Circulation

Sierra Training Manual

Overview

Sierra Circulation allows staff to do the following: check out items, check in items, search all patrons, place holds, maintain hold queues, maintain course reserves lists, manage fines and bills, and perform other Circulation-related functions.

Log In

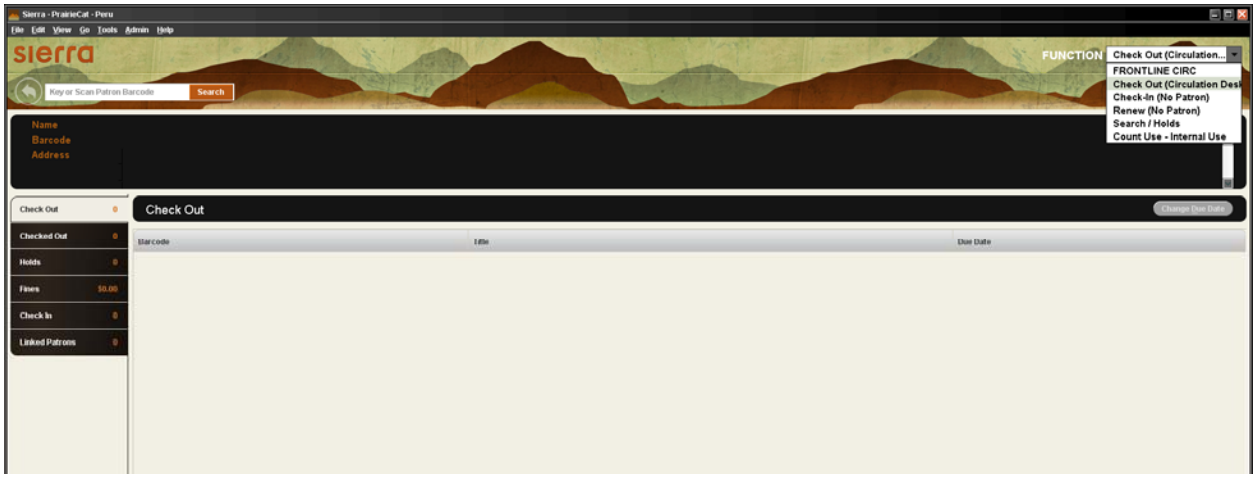
- Double click on the Sierra icon on your computer's desktop:

- When the *Login and Password* dialog box appears, enter your Sierra Circulation login name and password. Your assigned login and password determine the privileges and functions you can perform in Sierra.

- Click the **OK** button or press the <Enter> key twice.
- This connects you to the server and loads the Sierra Circulation software.

Sierra Circulation Window

Once logged into Sierra, the circulation window opens. The right side dropdown box lists the various functions assigned to the login.



Custom Settings and Preferences

Many Sierra functions are customizable (for example: screen and text colors, font and font size, new record template creation and maintenance, print templates, and a number of other Sierra functions.)

Changing the font size and screen color is a decision of the local library

New Record Templates

The Sierra system uses new record templates to create new records. A new record template can be configured by the local library to prompt the staff member to fill in specific fields. A new record template can also be configured by the library to contain default data in certain fields which is automatically inserted into the record during the new record creation process. The library may configure an unlimited number of new record templates in the Sierra System.

Record Structure

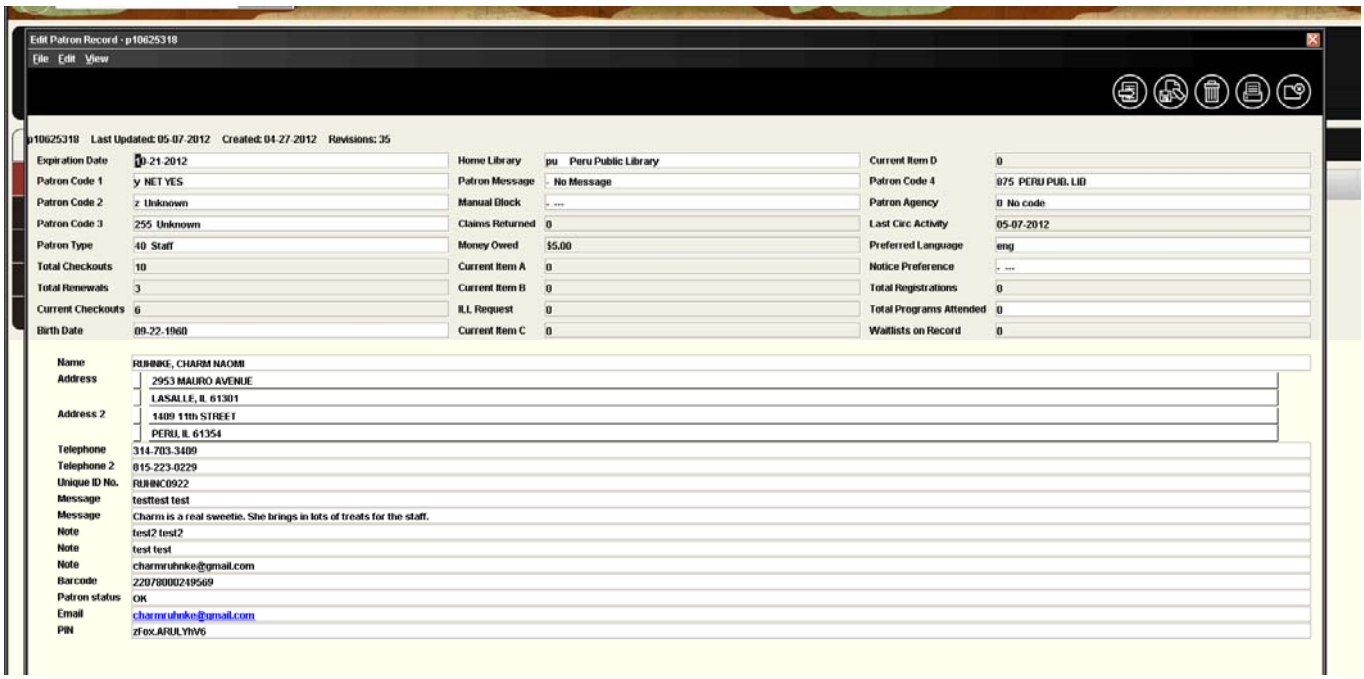
Review Patron Record Fields

Along the top, at the far right, are icons for Editing, Save, Delete, Print and Close.

Tip: Always Save before closing the patron's record.

The first half of the Patron record are fixed-length fields, containing information on expiration date, birth date, money owed, notice preference and last circ activity.

The record's second half are variable-length fields, containing the patron's name, address, messages, notes, email and barcode.


Edit Patron Record - p10625318
File Edit View
p10625318 Last Updated: 05-07-2012 Created: 04-27-2012 Revisions: 35
Expiration Date 05-21-2012
Patron Code 1 y NET YES
Patron Code 2 z Unknown
Patron Code 3 255 Unknown
Patron Type 40 Staff
Total Checkouts 10
Total Renewals 3
Current Checkouts 6
Birth Date 09-22-1960
Home Library pu Peru Public Library
Patron Message - No Message
Manual Block - ---
Claims Returned 0
Money Owed $5.00
Current Item A 0
Current Item B 0
ILL Request 0
Current Item C 0
Current Item D 0
Patron Code 4 075 PERU PUB. LIB
Patron Agency 0 No code
Last Circ Activity 05-07-2012
Preferred Language eng
Notice Preference - ---
Total Registrations 0
Total Programs Attended 0
Waitlists on Record 0
Name RUHNKE, CHARM NAOMI
Address 2953 MAURO AVENUE
LASALLE, IL 61301
Address 2 1409 11th STREET
PERU, IL 61354
Telephone 314-703-3409
Telephone 2 815-223-0229
Unique ID No. RUHNC0922
Message testtest test
Message Charm is a real sweetie. She brings in lots of treats for the staff.
Note test2 test2
Note test test
Note charmruhnke@gmail.com
Barcode 22078000249569
Patron status OK
Email charmruhnke@gmail.com
PIN zFox.ARULYhV6

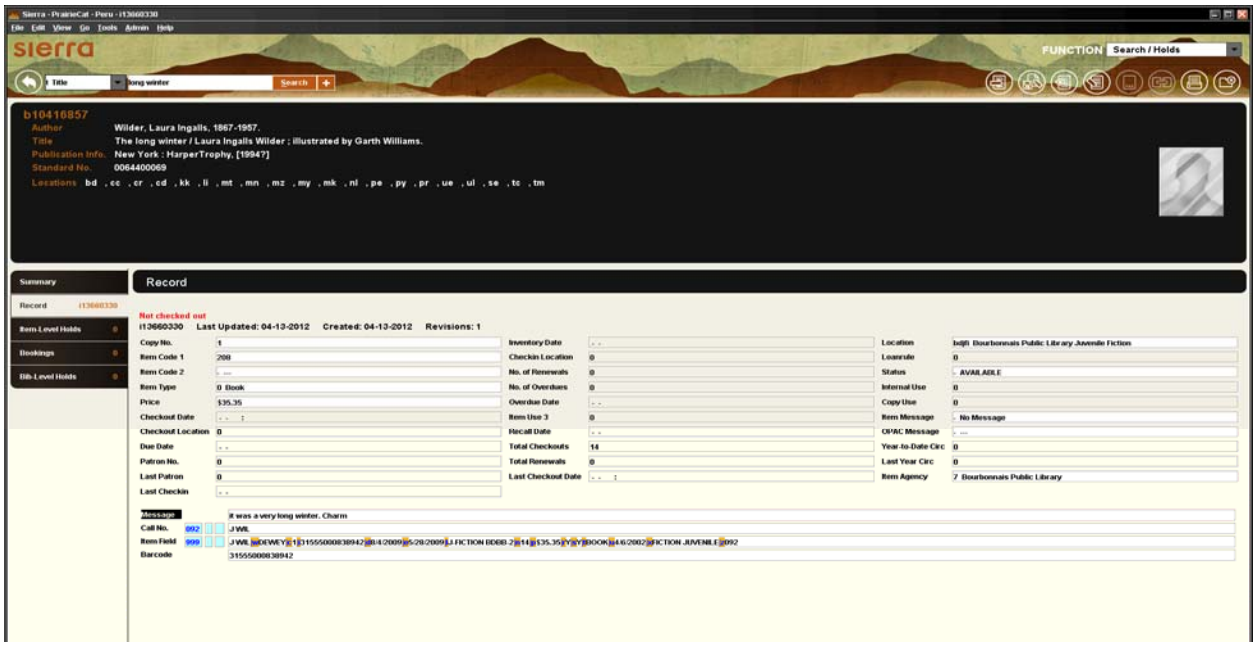
Review Item Record Fields

Along the top, at the far right, are icons for Insert Field, Save, View, Edit, Summary, Export, Print and Close.

Tip: Always Save before closing the item record if you made any changes.

The first half of the Item record are fixed-length fields, containing information on location, item type, # of renewals and overdues, status, checkout date, total checkouts and last circ activity.

The record's second half are variable-length fields, contacting the call #, item field and barcode.



Sierra Circulation Modes

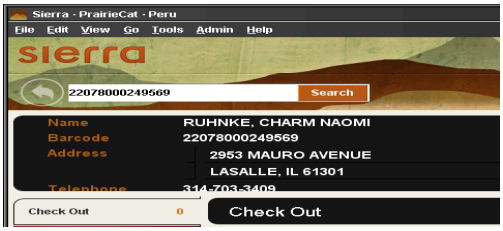
Circulation Desk Mode

Circulation Desk mode is where most of the daily circulation functions take place, check in, check out, paying fines, creating a new patron record.. Pull down the **Function** list on the right and choose **Check in (Circulation Desk**) Mode to open.

Patron Records

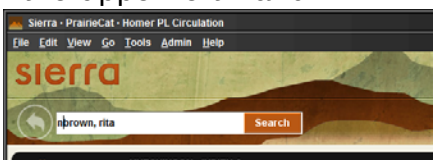
Search for a Patron record

Patron records may be searched by any indexed field in the Patron record.



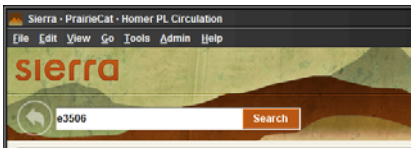
1. Go to Check Out (Circulation Desk) function

2. Type or Scan the patron barcode into the query box in the upper left-hand portion of the screen.

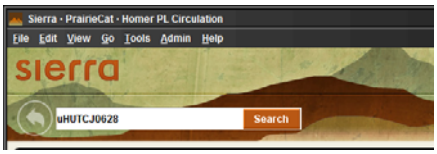


3. Or Type the letter "**n**" (to designate the name index) and search by the patron's **last name, first name.** Do not insert a space after the letter "n". This searching option informs the system that it should search the Name Index instead of the Barcode Index.

4. Or Type the letter "**e**" to search the personal information index (address, telephone or email). Do not insert a space after the letter "e." This searching option informs the system that it should search the Personal Information Index instead of the Barcode index. Personal information reads left to right and is a phrase search.



5. Or Type the letter "**u**" to search the Unique ID (formerly AltID). Do not insert a space after the letter "u." This informs the system that it should search the Unique ID index.



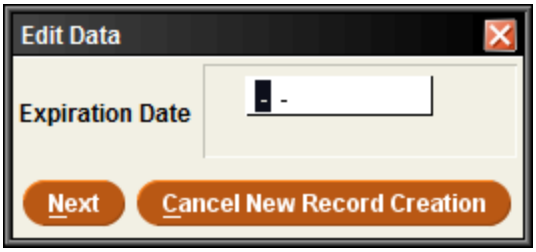
6. After typing your search term, press the <*Enter*> key or click the **Search** button. If necessary, select the appropriate index from the drop down list of **Name**, **Barcode**, or **Record number**. Type the appropriate data into the query box and press the <*Enter*> key (or click the **Search** button)

7. From a browse screen of a list of Patron records, double click on the line for the selected patron name or highlight the line for the patron name and click the **Select** button.

Create New Patron Record

1. Search the Sierra database for the patron. If there isn't already a patron record, create a new patron record.
2. Click the **New** Patron Record button or use the dropdown menu **File | New Patron**
3. Select a new record template from the preferred list or use the default new record template, if that is the appropriate template. Patron Record templates can be selected as preferred templates in the dropdown menu **Admin | Settings | Record Template.**

4. Insert patron information in the fixed- and variable-length fields as prompted by the new record template. To skip a field, click Next

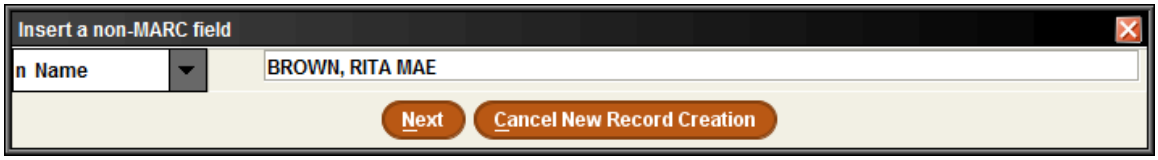


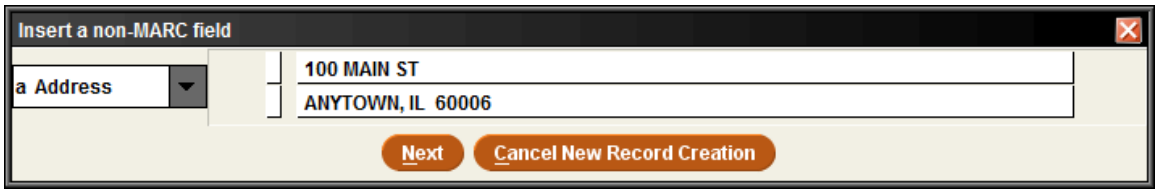
[

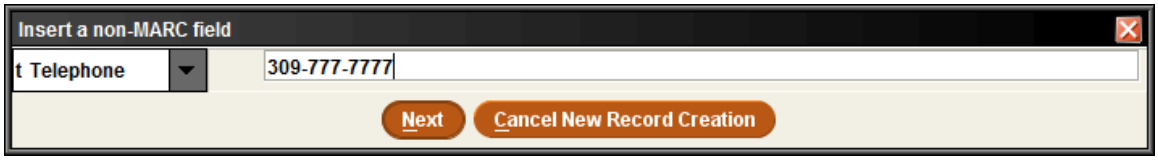
Tip – to enter the expiration date, type either t or c in the box. Typing t enters today's date, and you can change the year. Typing c displays a calendar to choose the expiration date.

5. Double-click with the mouse in the white part of the desired field to display a list of valid codes and/or meanings for that specific field, and click on the appropriate line for the chosen field to select it.

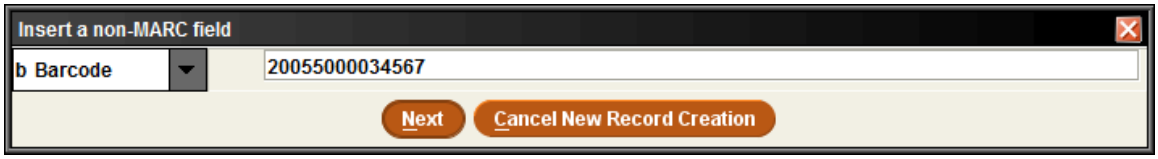
6. Type the necessary data into the white area of the variable-length field display box.







Note: enter primary telephone number in Telephone. Ten digits are required with hyphens (including area code). Use Telephone 2 for alternate numbers.

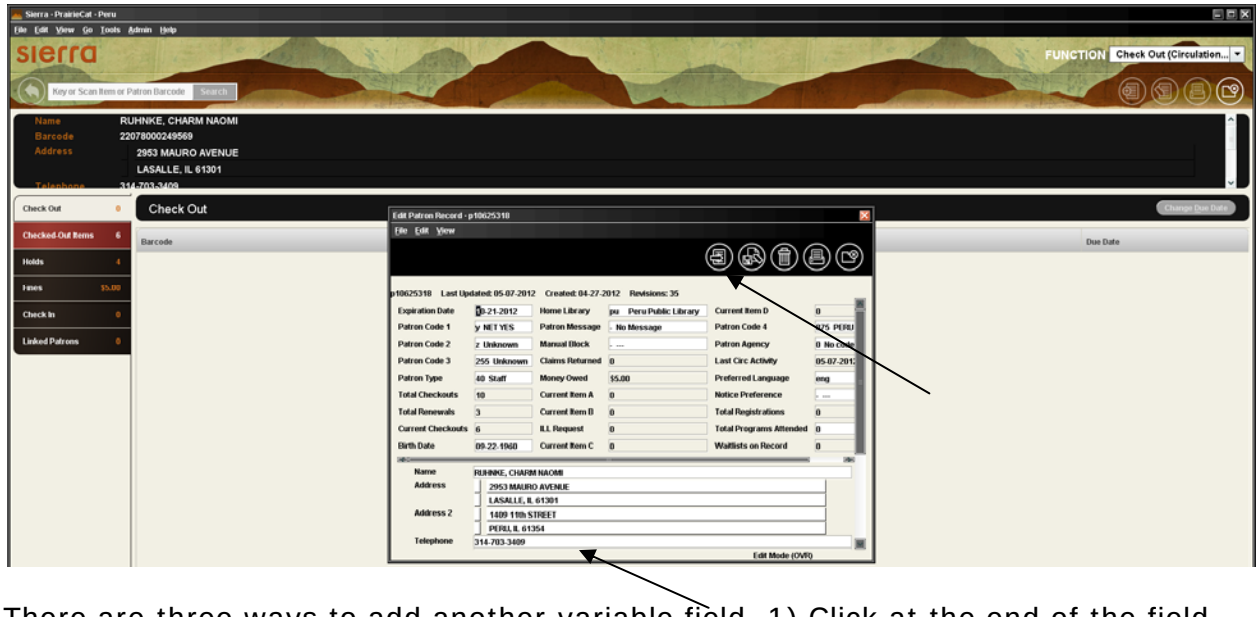


Scan or type 14 digit barcode in barcode field.

Type the last four digits of the barcode as the user's PIN, then enter the four digits again to confirm.

Once you have added the PIN and hit OK, it will appear as an encrypted code. To edit the PIN in the future, you will need to highlight the encrypted text and replace it with the last four digits of the barcode again.

Adding Another Variable Length Field



There are three ways to add another variable field. 1) Click at the end of the field above where you want to insert a field, and press <enter>. A field will be entered with a blank pink field label and question mark. The "?" indicates that you must insert a valid field tag which is appropriate for the field to be inserted. Or 2), you can right click and choose Insert Field. Or 3), you can use <control>I. Both of these latter methods will open the Insert a Non-MARC Field box at the top of the record.

List of variable fields and their codes:

n=name

a = address

h = address 2

t = telephone

p = telephone 2

o = mobile telephone

s = alias

u = unique ID No. (Public libraries should enter Alt ID in this field)

m = message (displays as pop up for circulation staff)

x = note (displays in record but does not pop up for staff)

b = barcode

c = patron status

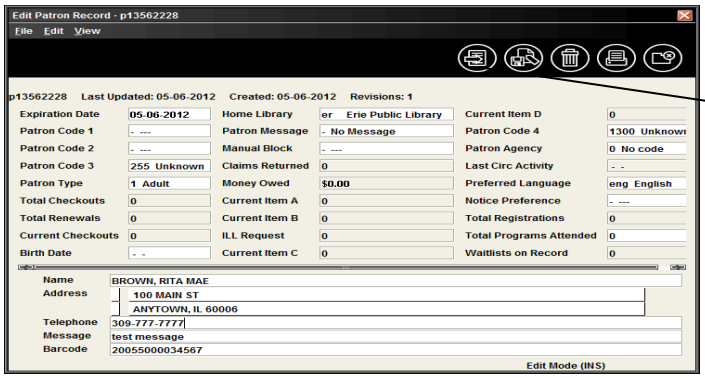
z = email

```
= = PIN
```

To move a field within the same field group (i.e.: rearrange the displayed order of several NOTE fields), position the cursor inside the field to move, right-click on the mouse, and select" Move Up", "Move Down", or "Move to Top", or "Move to Bottom of Group" from the pop-up menu.

Check the other fixed fields to add other desired information such as Notice Preference.

Click the Save button when you have finished entering all the needed data in the patron record:



Save button

Copy a Patron Record

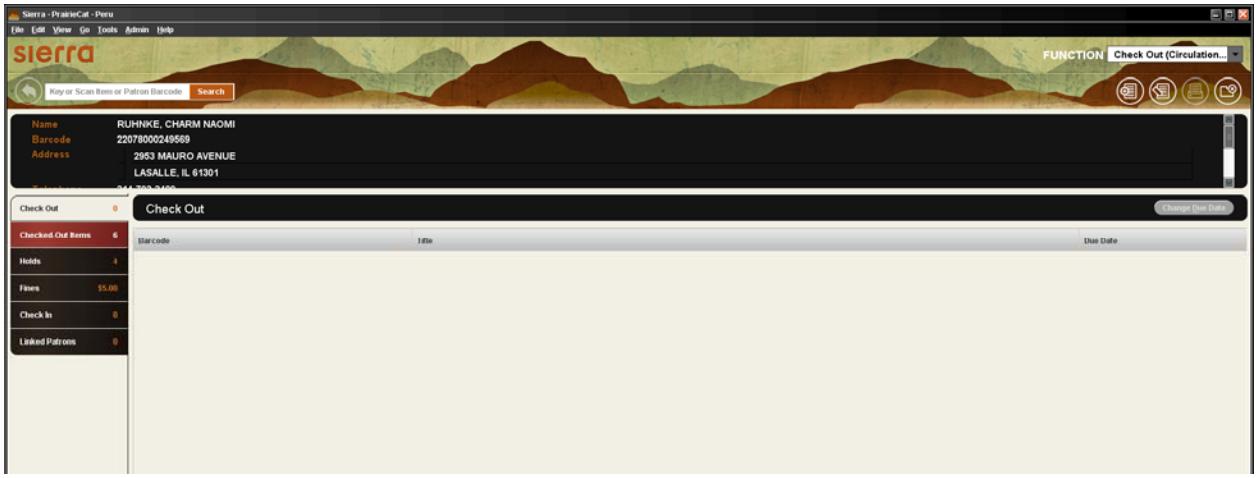
It is possible to create a new Patron record by copying an existing record. This is useful for entering multiple patrons from a group (for example: a classroom or a family).

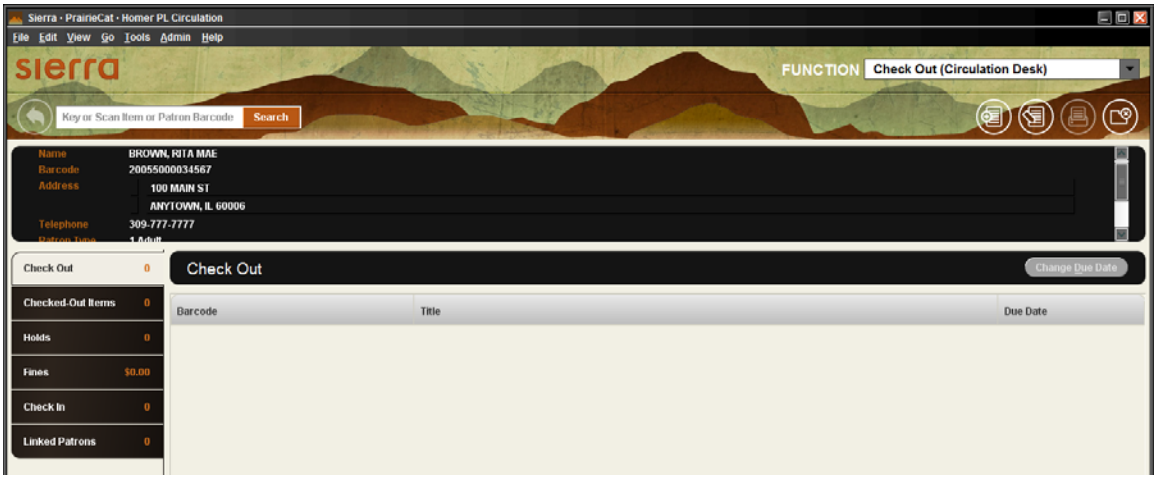
- Retrieve a Patron record by searching by name or any other appropriate field. If a browse list is presented, select the appropriate line by double-clicking on the line or by clicking in the "Select" button. Then, click on the **Edit** icon on the toolbar button. With the selected Patron record open, use the dropdown menu **Edit | Copy Record** to copy the selected record and simultaneously create a new Patron record from the selected record.
- The data from the original record will be copied into a new record according to the fields you have selected. It is necessary to edit the new Patron record for changes as appropriate. When all changes have been completed, click on the **Save** icon on the toolbar.

Check Out

Check Out Tab

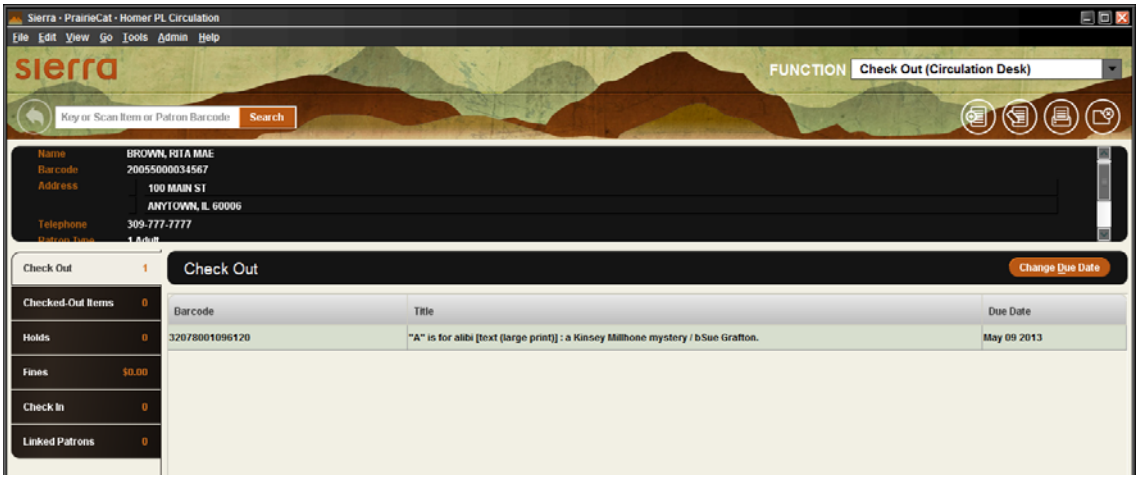
1. To check out an item, retrieve the Patron record using any of the methods above.
2. A brief version of the Patron record displays in the upper part of the display screen. Along the record's left side are tabs with allowable actions: Check Out, Checked Out Items, Holds, Fines, Check In and Linked Patrons.





3. Scan or type the **item barcode** in the blank field in the upper left-hand corner of the screen.

4. After checking an item out to a patron, it is possible to override the system-selected Due Date. To override the system-selected Due Date, click on the **Change Due Date** button. Select an appropriate due date from the calendar box presented and click the **OK** button. It is possible to retain the changed due date by selecting the checkbox at the bottom of the calendar display.

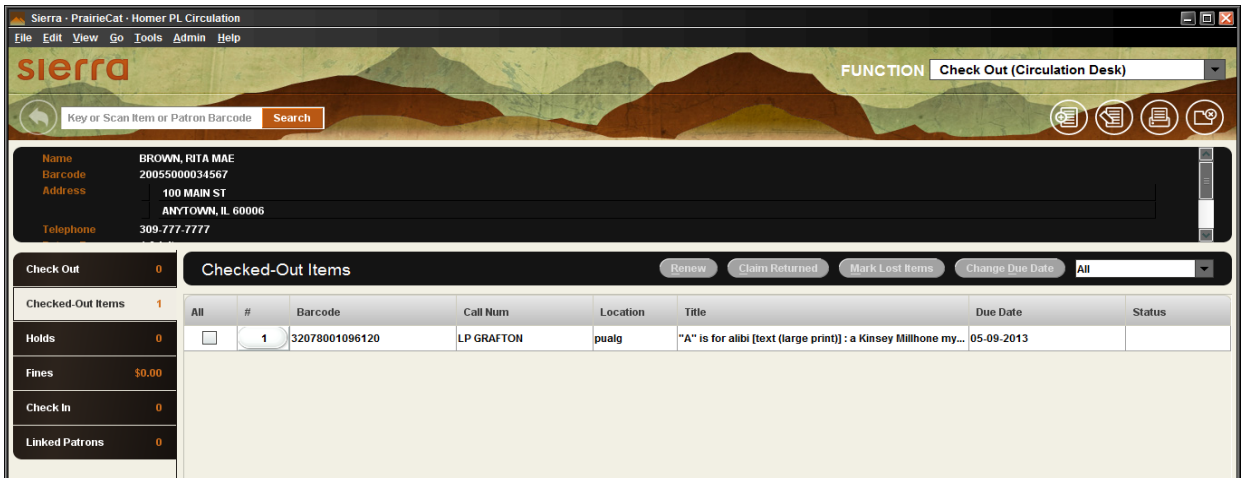


5. It is essential to close the Patron record to complete the checkout transaction and to move checked out items into the **Checked-Out Items** tab. Use **<Alt> +Q** or click the **Close** icon in the toolbar to close the patron's record. Closing a Patron record assures that the Patron record does not unnecessarily remain "in use" and also protects the privacy of patron information.

Once the patron record is closed, the items move from **Check Out** to **Checked Out Items**.

Checked-Out Items Tab

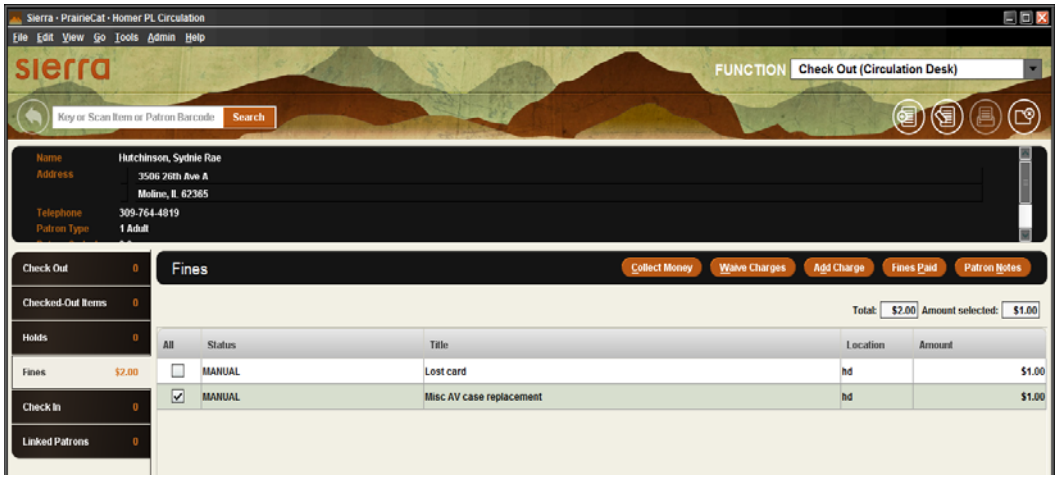
Click "**Checked Out Items**" tab on the left to display the **Checked-Out Items**. Several functions may be performed using the **Checked-out Items tab**, including



Renew, Claim Returned, Mark Lost Item, and Change Due Date. .

Fines

Within a Patron record, it is possible to view current fines, view a history of fines paid, manually add a charge, waive charges or collect money. The **Fines** tab displays in a warning color if a patron's fines exceed a library-defined limit.

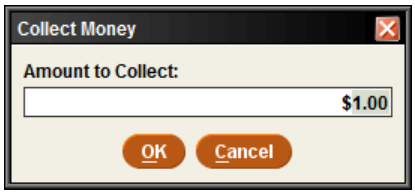


Collect money

1. To collect money for an unpaid fine, retrieve the Patron record using any method and click the **Fines** tab

2. Select the appropriate fine(s) by clicking on and highlighting the appropriate line(s).
3. Click the **Collect Money** button. The checkbox at the left side may also be used to select the appropriate fine or fines.

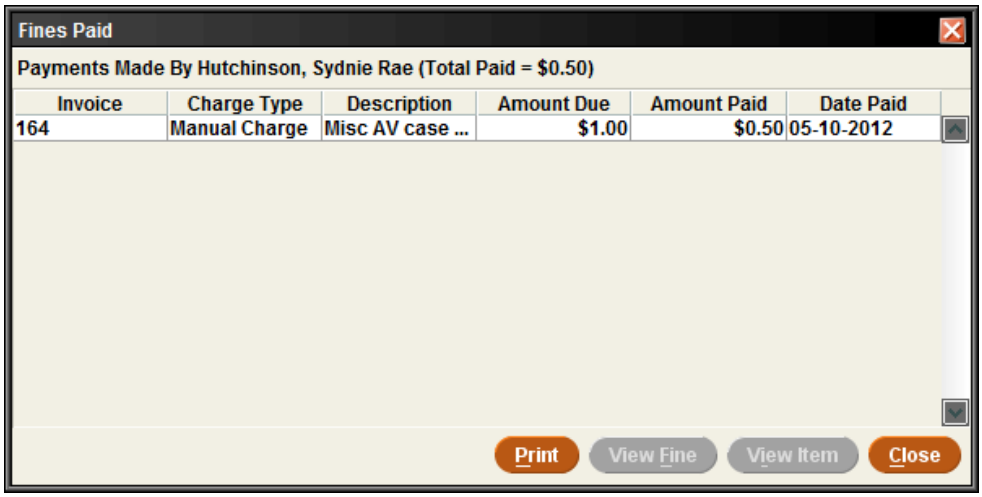
The system displays the total amount owed for that particular fine but it is possible to accept partial payment of a fine or bill. This is determined by library policy. There are no special settings to accept partial payments. If a patron chooses to pay a partial amount of a specific fine, the system will ask if the remaining amount of the fine or bill should be waived. Only staff who is authorized via their initials and password will be permitted to waive fines.



4. Enter the amount being collected/paid into the box, click **Ok**.
5. If the **Payment Types** table has been enabled, the system will propose the option to enter the type of payment received (for example: cash, credit card, check, etc.).
6. Printing a receipt for the patron is an optional feature. During the fine collection process, if a receipt is desired by the patron, click on the print button at the bottom of the payment display box. This is an option, and may be performed as needed.

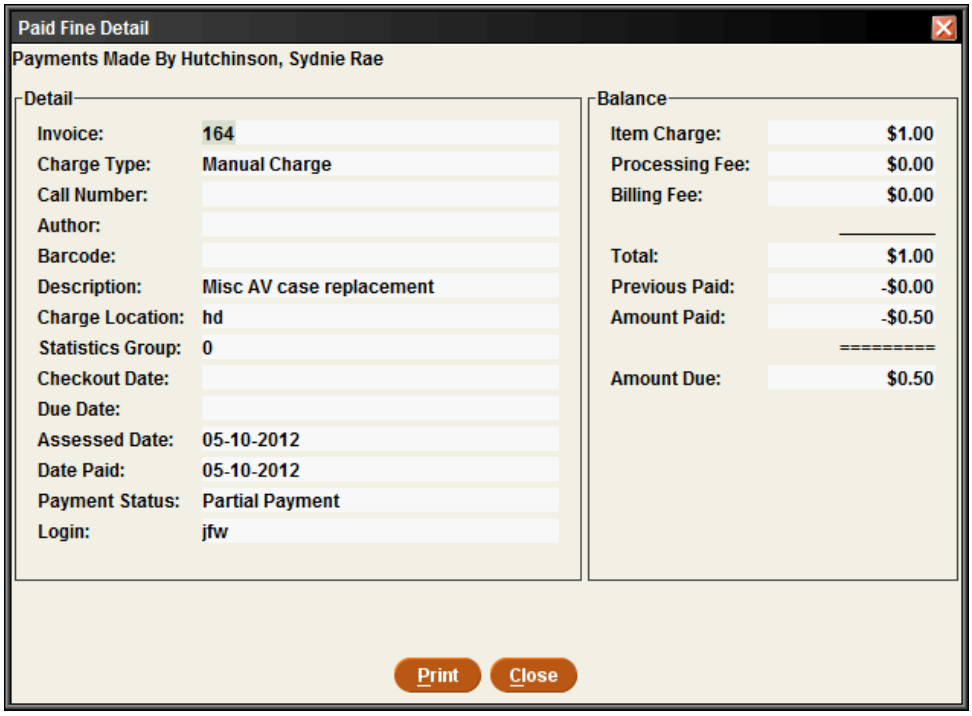
View Fines Paid

1. To view the fines paid by the patron, click the **Fines Paid** button within the Fines Tab.



2. To view details about the item pertinent to a fine paid, highlight the appropriate line and click the **View Item** button. The **View Item** option is not available for manual charges since such charges are normally not associated with a specific item. It is possible to print the resulting screen with the **Print** button.

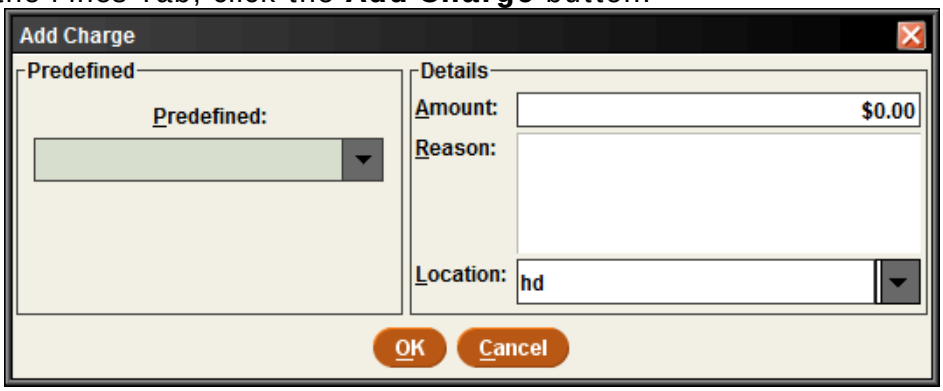
3. Click the **View Fine** button to view the details of a fine or to reinstate a fine.



Add a Fine (Manual Charge)

This function is used to add miscellaneous charges to a patron's account, anything not automatically generated from an overdue item. Examples are: Book Drop Fee, Damaged Book, Hold Not Picked Up, etc.

1. In the Fines Tab, click the **Add Charge** button.



2. Click the **Predefined** drop-down menu and choose the desired charge. The reason and amount will be automatically entered. The amount can be adjusted as needed.
3. If you don't want to use a **Predefined Charge**, you can simply add a charge and type in the **Reason** for the charge**. A reason is required to assess a manual charge.** Click **OK.**

Waive Fines

1. To waive a fine, select the appropriate fine or fines and click the **Waive Charges** button.
2. Only users authorized to waive fines will be permitted to complete this function.

Renew Material

Renew with Patron

1. Retrieve the Patron record and click on the **Checked Out Items** tab.
2. Select the item to be renewed from the displayed list by highlighting the appropriate line and then click the **Renew** button.

Renew without Patron

The **Renew** mode can be used to renew items without accessing a patron record:

1. Change the current mode to **Renew (No Patron)** in the function box
2. Two methods of renewing an item are possible:
    - Search by Item record number, and then select the item to be renewed
    - Scan or type in the barcode of the item to be renewed
3. Click the **Close** button

Holds

Holds may be added to a Patron's account from their **Patron Record** tab. Or holds may be placed in the **Search / Holds** function. It is also possible to cancel or modify existing holds in both places.

The number of holds already on a title displays from the **Holds / Bookings** tab summary, in the last column to the right on the **Holds / Bookings** *tab*.

If the patron already has a bibliographic-level hold on this title, the system will not accept the hold.

There are two types of holds:

- Bibliographic level holds, which are also called "Title level" or "Copy Returned Soonest" holds. **The first copy checked back in will be selected to satisfy the hold. This is the level of hold that should be used normally for all patron holds.**
- Item level holds is the second type. For item level holds, only a specific copy will satisfy the hold (for example, a particular volume, or particular autographed copy, etc.) This level of hold should only be used when you want to retrieve a specific copy, such as to have it returned to technical services for repair.

Holds can be placed on:

- A title or item that is checked out
- A title or item that is not checked out
- A Bibliographic record with an attached On Order record

Holds *cannot* be placed on:

- An item currently checked out to this patron

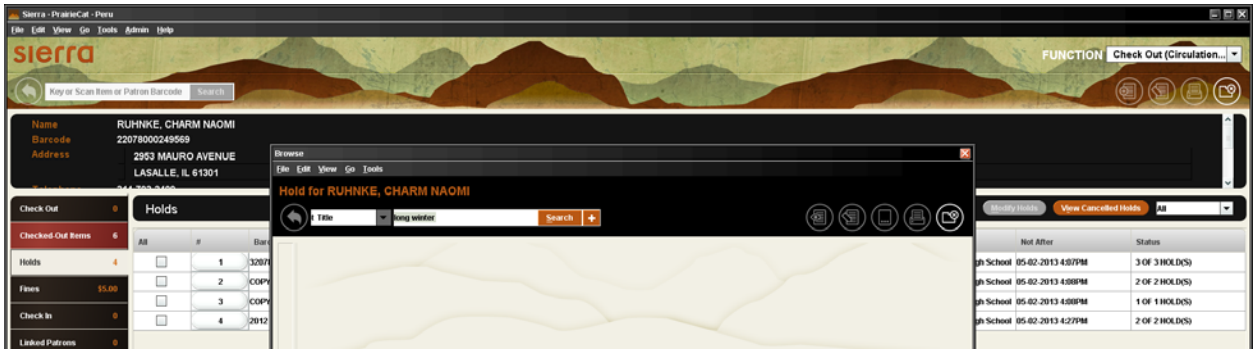
- An item with status o (“library use only”)
- An item pointing to a Loan rule whose “Code” element is “N” (non-circulating)
- An item pointing to a Loan rule whose HOLDABLE element is set to “N” (no)

Place Bibliographic (Title) level holds - Copy returned soonest

It is possible to place a bibliographic-level hold from **Check Out (Circulation Desk)** mode or from **Search / Holds** mode on the navigation bar.

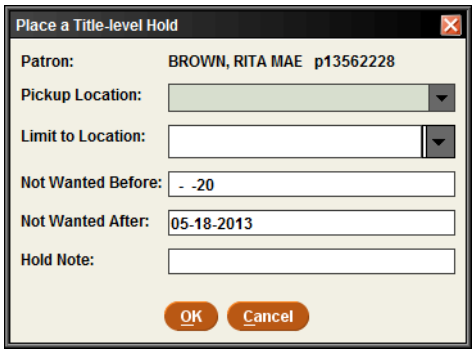
Placing a hold from the Check Out (Circulation Desk) mode:

4. Select **Check Out (Circulation Desk)** mode r
5. Retrieve the Patron record using any method.
6. Click the **Holds** *tab*
7. Click the **Add Holds** button
8. A browse window pops open; retrieve the desired Bibliographic record by performing a search, using an appropriate index (author, title, subject) for searching.



9. Select the record for the request by highlighting the appropriate results line in a browse screen then clicking **Select**. Or double click on the wanted item. If there is a direct hit for a title, the Bib record automatically displays.
10. From the **Summary** tab list of attached Item records, click the **Hold Copy Returned Soonest** button.

Type in or select the desired hold parameters for pickup location, not wanted after date and click **OK.** Hold parameters are configured in Circulation Parameters.



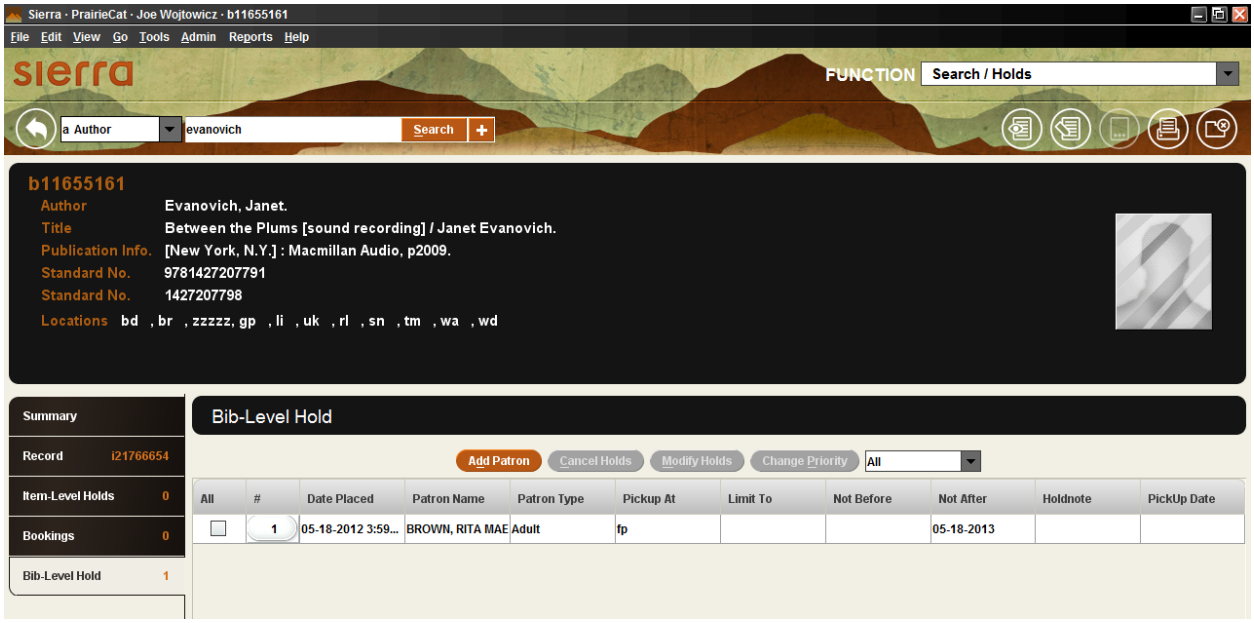
Placing a bibliographic level hold from Search / Holds mode

1. Go to **Search / Holds** mode on the Function box on the right side of the screen.
2. Retrieve the Bibliographic record by searching an appropriate index (author, title, subject) for searching.
3. If the search results in a browse list, select the Bibliographic record on which the hold will be placed by highlighting the line of the appropriate title. If the search results in a direct hit for only one Bibliographic record, the Bibliographic record will display on the screen).
4. From the **Summary** tab list of Item records, click the button for **Hold Copy Returned Soonest**.
5. Retrieve the desired Patron record by using the **Add Patron** button and searching for the patron
6. Type in the desired hold values for pickup location and not wanted after date and click **OK**

- If no Item records for this title are eligible for hold placement (for example, they all contain a status of “Library Use Only”), the system will display a “REQUEST BLOCKED” message. The system will place, instead, a bibliographic-level hold. By using the bibliographic level hold option, if the library later changes the

status of any attached item record or acquires new items for that title for which holds may be placed, the HOLD will be fulfilled. If item level holds are placed, only that particular item may satisfy the hold and if that item becomes unavailable, the hold will never be satisfied.

- The number of holds already on a particular title displays on the summary tab on the left. Click on the Bib-Level Hold tab to display the current holds.



If the copy being held has a Status of AVAILABLE (meaning on the shelf and available to be checked-out), the system can print a paging list (formerly known as the picklist) so that staff may retrieve the hold and place it on the hold shelf for the patron. The item must be scanned at the desk, using "Check-In" mode, after which the system will generate a hold pickup notice.

- If the desired item cannot be located on the shelf, it is possible to change the item status to missing, and to place another bibliographic level hold for the patron. Changing the item status to missing places the item in the On Search File. The library will need to periodically create a list of missing items to determine disposition of missing items in the collection.

Place Item level Holds

It is possible to place an item-level hold from **Check Out (Circulation Desk)** mode or **Search / Holds** mode.

Placing an item-level hold from Check Out (Circulation Desk) mode:

1. Retrieve the patron record using any method.
2. Click the **Holds** tab in the patron's record

3. Click the **Add Holds** button
4. Retrieve the desired Bibliographic and Item record using an appropriate search index.
5. From the **Summary** tab of attached Item records, select the desired Item record by highlighting the line, and click the **Hold Selected Item** button.
6. Type in the desired hold parameters and click **OK**

Placing an item-level hold from Search/Holds mode:

1. Go to **Search/Holds** mode on the navigation bar on the left side of the display.
2. Retrieve the Bibliographic and Item record, using any appropriate search index.
3. From the **Summary** tab of attached Item records, select the desired Item record by highlighting the appropriate summary line of the Item record and click the **Hold Selected Item** button.
4. Retrieve the desired Patron record using the **Add Patron** button
5. Type in the desired hold parameters and click **OK**

Modify Holds

The hold parameters (for example: not-wanted-before or after dates, hold note, pickup location, etc.) can be changed by staff members. Holds can be modified from **Check Out - Circulation Desk** mode and **Search/Holds** mode. The procedure is the same in both modes:

1. Retrieve the Patron record (**Check Out Circulation Desk** mode) or Bibliographic and Item record (**Search/Holds** mode)
2. Select the appropriate **Holds** t*ab*.
3. Highlight the line or lines of the hold(s) to be modified.
4. Click the **Modify Holds** button to modify the required field of pickup location, the optional not-wanted-before date, the optional not-wanted-after date and the optional hold note. The Pickup Location is required. Other values are optional.

Cancelling Holds

Holds may be cancelled from **Check Out (Circulation Desk)** mode and **Search/Holds** mode on the navigation bar. The procedure is the same in both modes:

1. Retrieve the Patron record (**Check Out - Circulation Desk** mode) or Bibliographic/Item record (**Search/Holds** mode)
2. Select the appropriate **Holds** *tab*.
3. Highlight the line or lines of the hold(s) to be cancelled.

4. Click the **Cancel Holds** button to cancel all of the selected holds and to generate hold cancellation notices (if you have chosen to send notices for cancelled holds).

Viewing Cancelled Holds

When staff cancels a hold, there is an option to create a notice confirming the hold has been cancelled. This notice can be printed or emailed to the patron, this is a local decision.

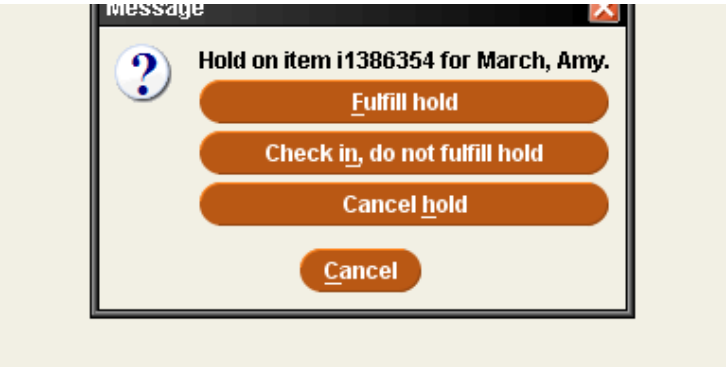
1. To view the patron's cancelled holds, to the patron's record
2. Choose the **Holds** tab, then choose the **View Cancelled Holds** button.
3. The screen displays a list of all holds cancelled on the patron record. This list can be printed.

Check in items with holds

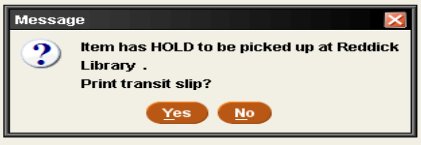
If a patron returns an item which has a hold on the item, Sierra Circulation will present a message alerting the staff that there is a hold on the item. It is possible to print a slip or wrapper to insert in the item before it is placed on the Hold Shelf.

At the exact moment an item which satisfies a hold is returned, the system sets the item status to **On Holdshelf** for patron pickup. If the item is on hold for another library, the item status will be changed to **In Transit**. See the In Transit section for more information. Depending on the library's notice settings, a hold pickup notice may be generated that night for the patron.

If the item has a hold, the screen display's this pop-up message. Staff has the option of **Fulfill Hold**, **Check in, do not fulfill hold** and **Cancel hold**. Choose **Fulfill Hold.**



Once **Fulfill Hold** is clicked, the screen displays this message. Click **Yes** to print a transit slip. Staff may be prompted to select



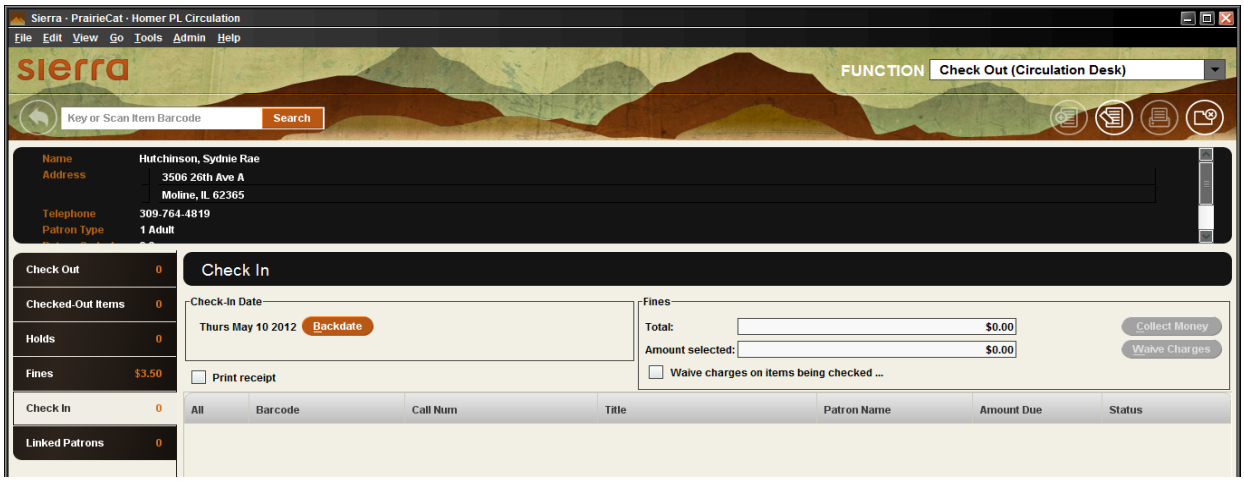
a printer, if the default printer has not been set. This is a local decision.

Check In

Check in with Patron Present

When an item is checked in using **Check Out - Circulation Desk,** the patron's record displays. This allows staff to perform patron-specific circulation functions such as collecting fines and viewing the history of fines paid while the patron is at the desk.

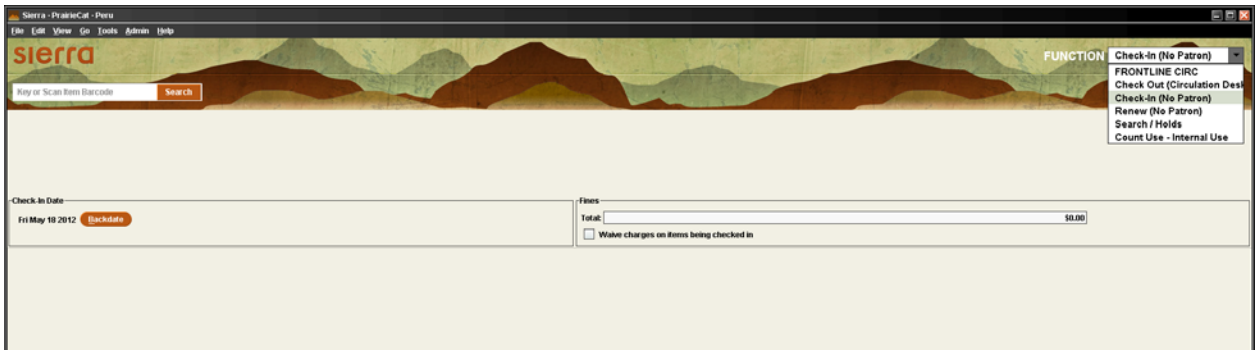
1. Go into **Check Out (Circulation Desk)**
2. Retrieve the Patron record and click on the **Check In** *tab*



3. Scan the item barcode to check it in.

- It is possible to backdate the check-in date by using the **Backdate** button. It is essential to click the Backdate button before scanning the item barcode to check it in
- It is possible to waive charges or to collect money immediately by selecting the checked in item and clicking the **Collect Money** or **Waive Charges** button, which will become active if the user is authorized to perform this function.
- If printing a receipt acknowledging the return of an item, the system will print the date & time, title, barcode, patron name, and record number on the receipt.
- It is also possible to check in items from different patrons using this same tab without closing the previous Patron record.

Check in without Patron Present



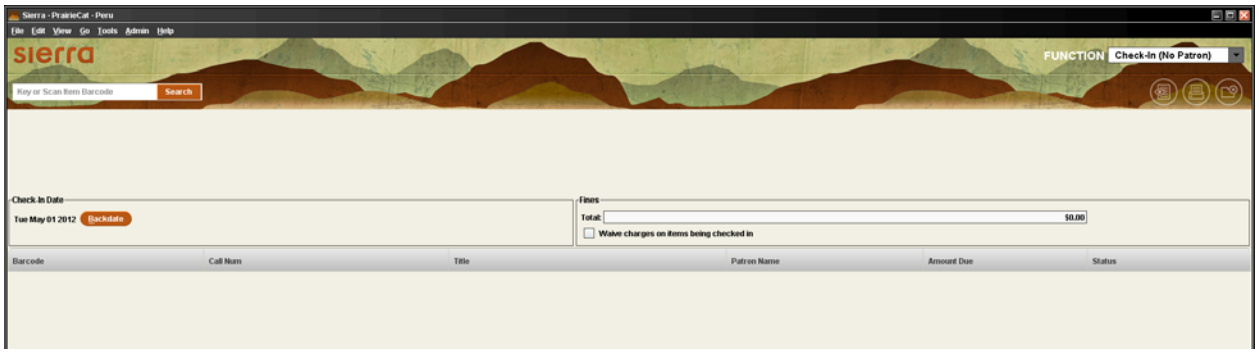
In the function dropdown box, choose Check In (No Patron) and begin scanning item barcodes.

Should the item be needed to fill a hold/request, the screen will display the appropriate pop-up screen.

Backdate Check Ins

To backdate checked in items (assign a return date earlier than the current date):

- Choose Check In (No Patron) from the Function box.
- Click the **Backdate** button before checking in the materials. Choose the desired date of return (checked in date) from the popup calendar. Depending on local



decision, the waive fines box may also be checked.

- Scan the item barcode (or type in the item barcode). Should the item be needed to fulfill a hold/request, the appropriate pop-up screen will appear.

Check in overdue items

If a patron returns an overdue item (i.e., the time of check-in is later than the Item record's DUE DATE field), Sierra Circulation generates a fine as established in the Loan Rules, and adds the fine to the charges assessed in the Patron record. .

Check in billed items

When a patron returns an item which is billed, the system will change the amount assessed in the Patron record to the amount specified by the library. The library has the following options:

Reduce the billed amount to:

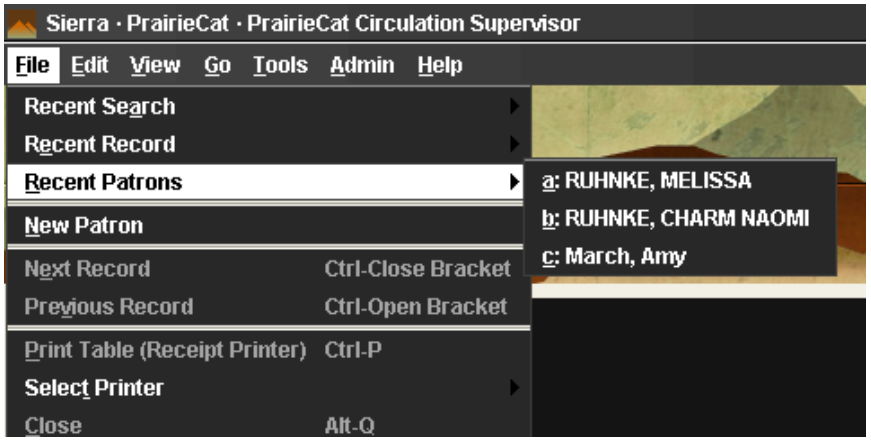
- the BILLING FEE
- the *greater* of the BILLING FEE or the overdue fine
- the *lesser* of the BILLING FEE or the overdue fine
- no charge; Sierra Circulation waives the fine automatically if this option is selected. Note that it may be necessary to enter your initials and password to waive the fine. The ability to waive fines is controlled by authorizations associated with individual initials and password.

This option is set in the Circulation Options, "**Check-In of Billed Item: Reduce bill to"** option.

Patron Record Maintenance

Recent Patron Record

To access the last 5 patrons without scanning their barcodes, go to **File** | **Recent Patrons**, then choose the patron. This option only appears when in the Check Out (Circulation Desk) function.

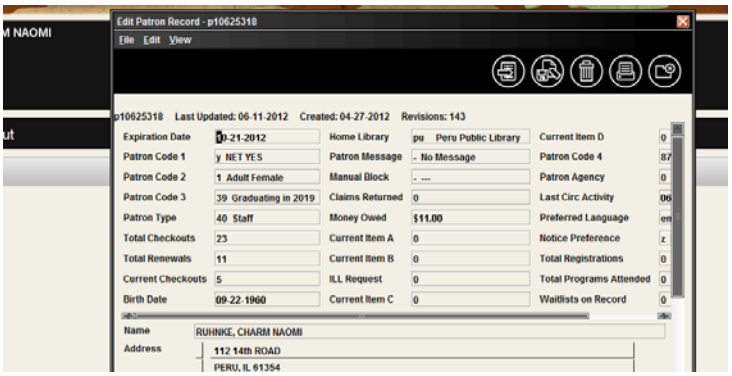


Locating and Searching by p Number

The software automatically assigns each patron a unique number, called the **p** number. The **p** number stays with the patron through any changes to their barcode, address, name, etc. The **p** number is in the patron's record and is also in the item record of their checked out items. Additionally, the **p** number may be located **Last Patron** field of the **item record**.

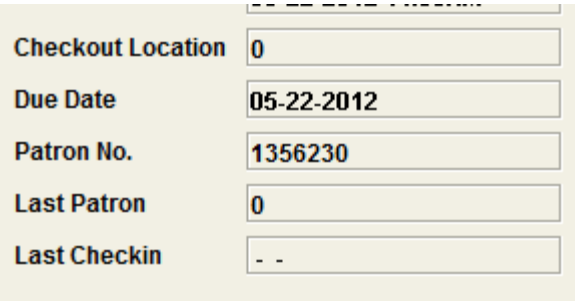
In the Patron record

1. Search for the patron in **Check Out (Circulation Desk)**
2. Click the **Edit Patron Record** icon
3. When the **Edit Patron Record** pop up window appears, the **p** number is at the top of the window.



In the Patron No. field of the item record

When the item record displays, the **Patron No**. is listed in the fixed fields, under the **Date Due** field. The number does not begin with p and only shows 7 digits.

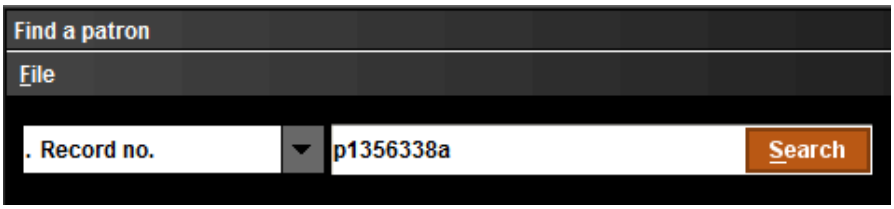


In the Last Patron field of the item record

Sometimes damage to an item is not discovered until after the item is checked in. The last patron to have borrowed that item can still be determined by using the **Last Patron** field in the item record. When the item record displays, the **Last Patron** field is listed just below **Patron No**. Again, the number does not display with a leading **p** and is only 7 digits long. PraireCat convention permits the last three patrons to be lists in the Last Patron field.

Searching by p number

1. To find the patron connected to the **p** number, in **Check Out (Circulation Desk)** click on the **Search** button
2. Select Search by **Record No.** from the drop down box
3. Type in the **p** number, if the number is onlr 7 digits, add the letter ‘a’ to the end of the digits to make 8 characters
4. Click **Search** button
5. The patron’s record displays



Adding Patron Messages

The circumstance for adding a pop-up message to a patron's account is a local decision. These messages display on the staff side (Sierra), not on the patron side.

1. Search the Sierra patron database for the patron.
2. Once the patron's account is displayed, click on the **Edit Patron Record** icon in the upper right side of the screen.
3. Next, click the **Insert Field** icon, in the upper right.
4. The variable field (**Insert non-Marc field**) box appears. From the drop down box, choose **Message**.
5. Type the Message in the long rectangular box. The message field can hold 10,000 characters. Include your initials and the date (mm/dd/yyyy).
6. Click **Ok** and then **Save**. The new message will appear the next time the patron's account is accessed by staff.

Removing Patron Messages

1. Search the Sierra patron database for the patron.
2. Once the patron's account is displayed, click on the **Edit Patron Record** icon in the upper right side of the screen.
3. Next, click in the Message field.
4. Right click once in the Message field. From the drop down box, choose **Delete Field**.
5. Click **Save**.

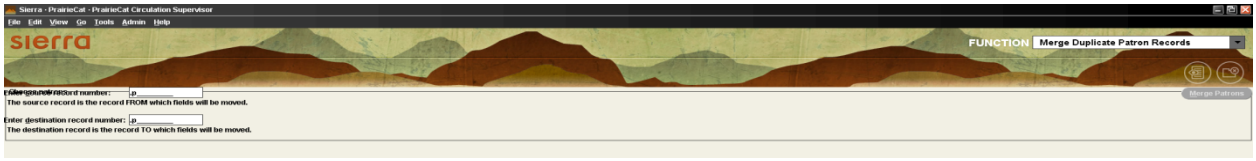
Merging Duplicate Patron Records – advanced login permissions

If two patron records were created for one patron, the two records can be merged.

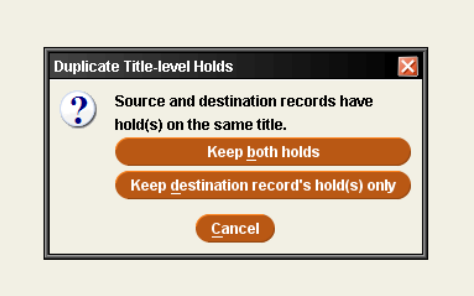
To merge two patron records into a single record, the **p** number is needed for both records.

Tip: it helps to print both patron records before beginning to merge the records.

1. Display the patron records to see the **p** number, choose **Edit Patron Record**. The **p** is at the top left, above the fixed fields.
2. Choose **Merge Duplicate Patron Records** from the Function box. If this choice does not appear, the login does not have merging permissions/privileges.



3. Two boxes appear, the first/top box is for the **p** number you want to remove, or merge into the Destination (second/lower) box.
4. Enter the **p** numbers for the patron records into the appropriate box.
5. Press **Enter** key
6. Confirm the merger. Clicking the Cancel button stops the merge.
   If either record has items on the hold shelf, the two records cannot be merged until the item is checked out to the patron.



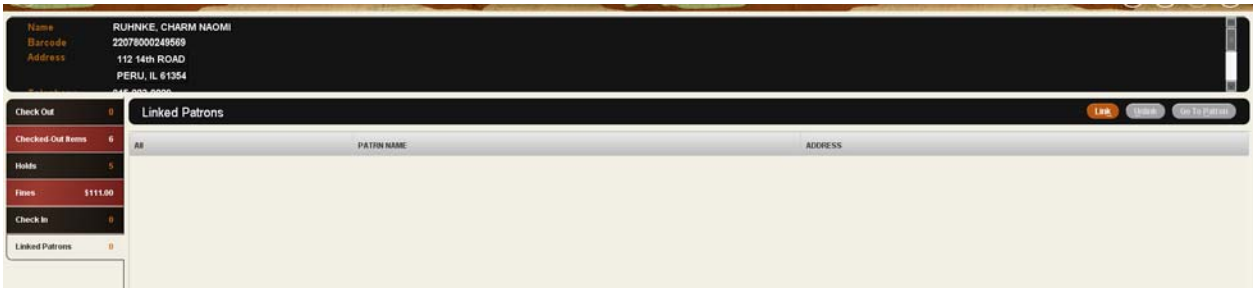
7. Add a note to the merged patron record indicating both **p** numbers, staff initials, library name and date.

Linking Patrons – Local Decision

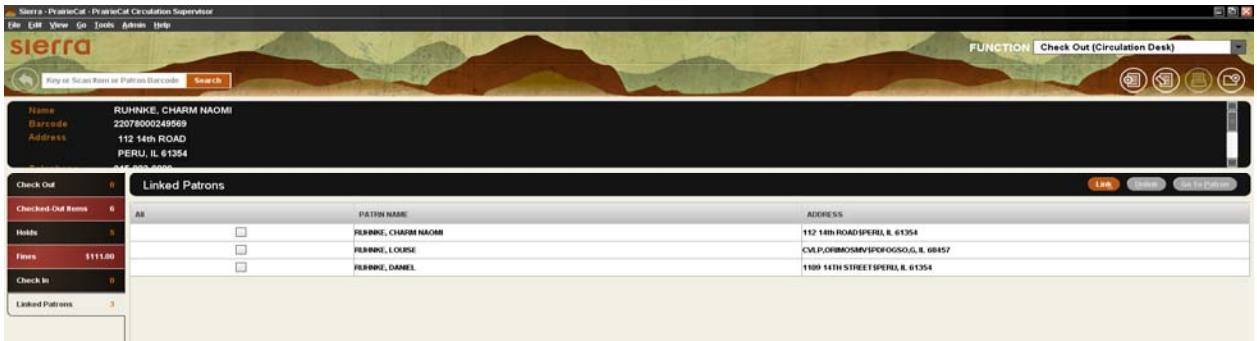
Linked patrons may be used to link family groups, university graduate assistants, or for any other purpose deemed useful by the library. Using this option is a local decision.

Note: if you link Patron A to Patron B who is already linked to multiple patrons (Patrons C-E), all the patrons are automatically linked to each other. For example, Bob Smith is linked to Mary and Billy Smith. Then later Sally Smith is linked to Bob, Sally will also be linked to Mary and Billy. All four are linked together.

1. In **Check Out (Circulation Desk)** display the patron record and click the **Linked Patrons** tab.
2. Click the **Link** button and search for the Patron record to link to the original patron record.



3. A list of possible choices appears. Highlight the Patron record to be linked to the original record and click the **Select** button. Repeat the process to link multiple patrons to one patron.



If you search by the full name, the software presents likely matches and automatically links the two patrons.

Moving Between Linked Patrons

Once linked, if any of the patrons within the linked group has a hold, fine, or overdue, the joint **Linked Patron** tab displays in red.

1. At a patron record, go to the **Linked Patrons** tab
2. Select the desired linked patron by highlighting the appropriate line. Click the **Go To Patron** button to retrieve a linked patron record. You are now at the patron record for the linked record. You can check out, pay fines, and all other functions associated with the patron record.

Unlinking Patrons

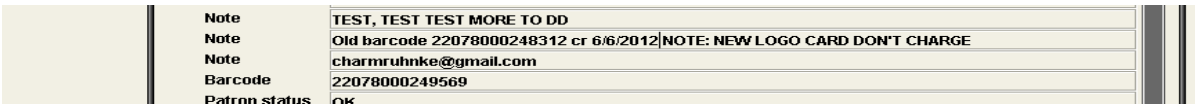
Note: if two patrons are unlinked, it unlinks all the patrons who were linked. For example, if Bob Smith is linked to Sally Smith, Mary Smith and Billy Smith. And Bob is unlinked from Sally, Mary and Billy are also unlinked from Sally.

1. At a patron record, go to the **Linked Patrons** tab
2. Select the patron to unlink
3. Then click the **Unlink** button to remove the link.

Assigning New Barcodes

If a new barcode needs to be assigned to a patron, the old barcode number is moved to a Note field with the comment “this is an old barcode”, staff initials, library name and date.

1. Retrieve the patron’s record in **Check Out (Circulation Desk)**
2. Click the **Edit Patron Record** icon
3. Copy the patron’s current (soon to be former) barcode from the Barcode Field
4. Click the **Insert Field** icon
5. Scroll through the field choices, selecting **Note**
6. Paste the barcode into the new **Note field**, adding the comment Previous Barcode, include your initials, library name and the date



7. Next move the mouse cursor to the **Barcode Field**, remove the old barcode from the field and scan the new Barcode into the **Barcode Field**.
8. Click the **Save** icon.

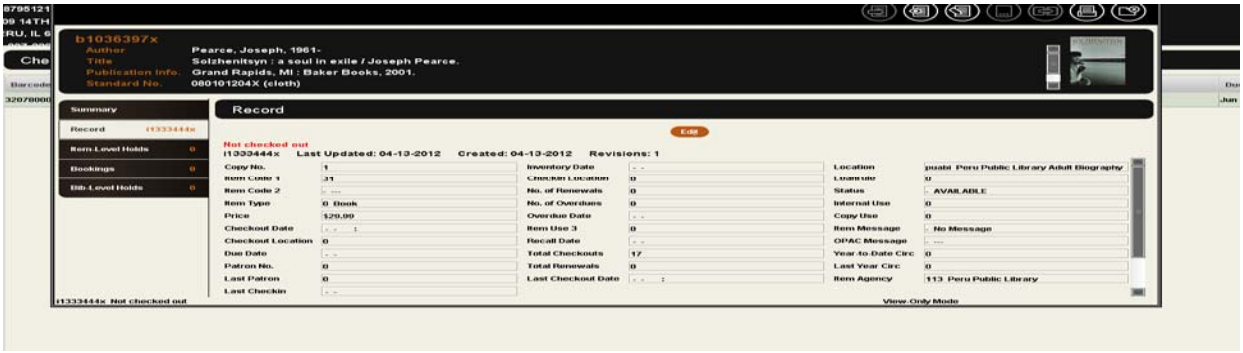
Item Messages

Periodically circulation staff may need to add a message to the item's record.

Adding Item Message at Check-out

1. Check out the item to the patron.

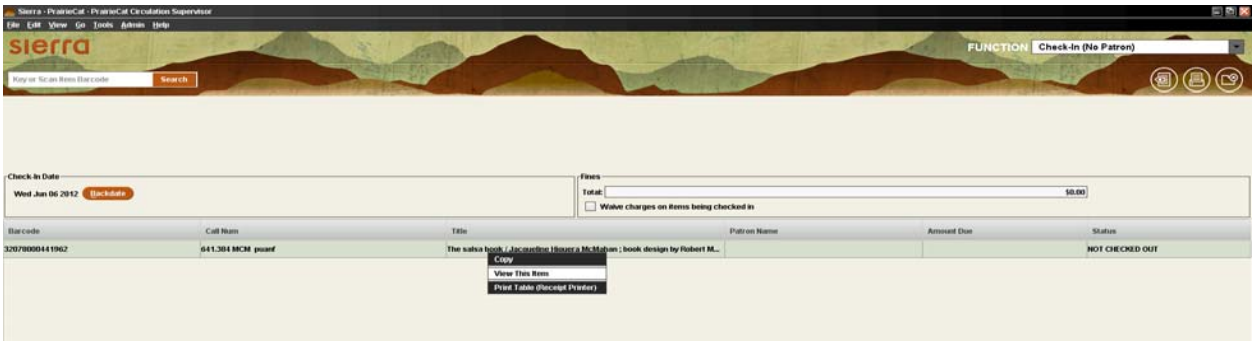
2. Right click on the item, click **View this Item**
3. The item's record displays, click on the **Edit button** (not the icon, but the



   button)
4. Now click the **Insert Field** icon
5. Choose **Message** from the **Insert Field** drop down box.
6. Add the message, remember to include your initials, library name and date with the message.
7. Click the **Save** icon
8. Continue checking out to the patron. The message will appear/display the next time the item's barcode is scanned.

Removing Item Message

1. In Check-in (No Patron), scan the item's barcode.
2. Right click on the item, click **View this Item**



3. The item's record displays, click on the **Edit button** (not the icon, but the button)

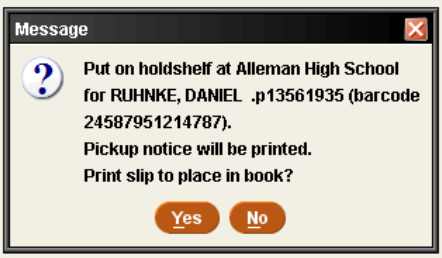
4. Scroll down to the **Message** field; click the mouse cursor on the Message.
5. Right click, choose Delete Field

6. Click the **Save** icon

Note: Item messages must be manually deleted.

Paging (Pick List)

1. Select **Check-in (No Patron**) from the Function drop down box
2. Scan the item's barcode
3. If the item is for a patron at your library, a message displays with instructions to put the item on the hold shelf.
   If the item is for a patron at another library, a message display with instructions to put the item in transit for delivery to the other library.

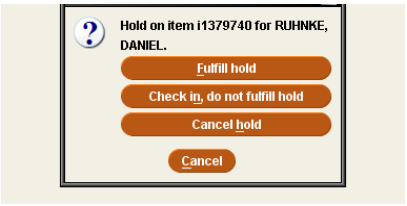


4. Repeat steps 2-4 until all the items pulled for the Paging list have been handled.

Holds

Check-in without triggering hold

When checking in an item with a hold, the pop-up screen displays four options: **Fulfill Hold**; **Check in, do not fulfill hold**; **Cancel hold**; and **Cancel**.



- Usually, the **Fulfill** hold option is chosen.
- But if the item cannot be used to fill the hold because of damage, choose **Check in, do not fulfill**. This moves the hold to the next available item. Once the damaged item is repaired, check it in using Check-in (No Patron) to put the item back in circulation for holds, etc.
- Choosing **Cancel hold** terminates the hold. DO NOT CHOOSE **Cancel hold**
- **Cancel** ends the transaction, the item is not checked in and the hold remains outstanding.

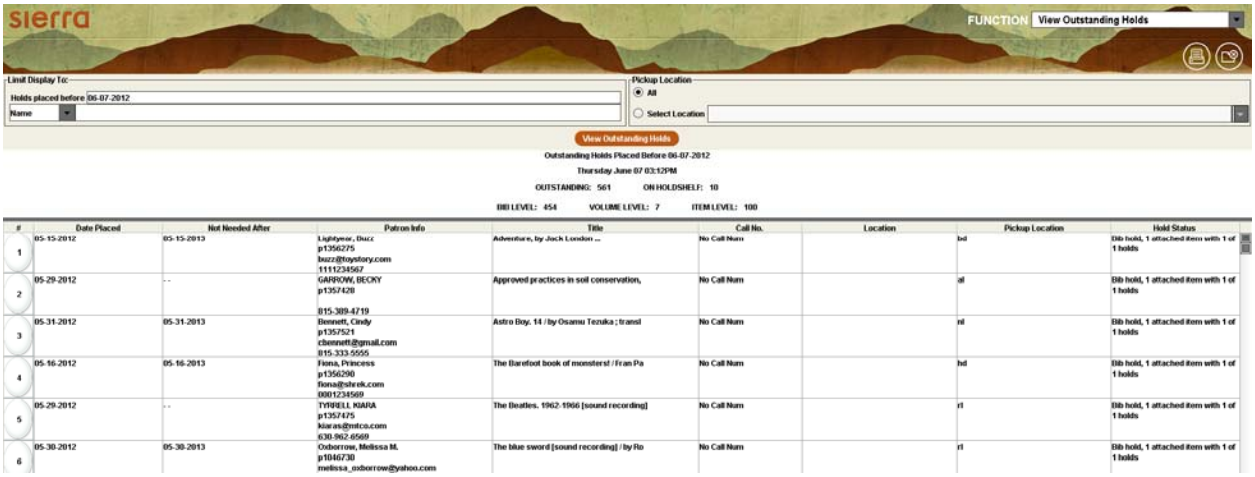
Note: Staff should not choose* Check in, do not fulfill hold *unless the item needs to be processed, mended or other technical services. The option is not to be used because the current patron wants to renew the item or because staff does not want to send the item to another library.

Viewing Outstanding Holds – Advanced Login Permissions

Use **view outstanding holds** on a weekly basis to find holds for bibliographic or volume records that no longer have any holdable items, for items that are billed or claimed returned, and for high-demand items whose holds are not filled in a timely manner.

To see the outstanding holds by all the library's patrons,

1. Go to the Function box, selecting **View Outstanding Holds** from the Function box
2. The software displays **Limit Display To** and **Pickup Location** choices
3. Modify the **Holds placed before** date to view holds placed before a different date. Today's date displays by default.
4. For **Pickup Location**, choose the location(s) for viewing outstanding holds
5. Choose **View Outstanding Holds** to generate the Outstanding Holds Report.



This report can be sorted by the entries in the table. By default, the report sorts by hold status, then by title. To sort the table manually, click the top of each column.

View more information about a specific hold, right-click the entry in the table. The system displays an options menu.

Print the report by choosing the Print icon, or selecting the Print Report from the right-click menu. Once you have printed the report, you can cancel or transfer holds for items that are no longer holdable.

Clearing the Hold shelf

. Once the applicable items are pulled from the hold shelf, they should be checked in to activate the next hold or send the item back home or return the item to the library shelves.

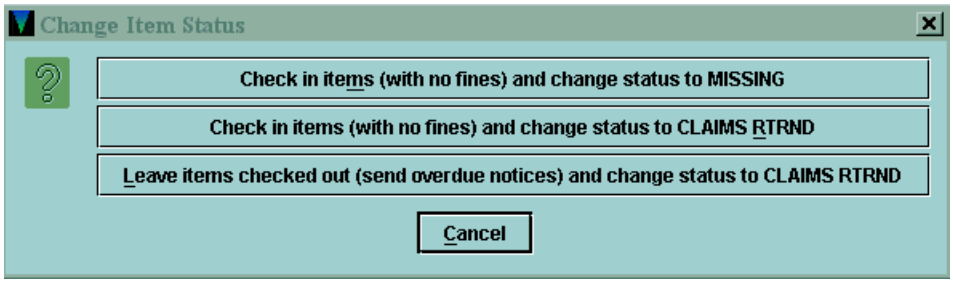
1. Select **Check In (No Patron)** from the Function box
2. Scan the item's barcode
3. Follow the screen directions displayed by the software
4. Repeat steps 2-4 until all the items removed from the hold shelf have been handled.

Claim Items Returned – local decision

If a patron claims to have returned an item but the item has not yet been checked in, it is possible to mark the item as *"claim returned"*. It is a local decision whether to make an item claims returned and who at the library may make the change.

8. Retrieve the Patron record and click on the **Checked Out Items** tab

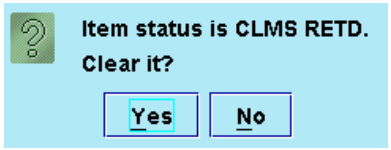
9. Select the appropriate item(s) from the list of items checked out and click the **Claim Returned** button
10. When the calendar screen appears, select the date the patron claims to have returned the item by clicking in the appropriate day. If the patron does not indicate a specific date, click the **Blank Date** button.
11. Choose from the displayed options. All three options place the item into the ONSEARCH FILE (a missing items report) and a note is added to the Patron and Item records indicating that the item has been claimed returned by the patron. It is not possible to automatically select or display only one of the three choices presented when the **Claim Returned** button is selected**.** An appropriate choice must be made in order to continue with the claims returned process.



- Choice 1 – item is declared MISSING and removed from the Patron record, no fines are assessed. The patron is no longer responsible for the item.
- Choice 2 – item is declared CLAIMS RTRND and is removed from the Patron record, no fines are assessed. The patron is no longer responsible for the item.
- Choice 3 – the system leaves the Item record checked out to the patron and the system will continue to send overdue notices, generate a bill, accrue fines, etc., and the status of the item changes to CLAIMS RTRND. **The patron remains responsible for the item**.

Clearing Claims Returned

If an item with a claims returned status is checked in (or out), using any normal check-in or check-out function the system prompts the staff member:

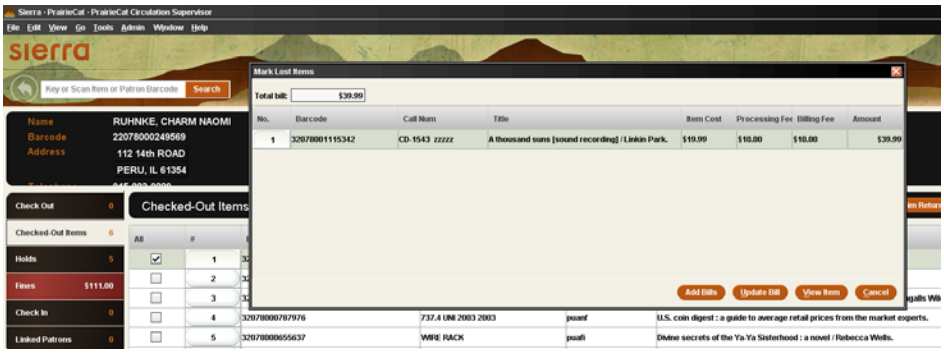


It is a local decision which staff members are authorized to check in a claims returned item. If the selection is "No", the item remains checked out to the patron. The only way to clear the item status of claims returned is to answer "**Yes**" to the prompt.

Marking Items Lost

To indicate that one or more items have been reported lost by a patron:

1. Retrieve the patron's record and click the **Checked Out Items** tab.
2. Select the item by clicking in the appropriate line and clicking the **Mark Lost Items** button.
3. The **Mark Lost Items** pop-up window displays.



4. Clicking the **Update Bill** button allows staff to adjust sections of the bill. Always click **Update Bill** if ANY changes are made to the bill, then click **Add Bills**
5. Clicking the **Add Bills** button adds the bill to the patron's account.

NOTE: You must **Update Bill** if there are any changes or adjustments before clicking the **Add Bills** button.

- Appropriate charges and fees are added to the Patron record.
- The status fixed-field of the lost item is changed to n: BILLED, not yet paid when a bill is calculated by the system.
- A note is added to the Item record by the system indicating that the item is billed.
- The **Fines** tab is used to collect money for the lost item.

Fines – Reinstating Fine

If a fine is mistakenly paid or waived, the fine can be reinstated. You can reinstate all types of fines except:

- **Any Manual charge added as a fine**
- Adjustment charges for billed rental items
- Any library notice printing charges
- Any charge with a payment status of Adjustment

To reinstate a fine:

1. View the fine you want to reinstate from Fines Paid, either from the patron's list of **paid fines** or within the **Fines Paid** function.

2. Choose a fine to view within the **Fines Paid** function
3. Choose the **Reinstate Fine** button.
4. The **Reinstate Fine** dialog box prompts you: This fine will be reinstated. Original fine payment information will be removed.
5. Choose the **Confirm** button.

Count Use – Local Decision

The Count Use functions enable the collection of in-house usage statistics for library materials that do not circulate. For example, collecting use statistics on items found unshelved among the stacks, items left by a copy machine, or non-circulating items that are part of a special collection.

Sierra enables you to count usage in categories: internal use, copy use, item use 3 and portable reader. If the library uses a portable, handheld barcode reader, that data can be uploaded by using Count Use – Portable Reader.

1. In the Functions box, choose the applicable Count Use option.
2. Scan the item(s) barcode
3. Reshelve the item(s)
4. The number of **Count Use** transactions now displays in the item(s) record. The Count Use transaction numbers are not included in the regular checkout statistics, but appear in the Internal Use statistics box.