

REPORTS & OTHER SHINY THINGS

Mike McClellan Senior Library Consultant

Agenda

- New Features with Sierra 2.0
- Reports
- Circulation Features

Sticky Status

- Use case: reference status “o” item gets a temporary status change like mending, damaged, binding etc.
- Problem: checking in the item resets the status back to “-” as Sierra forgets it was reference (o) to begin with.
- Solution: a new fixed field called Sticky Status. (can be renamed but is a consortia decision)
- Stores the original “o” value.

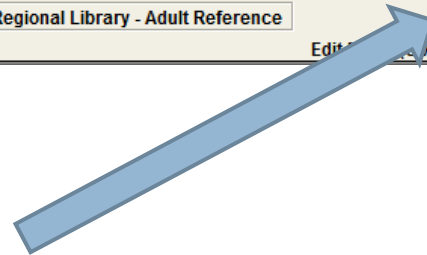
Sticky Status

Not checked out and Lib Use Only

i1036626x Last Updated: 02-01-2015 Created: 02-01-2015 Revisions: 1

Copy No.	1	Inventory Date	- -	Loanrule	0
Item Code 1	0	Checkin Location	0	Status	o Lib Use Only
Item Code 2	I NONFICTION	No. of Renewals	0	Internal Use	0
Item Type	6 REF-BOOK	No. of Overdues	0	Copy Use	0
Price	\$0.00	Overdue Date	- -	Item Message	- No Message
Checkout Date	- - :	Item Use 3	0	OPAC Message	- ---
Checkout Location	0	Recall Date	- -	Year-to-Date Circ	0
Due Date	- -	Total Checkouts	0	Last Year Circ	0
Patron No.	0	Total Renewals	0	Item Agency	11 TLR
Last Patron	0	Last Checkout Date	- - :	Sticky Status	o Lib Use Only
Last Checkin	- -	Location	Irare Waseca - Le Sueur Regional Library - Adult Reference		

lib Use Only Edit (R)



Sticky Status

□ How to implement:

1. Create list of all reference items
2. Use rapid update/global update to set sticky status to “o”
3. Update item creation templates to either set or prompt to set “o” sticky status for new reference items

Damaged Items

- Use Case: give us a *Lost Books* like workflow for Damaged material so we can change status and possibly add a charge without editing the item
- Requires: a “damaged” item status code which is “g” at Marmot.
- New option under Checked out books in Circulation Desk mode
- Can assess a manual charge or just change the status
- Copies the 245 title field and barcode into the manual charge description which you can edit
- Note: unlike “lost books” this doesn’t checkin the item. Workflow is to follow damaged steps and then checkin item. Answering “No” to the “do you want to update status to “-” prompt.

Mark Damaged Items



Checked-Out Items Print slip [Renew](#) [Claim Returned](#) [Mark Lost Items](#) [Mark Damaged Items](#) [Change Due Date](#) All


All	#	Barcode	Call Num	Location	Title	Due Date	Status
<input type="checkbox"/>	1	30600000051145		ztzi	Mike ILL test	03-13-2015	OVERDUE
<input type="checkbox"/>	2	30600000051152		ztzi	Mike ILL test	03-06-2015	OVERDUE
<input checked="" type="checkbox"/>	3	30604002128976	FICTION McClell	bnaf	Magic carpet ride : a Scottish island novel / by Audrey ...	03-12-2015	OVERDUE

Mark Damaged Items

Mark Damaged Items ✕

Total Amount Charged:

No.	Barcode	Call Num	Title	Status	Amount
1	30604002128976	FICTION McClell bnaf	Magic carpet ride : a Scottish island novel / by Audre...	Available	




- (1) Mark Damage – not patron's fault so no charge and item status is now damaged
- (2) Mark Damaged and Add Charge to create manual charge and status change

Marked Damaged

Checked-Out Items Print slip [Renew](#) [Claim Returned](#) [Mark Lost Items](#) [Mark Damaged Items](#) [Change Due Date](#) All

All	#	Barcode	Call Num	Location	Title	Due Date	Status
<input type="checkbox"/>	1	30600000051145		ztzi	Mike ILL test	03-13-2015	OVERDUE
<input checked="" type="checkbox"/>	2	30600000051152		ztzi	Mike ILL test	03-06-2015	OVERDUE
<input type="checkbox"/>	3	30604002128976	FICTION McClell	bnaf	Magic carpet ride : a Scottish island novel / by Audrey ...	03-12-2015	Damaged



Still checked out but marked with your damaged item Status

Next: Check in to clear from patron's record but don't change the Status

Possible problem with items that don't belong to your library going into "t" Transit instead of retaining Damaged status.

Mark Damaged and Charge

The screenshot shows a library system interface with an 'Add Charge' dialog box. The dialog box is titled 'Add Charge' and has a close button (X) in the top right corner. It is divided into two main sections: 'Predefined' and 'Details'.
The 'Predefined' section contains a dropdown menu labeled 'Predefined:' with a downward arrow.
The 'Details' section contains three fields:
- 'Amount:' with a text box containing '\$17.95'.
- 'Reason:' with a text box containing 'Damaged 30604002128976 Magic carpet ride : a Scottish island novel / by Audrey McClellan.'
- 'Location:' with a dropdown menu showing 'bnaf'.
At the bottom of the dialog box are two buttons: 'OK' and 'Cancel'.
Below the dialog box, there are two buttons: 'Mark Damaged' and 'Mark Damaged And Add Charge'.
In the background, a table is partially visible with columns for 'Charged' (showing '\$0.00') and 'Status' (showing 'available').

- Manual Charge
- Can change amount from default replacement from item record to a partial charge
- Can use a predefined charge instead
- If no default price in item record then Amount will be \$0.00 and needs to be updated (doesn't use loan rule default price)
- Can edit the "Reason"
- Location is item location code

Expired Card Warning

Options For mcm Login

ArticleReach Departments Due Slip Edit Holds Data Exchange
Login Patron Display Printing Setup Sounds Tabs Web Master

Brief display
 Brief display w/address
 Custom display
 Show patron photo

Custom Display Settings

Displayed Fields	Available Fields
Name	Address 2
Barcode	Alternate ID
Address	Birth Date
Email	Care Of
Expiration Date	Claims Returned
Note	Current Checkouts
Telephone	Current Item A
Patron Type	Current Item B
	Current Item C
	Current Item D
	Home Library

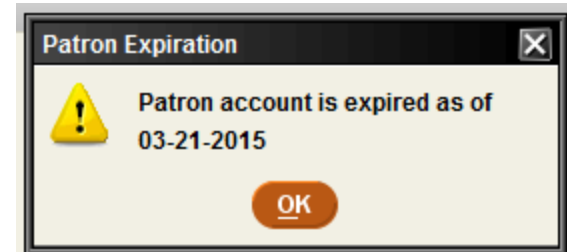
Expiration Date Alerts

Days before expiration: ←

Display expiration pop-up

OK Cancel

- Set in Options : Patron Display
- Admin App or Admin Options within Sierra SDA
- Also appears for already expired accounts



Use Case: warn us when a patron record is going to expire soon

Running Count of Checkins

	Patron Name	Amount Due
	McClellan, Mike	
	McClellan, Pebbles	

Items scanned : 2



Checkin (no patron) - not currently in Check in (Circulation Desk)

Easier to verify RFID pad checkins

Print Templates: Due Date Slips

Mike McClellan Settings

Window Help

Multiselection Groups Web Options Web Master Headings Reports
 Session Statistics Create Lists Claiming/Binding Statistics Windows Funds
 Global Update Display Record Templates On-the-fly Records
 New Records Rapid Update Receive Invoice Import Invoice Recommendations
 Macros Export Records Search Print Templates

Output Type: Due Slip Use Print Templates

Other Templates
 _DueSlip Default DueSlip
 _DueSlip_40_Col Default 40 Columns

Viewing _DueSlip_40_Col

Date Due Receipt
 03/27/2015
 Items checked out to
TITLE
BARCODE
DUE

glendale
 Library, Arts & Culture

Date Due Receipt
 03/27/2015
 Items checked out to
 Pebbles McClellan

TITLE Mike ILL test
BARCODE 30600000051145
DUE 04-20-15 00:00AM

TITLE Mike ILL test
BARCODE 30600000051152
DUE 04-13-15 00:00AM

Would require “graphics capable” receipt printer

Date Due Receipt

new java.util.Date()

Items checked out to
 \$F{Patron_Name_C}

TITLE	\$F{Item_Title}
BARCODE	\$F{Item_Barcode}
DUE	\$F{Item_Due_Date}

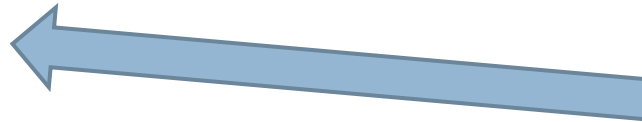
Print Templates: Receipts

The image shows a software interface with two main windows. The left window, titled 'Viewing _EcomReceipt_40_Col', displays a 'Payment Receipt' form. The form includes a 'Billing Information' section with the date '04/08/2015' and an 'Invoice' section with fields for 'Description', 'Amount Owed', 'Amount Paid', and 'Balance'. The right window, titled 'Settings', is open to the 'Print Templates' tab. It features a menu bar with options like 'Multiselection Groups', 'Web Options', 'Web Master', 'Headings Reports', 'Session Statistics', 'Create Lists', 'Claiming/Binding', 'Statistics', 'Windows', 'Funds', 'Global Update', 'Display', 'Record Templates', 'On-the-fly Records', 'New Records', 'Rapid Update', 'Receive', 'Invoice', 'Import Invoice', 'Recommendations', 'Macros', 'Export Records', 'Search', and 'Print Templates'. The 'Print Templates' section includes an 'Output Type' dropdown set to 'Payment Receipt', a checked 'Use Print Templates' checkbox, and two columns of templates: 'Preferred Templates' (empty) and 'Other Templates' (containing '_EcomReceipt Default Ecommerce' and '_EcomReceipt_40_Col Default 40 Colu'). Navigation buttons 'Rename', 'Edit', 'Preview', 'Import', and 'Export' are located at the bottom of the settings window.

Total fines on Charges Printout

- Fines tab
- Select fines (outstanding charges)
- Click on print icon or right click and print table
- No formatting options such as replacing “fines”

Status	Title	Location	Amount
Remaining	Lost Watership Down.	yapfi	\$9.00
	Lost Watership Down.	yapfi	\$10.50
	Lost Cat / R.L. Stine. bypse		\$23.99
	Lost Cat [videorecording] / a co-production of BBC	fjvnf	\$29.95
	Wildvision, BBC Lionheart Television		
Total outstanding fines:			\$73.44



New Payment Note when Adjusting Charges

Paid Fine Detail

Payments Made By McClellan, Mike

Detail	Balance
Invoice: 42056	Item Charge: \$0.65
Charge Type: Overdue	Processing Fee: \$0.00
Call Number: jaFICTION McClell	Billing Fee: \$0.00
Author: McClellan, Audrey (Audrey Phillips)	
Barcode: 30604002128976	Total: \$0.65
Description: Magic carpet ride : a Scottish island novel / by Audrey McClellan.	Previous Paid: -\$0.00
Charge Location: bnaf	Amount Paid: -\$0.00
Statistics Group: 0	Amount Due: \$0.65
Checkout Date: 02-19-2015	
Due Date: 03-12-2015	
Assessed Date: 03-27-2015	
Date Paid: 03-27-2015	
Payment Status: Adjustment	
Payment Type:	
Payment Note: adjusted due to snow day	
Login: mcm	

Fines tab

Highlight fine

Right click

Must adjust fine for Payment note to become active



No more Auto Fill Birthday “19”

New Patron Last Updated: 03-27-2015 Created: 03-27-2015 Revisions:

Expiration Date	03-27-2015	Birth Date	- -
Patron Code 1	- not coded	Home Library	bc Comfrey Area L
Patron Code 2	- ---	Patron Message	- No Message
Municipality/Townsh			- ---
Patron Type			
Total Checkouts			\$0.00
Total Renewals			
Current Checkouts		Current item B	

➤ Name

➤ Address

➤ Telephone

Edit Data [X]

Birth Date 07-14-1

Next **Cancel New Record Creation**

Reports

- Clear the Holdshelf
- View Outstanding Holds
- High Demand Holds
- Purchase Alerts
- Fines Paid

Clear the Holdshelf

☐ Checks the virtual holdshelf for holds that:

☐ Never picked up

Not checked out and ON HOLDSHELF since 01-17-2015 04:11PM until 01-26-2015
i74470991 Last Updated: 01-17-2015 Created: 11-29-2012 Revisions: 25

I, KIMMY g...	Red kayak / Priscilla Cummings.	YF CUM bayf	1440002430761	CHECK IN
RA ALICIA	Caribbean style / by Suzanne Slesin ... [et al.]; photographs by Gilles de Chabaneix.	747.2 SLE(Staff Retrieval) srnfa	3482600009493	PICKUP TIME EXPI...

☐ Library never filled

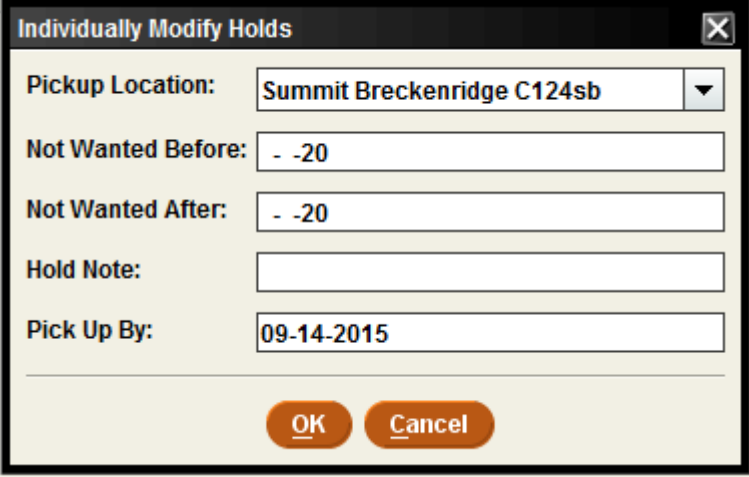
	Title	Call Num	Barcode	Status
JOHN H	Get behind me Satan [sound recording (CD)] / White Stripes.	No Call Num		HOLD EXPIRED
NANCY N	The new seed-starters handbook / by Nancy Bubel ; illustrations by Frank Fretz ; photographs by Aliso...	635.94 Bub gugnfn	1270000472340	HOLD EXPIRED

Clear the Holdshelf

- Important to run on a regular basis to keep the virtual holdshelf and actual holdshelf in sync
- And for batch deletes old holds must die
- Report can be Viewed first to see what will happen if Cleared
- But has to be Cleared eventually
- Will indicate what needs to happen
 - ▣ Checkin
 - ▣ Reshelve

Changing Hold Pickup By

- ❑ Patron asks for extension
- ❑ Must be changed before Clear Holdshelf is run
- ❑ Modify hold through the patron record
 - ❑ Can't be done within the report



Individually Modify Holds

Pickup Location: Summit Breckenridge C124sb

Not Wanted Before: - -20

Not Wanted After: - -20

Hold Note:

Pick Up By: 09-14-2015

OK Cancel



View Outstanding Holds

Print Close

Limit Display To:

Holds placed before

PATRN NA...

Pickup Location

Telluride Community Library

All

Select Location

[View Outstanding Holds](#)

Outstanding Holds Placed Before 09-08-2015

Tuesday September 08 11:34AM

OUTSTANDING: 625 ON HOLDSHELF: 121

BIB LEVEL: 320 ITEM LEVEL: 305

#	Date Placed	Not Needed After	Patron Info	TITLE	CALL #	LOCATION	Pickup Location	Hold Status
1	02-03-2015	08-04-2015	INGRAM CHARLIE p1532591 cmi5840@gmail.com 843 810-3409 CEL	Alaska :	No Call Num		tlw	Bib hold, 1 attached item with 1 of 1 holds
2	04-23-2015	10-23-2015	KINGSFORD, BRIAN JOCELYN bode tyler sasha luca p1610321 kingsford.brian@yahoo.com	Almost acoustic [sound recording] : reco	No Call Num		tlw	Bib hold, 1 attached item with 1 of 1 holds
3	04-06-2015	10-06-2015	ROSS CARRIE & GERRY p1249740 CR@TELLURIDEARCHITECT.COM	Bending sticks : the sculpture of Patric	No Call Num		tlw	Bib hold, 1 attached item with 1 of 1 holds

Not in Real Time – holds as of previous day

Shows holds based on Pickup Location – what “your patrons” are requesting

Use the sorts above the column headers such as Date Placed to identify pages that were never filled.

Use the toggles such as Hold Status/Item Status and Call Number/Barcode

Can print to email printer to copy into Excel

View Example

BIB LEVEL: 320 ITEM LEVEL: 305

#	Date Placed ▲	Not Needed After ☞	Patron Info	TITLE	CALL # ☞	LOCATION	Pickup Location	STATUS ☞
1	09-11-2013	--	OSSOLA JAMES J p1254952 jj@montrose.net 728-5298	Hastings Mesa : at the foot of Mount Hay	No Call Num		tiw	
2	09-25-2013	--	REMEC SUSANNA tomaz gregor luka p1248808 SUZHUZ@YAHOO.COM	Four agreements [sound recording]	No Call Num		tiw	
3	10-03-2013	--	ANDREW ROWENA; carter, gemma, hollis p1255421 rowenasworld@gmail.com	The power of six : book two of the Lorie	No Call Num		tiw	
4	11-22-2013	05-24-2014	ABBOTT ANNICA M p1252219 annica9@hotmail.com 708-0722	Building emotional intelligence : techni	BF576 .L37 2008	as	tiw	ON SHELF
5	02-04-2014	--	FUCIGNA ISABEL H p1323204	Consumer reports.	ZINE 2014,MARCH	tiwm	tiw	ON SHELF

Sorted by Date Placed to see oldest holds

Toggle to Item Status

Holds #1, 2, 3 are bib level holds. Right click to see option to view bib record

Hold # 4 is an item hold that was never pulled and should have expired based on Not Needed After date but that requires running clear the holdshelf

Hold # 5 is an outstanding item hold

View Example – bib detail

b10609015
AUTHOR Berry, Glenn, 1901-
TITLE Hastings Mesa : at the foot of Mount Hayden / by Glenn Berry.
PUBLISHER [Grand Junction, CO] ; [the author], c1984.

Summary

Record **i11527778**

View **h Holds/Bookings** **Book Any Available Item** **Book Selected Item(s)** All

#	Recnum	Call Num	Barcode	Location	Due Date	Holds	Bookings
1	i11527778	WH 978.8 Ber	1270000175439	gugwh	ON SHELF	0	0
2	i1081114x	978.823 B534h	1090002229787	mpmlk	LIB USE ONLY	0	0
3	i13344328	F782.S23 B4 1984	1080005731612	msdsc	LIB USE ONLY	0	0

Item-Level Holds **0**
Bookings **0**
Bib-Level Hold **1**

Hold #1 a bib level hold

Item 1 was presumably paged and not trapped

Items 2-3 are reference only

Based on age of this hold, probably should be canceled. Can't be done through report. Use a separate Sierra or note the details to cancel later.

Or the library could be contacted to checkin the circulating item to trap the hold

High Demand Holds

- Evolution of Purchase alerts which failed to include bibs with holds but no items (on order)
- Must be set up with a “threshold”
- Based on pickup location
 - ▣ Your patrons
 - ▣ No option to combine libraries in a multi branch
- Not real time | reflects as of yesterday
- Decision Center incorporates options to report on waiting time or desired ratio

High Demand – Selected Example

View Report For:

System-Wide Thresholds

Selected Pickup Location

Wilkinson Public Library C528

Create Report

#	Title	Author	Material Type	System Holds	System Items	Local Holds	Local Items
1	The Age of Adaline [videorecording].		VISUAL MEDIA	57	1	3	0
2	Birdman [videorecording] : or (the unexpected virtue of ignorance) / Fox Searchlight Pictures and Regenera		VISUAL MEDIA	14	5	3	0
3	Electronic keyboard [realia] : Casio Privia PX-130.		REALIA	8	2	8	2
4	The girl in the spider's web / David Lagercrantz ; translated from the Swedish by George Goulding.	Lagercrantz, David...	BOOK/SERIAL	111	32	3	1
5	Inside Out [videorecording].		VISUAL MEDIA	54	0	3	0
6	The marriage of opposites : a novel based on the life of Rachel Pizarro / Alice Hoffman.	Hoffman, Alice., au...	BOOK/SERIAL	58	34	3	1
7	Paul Blart, mall cop 2 / Columbia Pictures presents ; in association with LStar Capital ; a Happy Madis...		VISUAL MEDIA	81	19	3	1
8	Purity / Jonathan Franzen.	Franzen, Jonathan...	BOOK/SERIAL	39	29	4	1

With preference to “local holds” set, important to note number of local items to local holds. For example #2.

Entry # 5 is an on order record. No system or local items.

High Demand Holds

- The girl on the train has over 100 holds. Why doesn't it show up in this report?
- Reporting threshold for the System Report is set to 20 which produced 43 titles.
 - ▣ There are 108 holds and 128 copies on TGOTT so less than a 20 ratio – more like 1 to 1
 - ▣ Setting reporting threshold to 1.
 - The girl on the train shows up along with 6,300 additional titles.

Purchase Alerts

- Original method of alerting you to titles with a ratio of holds to items
 - ▣ Did not factor in on order bibs with no items
- Effectively disabled at Marmot
 - ▣ 042 > Holds: Number of holds before purchase alert.....255
- Create Lists – Copy Purchase Alerts system file into a empty review file.
 - ▣ Does not update as conditions change

Fines Paid

- Is complied in real time
- Reconcile cash drawer to Sierra activity
- On screen report can not be customized
- Export to Excel (example to come)
- Do Not Clear the data

Fines Paid Example

Clear D... View De... Export Print Close

Limit Display By

Date Paid Between and

Statistics Group

Login

Owning Location

Telluride Community Library

All

Select Location

[View Fines Paid](#)

Receipts for 09-08-2015 to 09-08-2015

Overdue Paid	\$11.90	Total Paid	\$11.90
Replacement Paid	\$0.00	Total Waived	\$14.98
Manual Paid	\$0.00		

#	Owning	Date Paid	Invoice	Statistics Group	Login	Charge Type	Description	Patron
1	thwmc	09-08-2015	483777	901	tlwcirc	Overdue	The quest [sound recording] / ...	p1725850
2	thwmc	09-08-2015	53367	901	tlwcirc	Overdue	Crazy rich Asians [sound recor...	p1725850
3	thwmc	09-08-2015	53368	901	tlwcirc	Overdue	What is the what [sound recor...	p1725850
4	thwjp	09-08-2015	58017	901		Replacement	One pup's up / story by Marsha...	p1551881
5	thwnf	09-08-2015	76669	901		Replacement	The skinnytaste cookbook : lig...	p1634754
6	tlw	09-08-2015	87284	901	tlwcirc	Adjustment	Telluride Townie Bike [realia] : ...	p1723666
7	thwmc	09-08-2015	87806	901	tlwcirc	Overdue	Swimsuit [sound recording] / b...	p1385074
8	thwjf	09-08-2015	87902	901	tlwcirc	Lost Book	The gray-eyed goddess / by Ma...	p1838476
9	thwjf	09-08-2015	87903	901	tlwcirc	Lost Book	The final battle / by Mary Pope ...	p1838476
10	thwmc	09-08-2015	92823	901	tlwcirc	Overdue	A God in ruins : a novel / by Kat...	p1385074

Who owns the material - owning location - reconcile material charges taken at other library

Where charges were resolved – login or statistical group to balance cash drawer or see who is waiving charges (could also query circ overrides in Sierra Admin)

Export to Excel for additional data fields

Export to Excel

Date Assessed	Patron Na	Patron Re	Patron Un	Invoice	Charge Amt.	Processing	Billing Fee	Charge Type	Owning Locatio	Date Paid	Statistics Grou	Last Paym	Login
5/19/2009	Spinelli, D	1639885	CO DL#941	488544	\$4.50	\$0.00	\$0.00	Overdue	vlnf	9/8/2015	911	\$0.00	vlcirc
5/19/2009	Spinelli, D	1639885	CO DL#941	488545	\$4.50	\$0.00	\$0.00	Overdue	vlnf	9/8/2015	911	\$0.00	vlcirc
5/19/2009	Spinelli, D	1639885	CO DL#941	488546	\$4.50	\$0.00	\$0.00	Overdue	vlnf	9/8/2015	911	\$0.00	vlcirc

Creation Mo	Description	Amount P	Payment Status	Payment Type	Payment Note
Automatic	The rise of the cre	\$4.50	Full Payment	null	
Automatic	Who's your city? :	\$4.50	Full Payment	null	
Automatic	The flight of the c	\$4.50	Full Payment	null	

Notice the “null” under Payment Type and empty Payment Note Cells

Fines Payment Type

- Payment Type feature has not been enabled.
 - ▣ Records consortia assigned codes detailing method of payment
 - Cash | Credit | Check | Work Release | Barter
 - ▣ Recommend creating consortia codes for types of Waive transactions
 - Waive (good will) | Waived (system or staff error) | Waive (food for fines)
 - ▣ 14 total codes
 - ▣ Optional free text staff note
 - ▣ Adds an additional step to clearing charges

Payment Type

rowse

Name **McClellan, Mike**
Barcode **4929**
Address **4929 Woodlawn Blvd Minnea**
Return Code **NONE**

Check Out **0**

Checked-Out Items **2**

Holds **2**

Fines **\$133.34**

Check In **0**

Fines

All	Status
<input checked="" type="checkbox"/>	Remaining Manual Lost library card
<input type="checkbox"/>	Overdue Blue gold : a novel from the Numa files / Clive Cussler, w

Collect M

Payment Data

Payment Type:
C Check

Payment Note:

OK

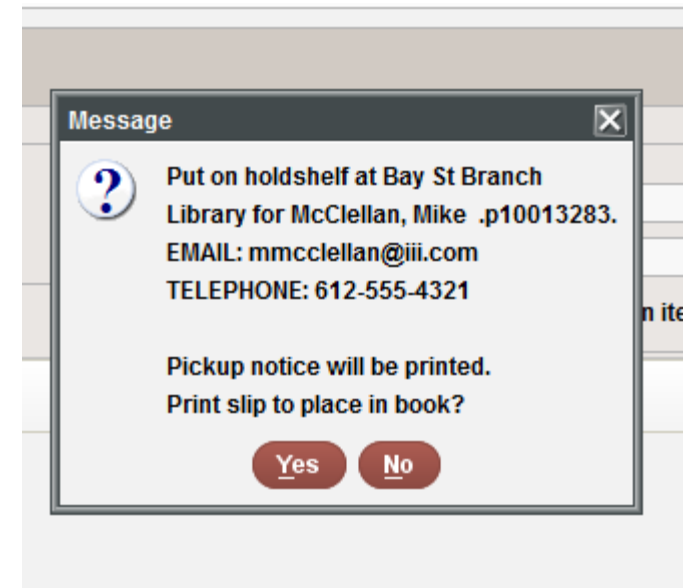
Tip: make the first code be the most commonly used type of payment
Payment Note is optional

Fines Paid with Payment Type

Creation Mode	Description	Amount Paid	Payment Status	Payment Type	Payment Note
Automatic	If I stay / Metro-Goldwyn-Mayer Pictures and New Line Cinema present a Di Novi Pic		\$1.00 Full Payment	C	
Manual	OVERDUE 30611000749745 The nurse's secret suitor / Cheryl Wyatt.		\$0.00 Waive	W	illness
Manual	OVERDUE 30611000705689 A place to call home / Kathryn Springer.		\$0.00 Waive	W	wrong loan rule
Manual	OVERDUE 30611000740009 Making his way home / Kathryn Springer.		\$0.00 Waive	W	knows director
Manual	OVERDUE 30611000705721 A family for Faith / Missy Tippens.		\$0.00 Waive	W	
Manual	OVERDUE 2013-07-11 30618001271835 Taking Chance [videorecording] / HBO Films presents a Civil Dawn P		\$0.00 Waive	W	

Add Contact Info to Screen

- Current Marmot setting is print contact info on hold slip.
- Could be added to screen display
- For libraries that call patrons
- See email? Hold Notice
- Don't see email then call
- No email. No phone?
 - ▣ Carrier Pigeon?

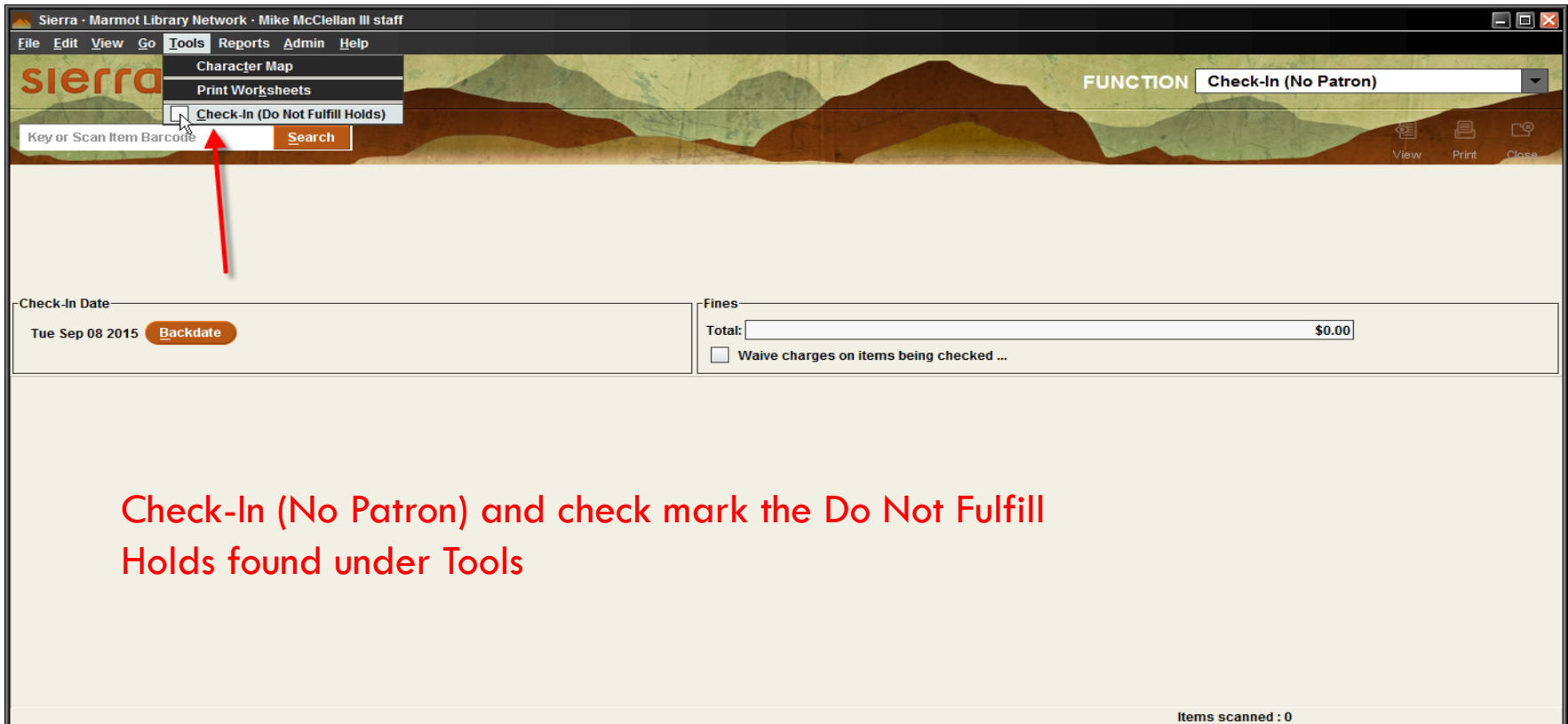


Circulation Features

- Check in (no patron) do not fulfill hold
- Count Use
- Floating
- Rapid Update Due Date
- Globally Purging Fines

Checking in without trapping hold

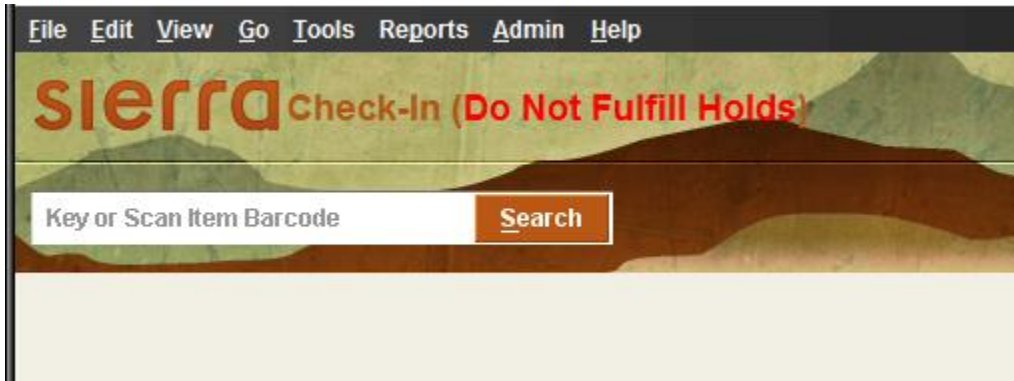
- Item is damaged and you do not want to trap a hold and you are clearing it from patron's card



The screenshot shows the Sierra library system interface. The title bar reads "Sierra · Marmot Library Network · Mike McClellan III staff". The menu bar includes "File", "Edit", "View", "Go", "Tools", "Reports", "Admin", and "Help". The "Tools" menu is open, showing options: "Character Map", "Print Worksheets", and "Check-In (Do Not Fulfill Holds)". A red arrow points to the "Check-In (Do Not Fulfill Holds)" option. The main interface area has a "FUNCTION" dropdown set to "Check-In (No Patron)". Below this, there is a search bar with the text "Key or Scan Item Barcode" and a "Search" button. The "Check-In Date" is set to "Tue Sep 08 2015" with a "Backdate" button. The "Fines" section shows "Total: \$0.00" and a checkbox for "Waive charges on items being checked ...". At the bottom right, it says "Items scanned : 0".

Check-In (No Patron) and check mark the Do Not Fulfill Holds found under Tools

Check-In (Do Not Fulfill Holds)



Remember to reset after you have finished with your item or items

Count Use

- Traditionally used by libraries who track items used within the library but not checked out – Internal Use
 - ▣ Usage stat in Decision Center | Circ Activity - In House in Web Management Reports
- Can be used for special projects since you can't scan barcodes directly into a Create List Review File
- Can be used with SQL reports to import a file of item barcodes from a SQL reporter

Count Use

The screenshot shows the Sierra library system interface. At the top, the title bar reads "Sierra - Marmot Library Network - Mike McClellan III staff". Below the title bar is a menu bar with "File", "Edit", "View", "Go", "Tools", "Reports", "Admin", and "Help". The main header area features the "sierra" logo on the left and a "FUNCTION" dropdown menu on the right. The dropdown menu is open, displaying a list of functions. The function "Count Use - INTL USE" is highlighted with a mouse cursor. Below the header, there is a section for "Current Command" with a "Select Record Type to Modify" dropdown set to "BIBLIOGRAPHIC". Below this is a table with columns "Field #" and "Value". At the bottom of the "Current Command" section, there are input fields for "Record #:" (containing ".b"), "Field:", and "Value:", followed by a "Submit" button. Below the "Current Command" section is a "History" section with a table with columns "#", "Record No.", "Details", and "Status". At the bottom of the interface, there are two buttons: "Clear History" and "Clear All Commands".

Sierra - Marmot Library Network - Mike McClellan III staff

File Edit View Go Tools Reports Admin Help

sierra FUNCTION

Select Record Type to Modify B BIBLIOGRAPHIC

Current Command

Field #	Value
---------	-------

Record #: .b Field: Value: Submit

History

#	Record No.	Details	Status
---	------------	---------	--------

Clear History Clear All Commands

Rapid Update
Headings Reports
Global Update
Data Exchange
High-Demand Holds
Rapid Update
URL Checker

CIRCULATION
Check Out (Circulation Desk)
Check-In (No Patron)
Renew (No Patron)
Search / Holds
Notices
Prepare Overdues Report
View Outstanding Holds
High-Demand Holds
Clear Expired Holds and Holdshelf
Fines Paid
Transfer Paged Items
Collection Agency
Count Use - Portable Reader
Count Use - IUSE3
Count Use - INTL USE
Count Use - COPY USE
Merge Duplicate Patron Records
Delete Records
Delete Items
Bookings Maintenance
Offline File Processing
Bookings Event Maintenance

Count Use

- Requires some coordination within the consortia and within the library
- Identify one of the three fields that is not being used at this moment
 - Use 3
 - Internal Use
 - Copy Use
- Use Create Lists and Rapid Update as needed ahead and after the project to reset your library's items to 0 for your item field

Count Use

- Gather up materials
 - ▣ Subjective Weeding
 - ▣ End of the day
 - ▣ New to old/circ to stacks
- Scan each barcode at least once.
- Use create lists to find the items
 - ▣ Line 1 (agency or location code to limit to your material)
 - ▣ Line 2 (item field you selected is not equal to 0)

Count Use and SQL

- ❑ SQL reports can't be imported directly into Sierra (enhancement)
- ❑ With basic manipulation in notepad can take a file of barcodes and add a special prefix in front of the barcode a:35239000000060
- ❑ Count Use (portable reader) mode to load this file
- ❑ Updates the counter in the items and Create Lists is used to find them using same strategy
- ❑ <http://csdirect.iii.com/documentation/rdifformats.shtml>

Floating Collections

- Reduce amount of material in transit
- Item is checked in at a new location
- Sierra consults float determiner table
- If floats, changes the location code to new location
 - ▣ Requires matching codes at each location
 - ▣ Example: **e**vebd and **e**va**bd** otherwise new code would be eve or eva (minus the shelf designation)
- If doesn't float, put in transit
- Decision Center reports on drought and pooling

Rapid Update Due Date

- Bookmobile misses a stop and won't return for a month
- Create list of items (must be items)
 - ▣ Due date
 - ▣ Checkout location
- Rapid update | Tools | Update Due Date

Rapid Update Due Dates

The screenshot shows the Sierra Marmot Library Network interface. The title bar reads "Sierra · Marmot Library Network · Mike McClellan III staff". The menu bar includes "File", "Edit", "View", "Go", "Tools", "Reports", "Admin", and "Help". The "Tools" menu is open, showing "Character Map", "Print Worksheets", and "Rapid Update Options". The "Rapid Update Options" sub-menu is also open, with "Update Due Date" selected. The main interface has a "FUNCTION" dropdown set to "Rapid Update". Below this, there is a "Select Record Type to Modify" dropdown set to "ITEM". A "Review" dropdown is on the left, and a "Review file:" input field is on the right with a "Start" button. The "Current Command" section shows a table with columns "Field #" and "Value". Below the table, there is a "Field:" input with "65 DUE DATE" and a "Value:" input with "- -20". The "History" section has a table with columns "#", "Record No.", "Details", and "Status". At the bottom, there are "Clear History" and "Clear All Commands" buttons.

Tools – Rapid Update Options – Update Due Date

Only works on review file of item records and can only change Due Date

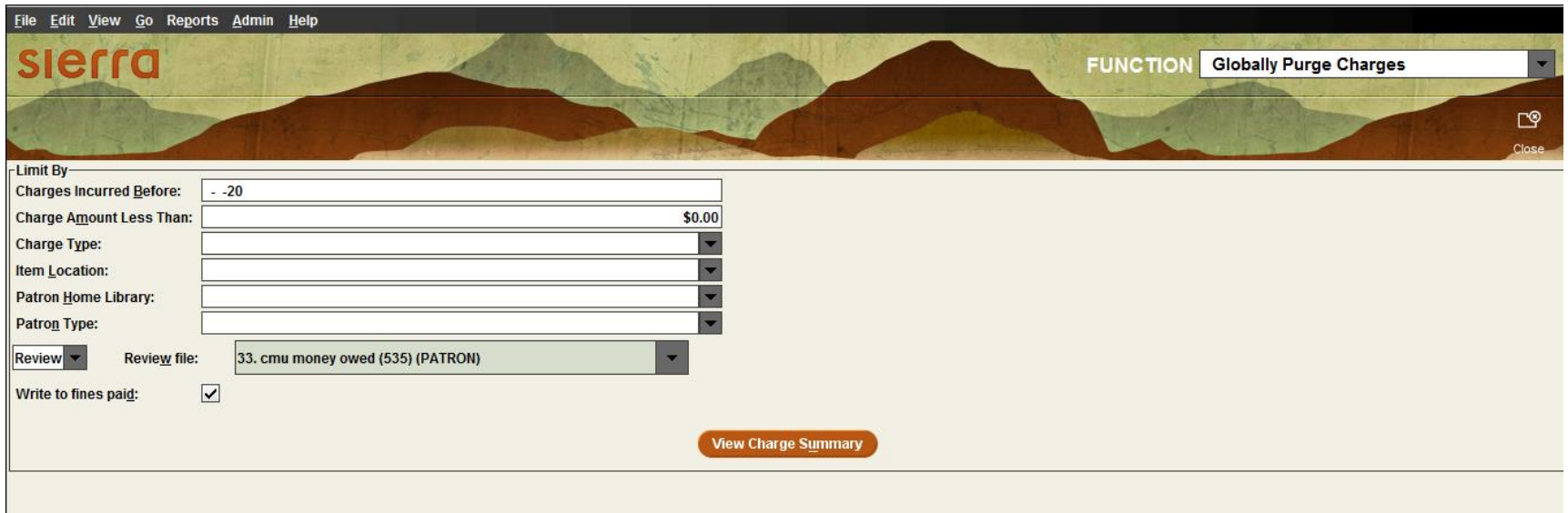
Rapid Update Due Dates

- ❑ The following considerations apply when updating due dates using **Rapid Up**:
- ❑ Loan rule logic is not applied to these transactions.
- ❑ Due date extensions are not affected by patron blocks or expired patrons.
- ❑ Circulation statistics do not reflect these transactions.
- ❑ Notices already queued for printing before the up are still printed. No pre-existing information in any of the notices files is revised.
- ❑ Overnight system jobs that create notices recognize and honor the new due dates.
- ❑ Holds and recalls are not affected by the updated due date.
- ❑ Any bookings associated with the items are overlooked. Priority is given to the patron with the item.
- ❑ The **DUE DATE** value can be set to the present day or forward. No backdating is allowed.
- ❑ Due Dates can be set only by exact date. Hourly values can not be set.
- ❑ INN-Reach items are not eligible for updating.

Globally Purging Fines

- Does what it says it does
 - ▣ Charges are removed
 - ▣ Can not be undone (cheaply)
- Typical use case, library routinely purges inactive patrons. Some of these can not be deleted due to unpaid charges
- Use Create Lists to find inactive patrons with money owed equal to or less than desired amount. Remember how you named or numbered this file.

Globally Purged Charges



The screenshot shows the Sierra library system interface for the 'Globally Purge Charges' function. The interface includes a menu bar with 'File', 'Edit', 'View', 'Go', 'Reports', 'Admin', and 'Help'. The Sierra logo is on the left, and the function name is in a dropdown menu on the right. Below the header, there are several input fields and checkboxes for filtering charges. A 'Review' dropdown is set to '33. cmu money owed (535) (PATRON)'. A 'View Charge Summary' button is located at the bottom right of the form area.

File Edit View Go Reports Admin Help

sierra FUNCTION Globally Purge Charges

Close

Limit By

Charges Incurred Before: - -20

Charge Amount Less Than: \$0.00

Charge Type:

Item Location:

Patron Home Library:

Patron Type:

Review Review file: 33. cmu money owed (535) (PATRON)

Write to fines paid:

View Charge Summary

Note could be done across the data base by mistake

Make sure you select Review.

Select the right file. "Mike Use This One !!!!!!!!"

Write to fines paid. Do you want deniability? We keep no records of what we have purged in uncollected debt?

Holdings – System Settings

- 048 > Holds: Give precedence to local holds.....YES
 - ▣ Local is determined by “pickup location”
- 049 > Holds: Allow multiple title-level holds for one patron.....YES
 - ▣ Book club holds – staff only through Sierra
 - ▣ Sends all holds as a group. Does not distribute based on number of copies at a location
 - ▣ Best to checkout any copies in hand before placing hold otherwise system starts at your library

Paging

- Copies on the shelf that could fill the hold based on loan rule and request rules
- When hold is placed, Sierra builds a list of which items can fill that hold at that moment
 - ▣ List does not update as new copies are added
 - ▣ Assumes Cataloging checks those in
- Always looks at the pickup location first to see if there is a copy that could fill the hold
- Then follows priority order to next copy at a different location until hold gets filled

Hold Priority Table

Hold Pickup Locations Globally Purge Charges

Edit

Display Name (English) Garfield Carbondale Branch C554

Display Name (Spanish) Garfield Carbondale Branch C554

List of Locations

Location
gcc
gccc
gccfi
gccil
gccju
gcclm
gcclp

Add Row Delete Row

Paging Priority

Display Name	Paging Priority
ES Cnerreyn Elementary C130	999
EVLD Avon C728	999
EVLD Eagle C730	999
EVLD Gypsum C720	999
Fort Lewis College	999
Garfield Glenwood Branch C590	600
Garfield New Castle Branch C584	600
Garfield Parachute Branch C516	600
Garfield Rifle Branch C570	600
Garfield Silt Branch C578	600
Grand Co Admin Office C704	800
Grand Co Juniner C702	800

Agency 115 Garfield County Library District

OK Cancel Print

Priority can be a number from 0 to 99, with 99 being the highest priority. A value of 0 blocks requests and holds on available items at a particular branch. Not sure how three digit numbers are being read.

Paging – when does it move?

- Hold placed at 3pm on Monday goes to Carbondale.
- Eligible to move at 3pm on Tuesday
 - ▣ 086 > Pageslips: Number of hours before page can be transferred.....24
- Moves when chron job is set to move.
 - ▣ 6am (typical – Ill Help Desk could confirm)
 - ▣ So page actually moves on Wednesday at 6am

Paging – what happens if never filled?

- Can be canceled automatically
 - ▣ Hold cancel notice if generated
 - ▣ 081 > Hold Cancel Notice: Not wanted after date past: Text #.....8
- Can remain as an outstanding Bib Level hold (appears not to be set currently)
- Can cycle through a new paging list (optional and not currently set at Marmot).

Agency Holds

- Multi branch library systems within Marmot are assigned an agency code in the item and patron records
 - ▣ Groups branches into an agency so Sierra can sometimes consider them as one unit instead of individual branches.
 - ▣ Key is the agency code assigned to the item record. For example 155 Garfield

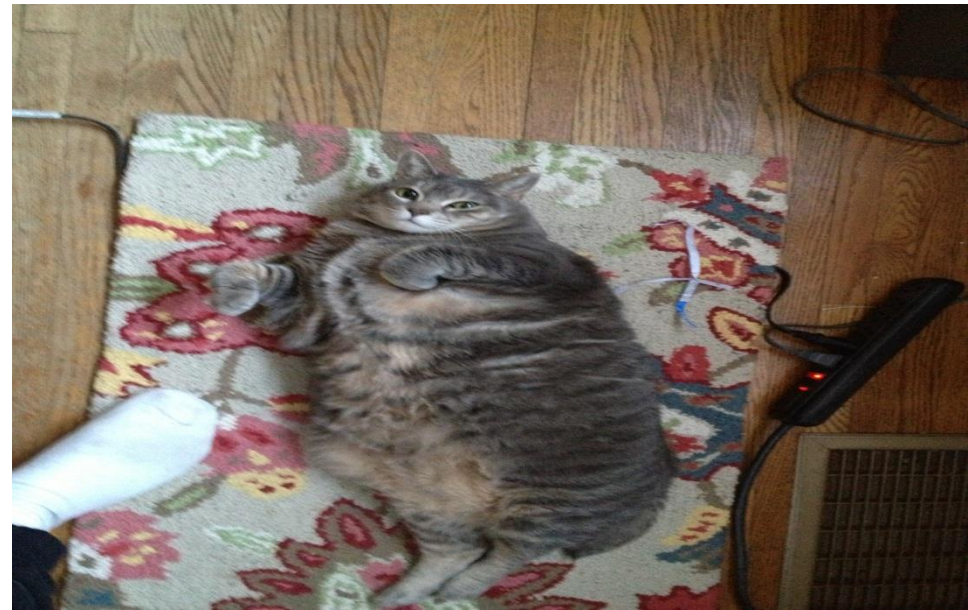
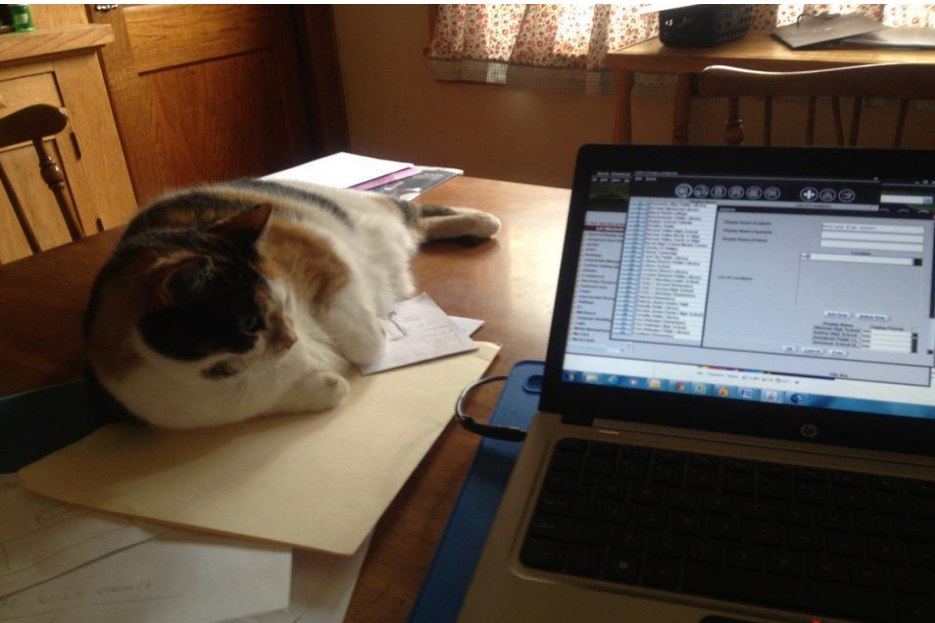
Agency Holds

- An item is checked in with an **AGENCY** fixed-length field value of "155 Garfield" and the **Hold Pickup Locations** table contains five entries assigned the "155 Garfield" agency...
- The system first checks for any local holds – the item matches a hold at that location...
- Next the system checks for holds at each location associated with the five **Hold Pickup Location** entries assigned the "155 Garfield" agency. The "Garfield" system.

Agency Holds

- If the item has multiple holds at one or more of the pickup locations assigned the "155 Garfield" agency, the system fills the hold associated with the "155 Garfield" agency that is earliest in the hold queue
- If the item does not have a hold at any of the pickup locations assigned the "155 Garfield" agency, the system fills the first fillable hold in the hold queue

Questions?



Pebbles and Pompeii say thank you for your attention and carry on!