return to the Main Menu.
15. Insert the PHD Dolphin+ into the HomeBase.
16. Hit **F3**:Send.

On the computer:

2. Click on **"Yes"** to confirm that you want to remove the categories from the copy records.

H. Delete copy records via the PHD Dolphin+

On the computer:

1. Open the Cataloging module.
3. From the **Edit** drop-down menu, select **Delete Copies via PHD**.
4. Click on the **PHD Dolphin+** radio button.
5. Select all other desired on-screen options.
6. Click on the **Delete** button.

On the PHD Dolphin+:

1. From the Main Menu, select **F1**:Circulation Plus.
2. Select **F4**:Copies.
3. Select **F1**:Scan Copies.
4. Using the **ON**:SCAN button, scan the copy barcodes that will be deleted.
5. Hit BKSP to exit the scanning mode.
6. Hit **ON**:SCAN to return to the Main Menu.
7. Insert the PHD Dolphin+ into the HomeBase.
8. Hit **F3**:Send.

On the computer:

1. Click on **"Yes"** to confirm that the copies will be deleted.

I. Circulating with the PHD Dolphin+ (Remote Circulation):

On the computer:

1. Open the Circulation Desk module.
2. Click on the **Remote Circ** button or select Remote Circulation from the Circulation drop-down menu.
3. Click on the **PHD Dolphin+** radio button.
4. Make all other desired on-screen selections.

On the PHD Dolphin+:

1. From the Main Menu, select **F1-Circulation Plus**.
2. Hit **F1-Circulation**.
3. Select **F1-Check In** or **F2-Check Out**.
4. Hit the **ENTER** key if you need to change the date and time, **BKSP** if you do not.
5. Using the **ON SCAN** key, scan the patron or copy barcodes as prompted.
6. Hit **BKSP** to exit the scanning mode.
7. Hit **ON SCAN** to return to the Main Menu.
8. Insert the PHD Dolphin+ into the HomeBase.
9. Hit **F3-Send**.

On the computer:

1. Click the **Proceed** button.

### J. Erasing scans from the PHD Dolphin+

Scans may be erased from one area (Circulation, Inventory, Patron, or Copies) of the PHD Dolphin+ at a time, or, all scans can be erased at the same time.

**To erase scans from one area only:**

1. From the Main Menu, select **F1-Circulation Plus**.
2. Select the area that you wish to delete the scans (**F1, F2, F3, or F4**).
3. Select **F4-Erase (CIRC, INV, PAT, or COPY) Scans**.
4. Hit **ENTER** to confirm that you wish to delete the scans.

**To erase all scans in all four areas at the same time:**

1. From the Main Menu, select **F4-Setup**.
2. Hit **F4-Utilities**.
3. Hit **F4-Erase ALL scans**.
4. Hit the **ENTER** key to confirm that you wish to delete all the scans.

### K. Determining the number of scans stored in the PHD Dolphin+

To see how many scans are in each area of the PHD Dolphin+:
1. From the Main Menu, hit **F4-Setup**.
2. Hit **F1-About**.
3. Hit **F3-Scan Counts**.

L. **Rebooting the PHD Dolphin+**

To reboot the Dolphin, press the **ON:SCAN + SHIFT + BKSP** keys at the same time and release. The Dolphin unit needs to be ON, but it may be in or out of the HomeBase.

M. **Aborting a failed communication attempt**

On the computer:

Click on the **Exit** or **Cancel** button on the **Dolphin File Transfer** (Windows) or **Sending to Dolphin** screen.

On the Dolphin unit:

Reboot (ON SCAN + SHIFT + BKSP)