



SIERRA CIRCULATION

Introduction to Circulation Parameters

General overview of circulation parameters and links to relevant documentation.

Topics:

- Codes
- Tables
- Circulation Options

Codes

[Fixed-length Fields](#) and [Fixed-length codes](#) are used for gathering statistics and grouping records in Create Lists. In addition, patron type, item type, and item location are used by the system to determine which loan rule will be selected during circulation transactions.

- [Patron Type \(PTYPE\)](#)
 - The Patron Type table is a 256-line numeric table, with values 0-255.
 - Special patron situations may require additional patron types, such as teacher cards, homebound patrons, corporate borrowers, bookmobile patrons, etc.
 - The library may also choose to create additional patron types for statistics gathering, even if library policy doesn't require them for loan rule selection.
- [Item Type \(ITYPE\)](#)
 - The Item Type table is a 256-line numeric table, with values 0-255.
 - If item types are not being used, label item type 000 as "undefined."
 - Though the rule selection table determines circulation by a combination of item location, patron type, and item type, in many instances library policy may base circulation rules on just patron type and location. When two items in one location would circulate differently to the same patron, item types will be needed to distinguish between the two, for example, 2-hour reserve and 4-hour reserve or 7-day DVD and 14-day DVD.
 - The library may also choose to create additional item types for statistics gathering, even if library policy doesn't require them for loan rule selection.
 - In any situation where even one loan rule element would be different for a given patron-item combination, you must create a new loan rule.
- [Pcode 1](#), [Pcode 2](#), [Pcode 3](#), and (if library purchased Consortium Management Extensions) [Pcode 4](#)
 - Pcode 1 and Pcode 2 are 32-value alphanumeric codes.
 - Pcode 3 and Pcode 4 are 256-line numeric codes with values 0-255.

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Tables

The following tables form the foundation for the circulation module functionality

- [Days Closed](#)
 - A dynamic table, maintained on an ongoing basis.
 - Used to assign due date and assess fines.
 - The table always reads a year ahead from the current date. You may not enter a specific year.
 - The system reads Days Closed from bottom to top.
 - When calculating the expiration date for a hold on the holdshelf based on a Time to Pickup element, the system does not count days the library is closed towards days spent on the hold shelf.

FAQ: How will Days Closed affect the maximum amount of fines that could accumulate for an overdue book if the library doesn't charge for days closed (set in system circulation options)?

Suppose the library has a maximum overdue fine of \$5.00 assessed over 50 days (at .10 per day) and that over the next 29 days, the library is open 20 days total. A patron's book was due 29 days ago. If the book were checked in at day 29, fines would only be assessed on the 20 days the library was open (\$2.00). The system will continue cumulating fines for 50 *open* days so that the maximum fine will be charged, but the 50 open days will not be 50 consecutive calendar days, unless the library is open for 50 consecutive days.

- [Hours Open](#)
 - This table does not have to be input if the library has no hourly loans and does not plan to book materials.
 - If an hourly item would be due at a time the library is closed, the system makes it due at closing time or one hour after opening time the next day, depending on the Loan Rule Code. If the library is closed the entire day when the item falls due, it will be due at opening time the next day that the library is open.
 - The system reads Hours Open from bottom to top.
- [Loan Rules](#)
 - You must create a non-circulating loan rule as the first entry in the Loan Rule Determiner table. Text numbers and fines should be entered in non-circulating loan rules, in the event that a library staff member overrides and allows a non-circulating item to circulate. Set non-circulating loan rule holdable/bookable elements to no.
 - The system uses the Text Overdue Recall (Text OdueR) notices when an item is recalled and becomes overdue or when an item is on hold and becomes overdue. All libraries should enter notice text numbers in these loan rule elements. The text

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numbers used for Text Overdue (Text Odue) elements may be repeated for Text OdueR elements if the library does not wish to create alternate texts.

- Enter the bill text number in the Msg Bill field, not Text Overdue (Text Odue) field. A Msg Bill text number of "0" will neither assess a bill (change status to "n" and charge the patron) nor generate a notice. Additionally, the item fixed-length field No. of Overdues does not increment by 1.
- Once created, loan rules should NEVER be deleted, although they may be repurposed.
- Loan Rule Determiner
 - The first entry in the table should be set up to apply to all item locations, patron types, item types, and age ranges (that is, item location is ?????, patron type is 999, item type is 999, and age range is <blank>) and should refer to a non-circulating loan rule that is active. **(REQUIRED)**
 - The table is read from the bottom to the top, and the system stops reading when a match is found.
 - **Examples of Table Entries**

Single Branch Library (entire table)

LOCATION	PATRON TYPE	ITEM TYPE	AGE RANGE	RULE NUMBER	ACTIVE
01 > ?????	999	999		1	Y
02 > mmed	20,21	999		6	Y
03 > mmed	24	999		8	Y
04 > mcol	20	999		3	Y
05 > mcol	25	999		23	Y
06 > mcol	26	999		11	Y
07 > mcol	21	999		4	Y
08 > mcol	22	999		1	Y
09 > mcol	23	999		9	Y
10 > mcol	24	999		5	Y
11 > ?????	999	999		13	Y
12 > ?????	999	12	-16	14	Y
13 > ?????	27	999		22	Y
14 > ?????	999	14,15		19	Y

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15 > jcol	999	999		2	Y
16 > ?????	28	999		18	Y

Multi Branch Library (section of table)

LOCATION	PATRON TYPE	ITEM TYPE	AGE RANGE	RULE NUMBER	ACTIVE
0835 > uv*	124	4,13		415	Y
0836 > uv*	124	8		378	Y
0837 > uv*	219-221,249	4,12,13,30,100		377	Y
0838 > va*	999	999		408	Y
0839 > va*	240-248	0,1,3,7,9,10,11		399	Y
0840 > va*	240-248	4,30,104,130		415	Y
0841 > va*	240-248	31,131		425	Y
0842 > va*	1-125,127-128	30,130		276	Y
0843 > va*	1-125,127-128	31,131		320	Y
0844 > va*	1-218,222-239	0,1,3,9-12,20		128	Y
0845 > va*	1-218,222-239	4,104		208	Y
0846 > va*	219,-221,249	0,1,3,4,7,9-11	-16	377	Y
0847 > wn	125,126,128	0,1,3		126	Y
0848 > wn	001-124,127-217	0,1,3		127	Y
0849 > wjn	125,126	100,101,103		126	Y

- [Patron Blocks](#)

- Enter a 999 (all patron types) wildcard line at the bottom of the table. If the system does not find a patron type elsewhere in the table, it will use the wildcard entry's values. (REQUIRED)
- The table is read from top to bottom, and the system stops when a match is found. Make sure the 999 entry is the last entry.
- The overdue notice for a recalled item is considered to have an overdue notice level number of 7. To NEVER block for overdue recalls or overdue on items that had holds at the time of checkout, make the number (highest level overdue) in the Patron Block Table 8 or higher.
- If fines are not yet assessed, they do not figure into the maximum amount owed. Fines are not assessed until the book is returned.

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- "0" in MAX ITEMS or MAX OWED will block the patron from checking out.

- [Locations Served](#)

- This table contains named lists of location codes.
- Examples of list names are "Main" and "North Campus".
- The location codes in the list correspond to branch locations.
- These named lists of location codes are called "Locations Served" lists.
- Each list can contain a maximum of 1,000 location codes.
- A location code can appear in more than one list.

Locations Served Table (schematic example)

LOCATION SERVED NAMES	LOCATION CODES			
Main	ref	nfc	per	art
North Campus	ref	spe	ctr	
South Campus	ref	eme		

- [Text of Circulation Notices](#)

- "drop hold" and "checked out" notices are customized notices for, respectively, holds canceled by staff and statements of checked out items. Library staff may create as many of these as desired with appropriate names, e.g., drop hold - lost, drop hold on reserve, checked out graduating. "drop hold" and "checked out" MUST be entered in lower case.
- Notices, once entered, cannot be deleted. No longer used notices may be renamed as "unused" or staff may enter a new text for the same number and repurpose it.
- A zero in any notice text field (entries found in both loan rules and circulation options) means that a notice will not print for that notice text. For example, if the loan rule field Text Fifth OdueR has a value of "0" then no fifth overdue recall notice will print.

- [Email Subject](#)

- Used to create alternate subject lines for circulation notices that are sent by email.

- [Hold Pickup Locations](#)

- This table allows the system to input a label to appear on hold pickup notices, paging slips, and the hold slips printed for items being placed on the hold shelf. The labels may also display in WebPAC for libraries that allow patrons to select a pickup location for patron-placed holds.
- If your library has enabled the Title Priority Paging feature, you can customize title-level paging in the Paging Priority table element of the Hold Pickup Locations table. You can designate locations that should not be paged, indicate the order in which

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locations should be paged, and group locations at the same paging level so that, within that group, locations are paged in random order.

- Innovative recommends that all locations associated with a hold pickup location be entered into Hold Pickup Locations. This ensures that even if a staff member enters a location not normally used as a hold pickup location when placing a hold, the correct pickup location will print on the pickup notice, rather than the location name of the location incorrectly entered as the pickup location.

Hold Pickup Locations Example

HOLD PICKUP LOCATION	ASSOCIATED LOCATIONS	WHAT HAPPENS
Main Circulation Desk	main	A hold pickup notice for a hold where the pickup location was mistakenly entered as mvid shows the pickup location as Main Video Collection.
North Campus	main, mbio, mcd, mdvd, meas, mer, mfic, mjf, mjnf, mmus, mnfic, mper, mpb, mpbk, mref, mvid	A hold pickup location notice for a hold where the pickup location was mistakenly entered as mvid shows the pickup location as Main Circulation Desk.

- [Time to Reshelve](#)
 - Contains messages that reflect that an item was recently returned (checked in) or recently processed (attached to a bibliographic record).
 - In order to use this feature to display a message for items that have been checked out and returned, libraries must turn on the Circulation System Option: [Check-in: Store check-in time in item record](#).
 - The asterisk "*" cannot be used with a partial location code in the Time to Reshelve table. Each location must be specified separately in the table, or use the wildcards "*" or "?????" to indicate all locations.
 - Items checked in at the non-owning location will display "in transit" until checked in at the home library, at which time they will display the time to reshelve message.
- [Time to Holdshelf](#)
 - Contains alternate messages that display instead of On Holdshelf when an item has recently been checked in at the pickup location to fill a hold.
 - The asterisk "*" cannot be used with a partial location code in the Time to Holdshelf table.

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- [Branch Addresses](#)
 - In [Branches](#), staff enter the appropriate circulation address number from the Branch Addresses table into each branch code, and this determines what return address will print out on the circulation notice.
- [Holds Thresholds](#)
 - In the Hold Thresholds table, specify a number of holds (threshold) for a hold pickup location and material type that will cause titles with the specified pickup location and material type and holds exceeding the threshold number to appear on the High Demand Holds Report.
- [Predefined charges](#)
 - Use the Predefined Charges table to define manual charges that staff can apply to patron records.
- [Grouping Call Number for Statistics Reports \(SCAT table\)](#)
 - This table lists call number ranges by which the library wishes to track activity and get statistics.
 - The SCAT table is used for all system statistics by call number.
- [Library Priority](#)
 - This table is available for libraries that do not use Title Priority Paging.

Other tables may be present on your system if your library purchased and installed additional products:

- [Bookings Preparation](#)
- [Collection Agency Settings](#)
- [Float Determiner](#)
- [Collection Agency Settings](#)
- [Float Determiner](#)
- [Held Item Delivery Locations](#)
- [Language Preference](#)
- [Predefined Routes](#)

See Configuration Files and Tables in Sierra WebHelp for a complete list.

Circulation Options

The library can set [circulation options](#) that govern circulation system behavior. See [Circulation Options that can be Grouped](#).

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