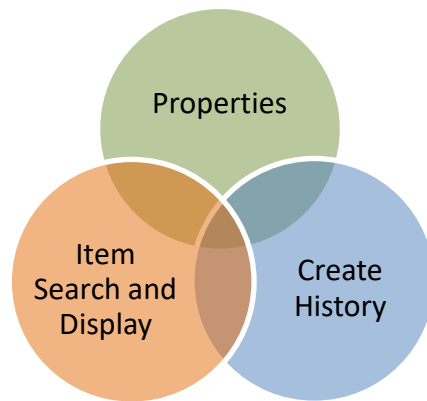


# Manually Adding Histories

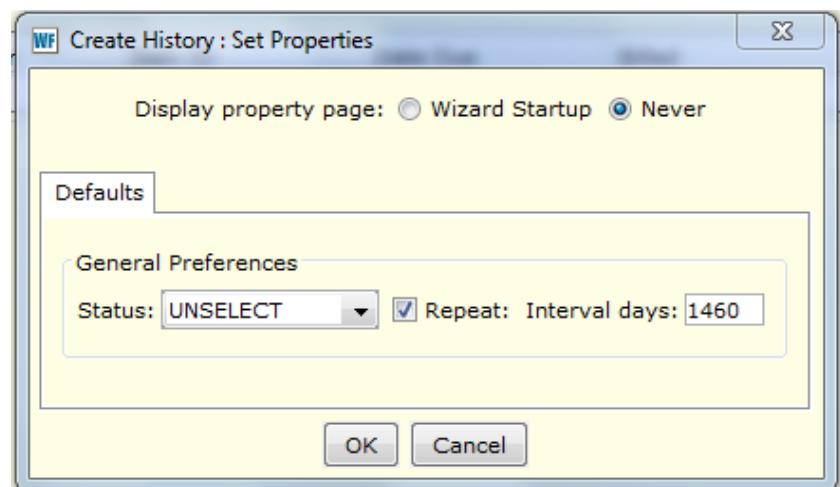
## Create History Wizard

To create a history record for an outreach user you will use the following features:



## Properties

Work with your System Administrator to set the properties for your specific purposes



## Create History

The Create History wizard is located on the History Information and Maintenance group wizard and is used to create a history record for an outreach user.



In the **History Information and Maintenance** group, click the **Create History** wizard.

Enter the patron in the User ID field.

Use the **Item Search and Display** to locate an item and make sure it is the correct item type.

Copy and paste Item ID from the bibliographic information into the Item Id on your create history screen

History

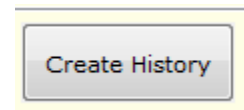
Identify user  
User ID: 20053000712062

Identify item  
Item ID:

Title:  
Author: Status: UNSELECT  
Library:  
Call Number: Copy:  
Interest: Item ID:  
 Repeat: Interval days: 1460  
Date charged: Date created:  
Date shipped: Date modified:  
Times charged:

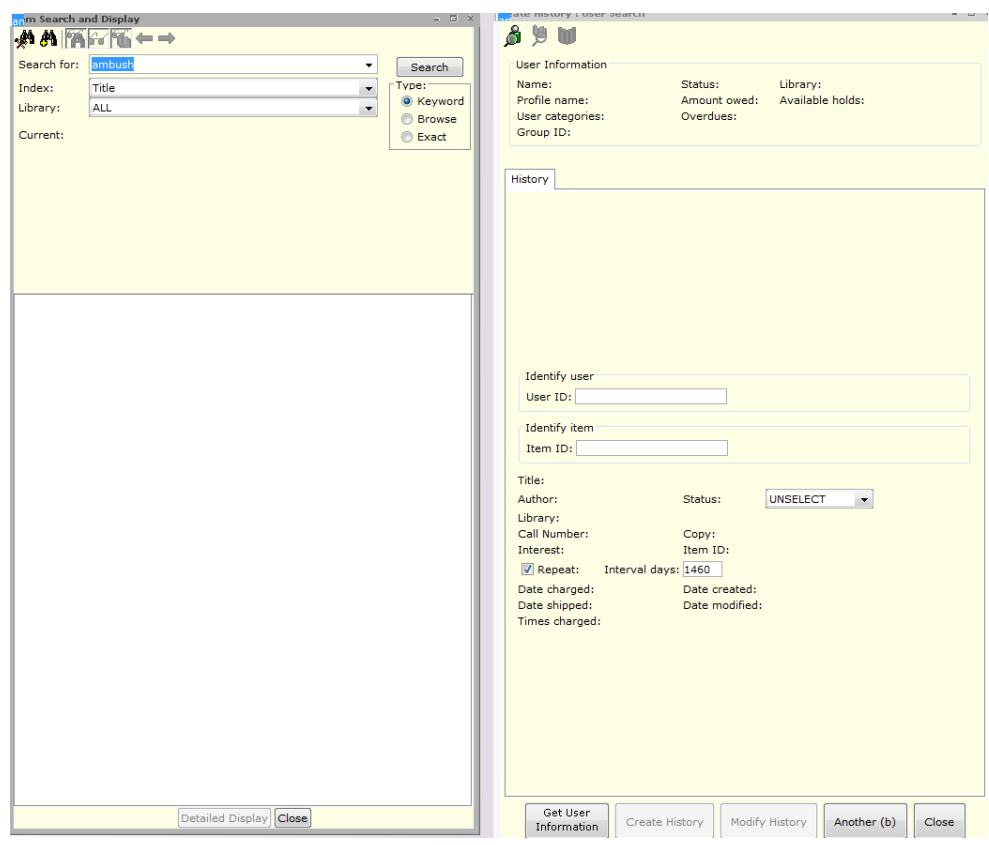
When the item displays on the **History** tab, select a status in the **Status** drop-down list. The selections are **SELECT**, **REJECT**, and **UNSELECT**. (we set our properties beforehand and use the default)

**Create History.** A dialog box displaying Record Created displays. Click **OK** to close the box. *\*Note when you set your default properties, this is where the information appears*

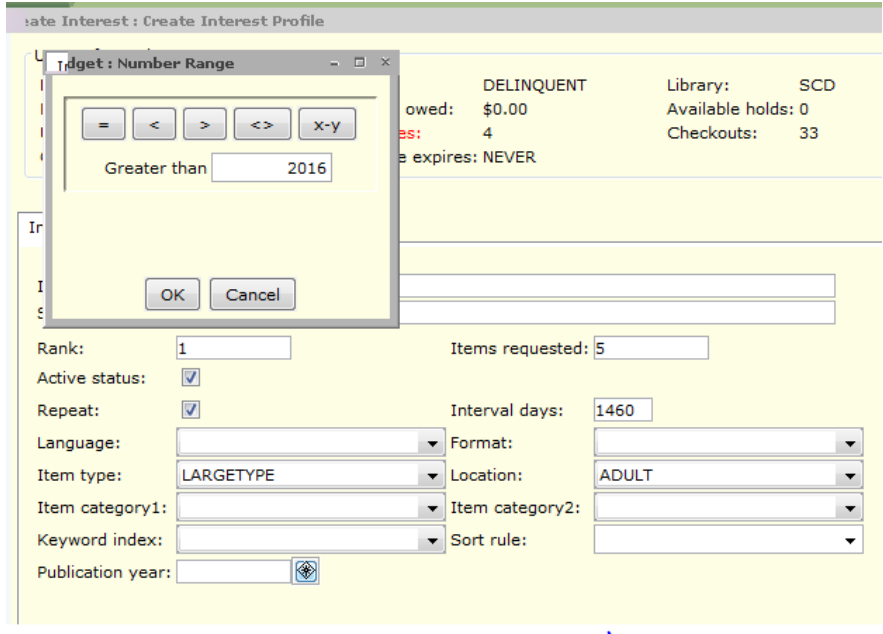
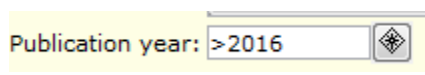




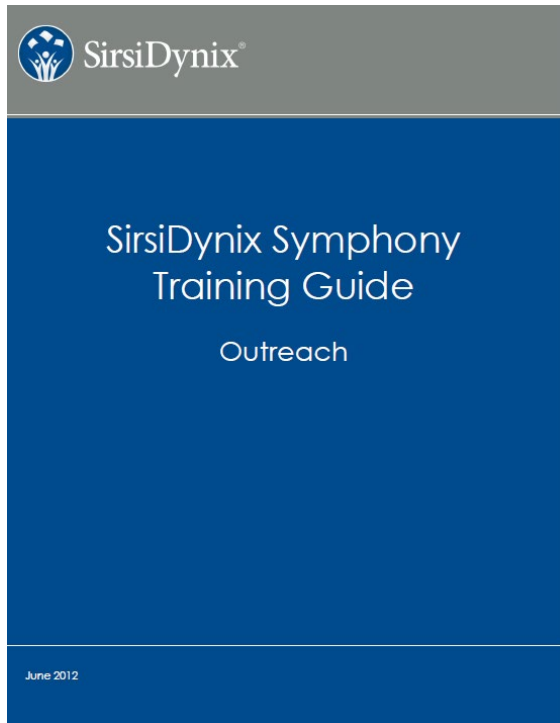
If you have multiple entries, splitting the screen will help streamline the process.



If your Patron is an up-to-date reader you can bypass this whole process when setting up the reader preferences in **Search Interest** by using the Publication YEAR feature.



The Help feature and the SirsiDynix Training Guide provide excellent documentation and instructions.

The screenshot shows a web-based help system interface. On the left is a navigation pane with a tree view under 'Outreach Services'. The 'Create History Wizard' item is highlighted in red. Below the tree are buttons for 'Contents', 'Index', 'Search', and 'Favorites'. The main content area on the right is titled 'Create History Wizard' and contains the following text:

The **Create History** wizard is located on the **History Information and Maintenance** group wizard and is used to create a history record for an outreach user.

For example, a library user may have heard about an interesting book on a historical figure but is not interested in reading additional works on this topic. Creating an interest record is unnecessary in this case, since the patron wants to read only a single specified title.

**To create a history record for an outreach user**

- 1 In the **History Information and Maintenance** group, click the **Create History** wizard.
- 2 On the **User Search** window, scan the user barcode in the User ID field.
- 3 Scan the Item ID, or use the Item Search helper to locate an item.
- 4 When the item displays on the **History** tab, select a status in the **Status** drop-down list. The selections are **SELECT**, **REJECT**, and **UNSELECT**.
- 5 Type or select other information as needed, and click **Create History**. A dialog box displaying **Record Created** displays. Click **OK** to close the box.
- 6 To view the bibliographic information, call number and order information for the history record, click the **Display Description** helper.

After creating a history record, select one of the following options.

- **Modify History** to modify the record you just created.
- **Create Another History** to create a history for another user.
- **Close** to exit the wizard.

**Related topics**

[Overview](#)  
[Create History Wizard Properties](#)