Sierra Circulation

Checklist

# The following checklist is meant to be a guide to help you organize day-to-day administration of the Sierra System.

# The frequencies we suggest are only recommendations. Your library may perform certain activities more or less often depending upon your needs and policies.

# Daily

[ ]  [Prepare](https://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_notices_prepare.html) and [send](https://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_notices_send.html) notices for all levels of all overdue material, courtesy notices, bills, cancellations, and paging slips.

[ ]  [Clear defunct holds](https://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_holds_clearexpholds.html) from the holdshelf.

[ ]  [View Circulation Status](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_admin_corner_statuscirc.html) in the Admin Corner.

[ ]  [Read and process patron requests](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_admin_corner_patrequestmanual2.html).

* Libraries using manual request processing need to check this file daily, because all requests route to this file.
* Libraries with automatic request processing should check this file daily if the library offers journal article requesting, because all journal article requests route to this file. If your library uses automatic request processing but does not offer journal article requesting, you should still view the file occasionally to check for requests that could not be automatically processed for some reason. You will rarely encounter this situation, but it is possible.

# Weekly

[ ]  Check and clear purchase alerts. See [Viewing Circulation Status: Purchase Alerts to List](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_admin_corner_statuscirc.html).

[ ]  Generate [High Demand Holds Reports](https://documentation.iii.com/sierrahelp/Default.htm#sril/sril_reports_highdemand_holds.html).

[ ]  View or print the [Circulation Overrides](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_backend_sysfiles.html) file and clear the file.

# Yearly

[ ]  [Maintain fields for statistics](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_admin_corner_rapidupdatYTDLYR.html). Update year-to-date counts (YTDCIRC) and last-year counts (LYRCIRC).

[ ]  If your library tracks internal usage via the [Count Usage](https://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_count_countingusage.html) function and prefers to begin each year with a "0" count, zero internal use count fields (IUSE3, COPYUSE, and INTL USE).

# As Needed

[ ]  View [outstanding holds](https://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_holds_outstandingholds.html) and take appropriate action for problem holds, for example:

* Holds on a Bibliographic record that no longer has any items that can fill the holds
* Holds on a Bibliographic record whose order has been cancelled
* Holds on an item that is billed or claims returned
* Holds that meet your library's definition of "problem holds"
* [View outstanding holds report](https://documentation.iii.com/sierrahelp/Default.htm#sril/sril_reports_outstandingholds.html)
* [Manage outstanding holds](https://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_holds_manageoutstanding.html)

[ ]  View, print and/or export circulation statistics. See [Using the Web Management Reports Spreadsheet Interface](https://documentation.iii.com/sierrahelp/Default.htm#sgwr/sgwr_spreadsheet.html) and [Using the Web Management Reports Web Browser Interface](https://documentation.iii.com/sierrahelp/Default.htm#sgwr/sgwr_browser.html).

[ ]  View, print, or export [Fines Paid](https://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_fine_allfinespaid.html) information.

[ ]  Manage bounced circulation notices sent via email. (These notices will bounce to a library-designated fully qualified email address.) See [Configure Outgoing Mail for Sierra.](https://iii-itlc.s3.amazonaws.com/LibGuides/LibGuides%2BArticles%2Band%2BDocs/Sierra/System%2BAdministration/Articles/SYS%2BSierra%2BHTG%2B%2BConfigure%2BOutgoing%2BMail%2B20220301.pdf)

[ ]  Update [Circulation Parameters](https://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_circ_parameters.html). For example, update Julian calendar absolute dates in loan rules. Update the Days Closed and Hours Open tables.

[ ]  If your system has Innovative’s [Inventory Control](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_admin_corner_inventory_ctrl.html) module or [Circa Wireless Inventory](https://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_wrls_wkst_intro.html) (barcode or RFID), take inventory and update item records.

[ ]  Clear [Inventory Control](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_admin_corner_inventory_comparescan.html) files from your PC.

[ ]  Update expiration date in Patron record [templates](https://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_settings_template_edit.html).

[ ]  Update BEGIN and END dates in Course record [templates](https://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_settings_template_edit.html).

[ ]  [Prepare](https://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_notices.html) statements of checked out items and/or statements of charges.

[ ]  Search for and clean up “lost” on-the-fly records.

[ ]  Periodically [batch check-in](https://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_admin_corner_batch_chkin.html) items before deleting long overdue items or old Patron records with outstanding transactions.

This publication is supplied for the exclusive use of customers of Innovative Interfaces with the understanding that it shall not be shown or distributed to anyone outside of the customer's organization without the prior written permission of Innovative Interfaces. This publication may be copied only if the copies are for the exclusive use of staff members of libraries that have purchased the Innovative system.

© 2022, Innovative Interfaces, Inc.