Training

SIERRA

Temporary Location Close and Reopen

If a location or branch is closing temporarily for renovation, repairs, emergencies, etc., you may wish to change WebPAC displays of the items at that location or adjust their availability for holds.

This resource provides guidance for the following phases of a temporary location closing:
- Closing the location
- Reopening the location

Closing the Location

Decisions to make when planning for a temporary close

Should items still appear in the WebPAC?

f yes, then no change is necessary although you may want to change the name associated with the location to indicate it is closed temporarily. You can also use the LOC web option to provide information to patrons using the WebPAC.

If no, then create a list of all items with this location code and, using the rapid update program, change the fixed-length field that controls suppression of the item records. You may want to establish a new code for suppression of item records, e.g., ICODE2=t for TEMP CLOSED. However, before using this code, have the Help Desk set up the code for record suppression.

NOTE: Allow sufficient time to rapid update all of the items at that location.

Should items be available for request from the WebPAC?

If yes, then **no change** is necessary.

If no and your system has the Title Priority Paging feature enabled, you can do the following:

Edit all priorities for the closed pickup location to '0' (zero). The priority of '0' (zero) excludes the location from further pages, except in cases where the pickup location chosen for the hold is the closed location.
Remove the pickup location from the Hold Pickup Locations table. This step prevents patrons and staff from choosing the closed location as a pickup location and stops pages for that closed location.

NOTE: If your library allows patrons to change their pickup locations in in WebPAC (via the CHANGE_HOLD_LOC web option), and the pickup location is not in the Hold Pickup Locations table, My Millennium will not correctly display the patron's holds with that pickup location. Instead, the first location in the Hold Pickup Locations table will display, and if the patron updates the hold in any way, the pickup location will change, even if the patron did not explicitly select the pickup location for updating. See Viewing and Modifying Patron Requests

NOTE: Changing the priorities to '0' (zero) or removing the pickup location will not remove pages for the closed location that occurred before the changes were made. You can ignore these older pages as they will eventually move to the next location in the priority list according to the Pageslips: Number of hours before page can be transferred Circulation option. Alternatively, staff can continue to print the paging list for the closed location and refuse the pages by checking in items and choosing "Checkin: Do not fulfill hold" at the prompt.

If your system is not using Title Priority Paging and has the Library Priority table set up in Circulation Parameters, change the priority of this library to '0' (zero) in the Library Priority table to exclude the items at this location from title-level holds and title-level holds placed by staff. Editing the Library Priority table in Millennium Circulation automatically restarts automatic patron request processing.

To ensure that items at this location are excluded from item-level holds in the WebPAC, request that the Help Desk also update the Request Rule table to add the location code(s) for the location that is closing.

Staff must not place item-level holds on items from the location that is closing. This location should not be removed from the Branches table, so staff should not choose items from that location when placing item-level holds. To determine whether staff have placed holds on items at the closed branch, print out the item paging slips for that branch on a regular basis.

Should checkin and order records be suppressed from the WebPAC?

If yes, then create two lists, one of checkin records with the location code(s) for the location that is closing and one of order records with the location code(s) for the location that is closing. Make sure that a suppression code is set up for the suppression of checkin and order records from the WebPAC. If no suppression code is set up or if you want to set a new suppression code for checkins and orders, contact the Support before using the suppression code.

The suppression of checkin records is recommended, particularly if the items being checked in will not be available to the library's patrons. However, if the ordered items will become available for requests after being received and processed it is not necessary to suppress the order records from the WebPAC.

If no, then no change is necessary.

Should the location be offered as a pickup location?

If yes, then no change is necessary; however, if the location is closed, items could not be picked up at that location.

If no, then remove the location as a pickup location from the WebPAC display by removing the entry for the location from the Hold Pickup Location file in Parameters. Restart the WebPAC Server after changing the Hold Pickup Location file.

NOTE: If your library allows patrons to change their pickup locations in in WebPAC (via the CHANGE_HOLD_LOC web option), and the pickup location is not in the Hold Pickup Locations table, My Millennium will not correctly display the patron's holds with that pickup location. Instead, the first location in the Hold Pickup Locations table will display, and if the patron updates the hold in any way, the pickup location will change, even if the patron did not explicitly select the pickup location for updating. See Viewing and Modifying Patron Requests

Staff should not choose the relevant location code(s) as a pickup location when placing a hold through Millennium Circulation.

Should the pickup location in existing holds be changed?

If yes, then use the function View Outstanding Holds, limiting the holds to those at the location that is closing. This will list all items that have that location as a pickup location in holds. Then change each hold pickup location individually; there is no batch process to update the hold pickup location.

If no, then no change is necessary.

Should circulation notices go out with a different return address?

If yes, then in the Branches table, change the Circulation Address Number in the location code entry or entries for the location that is closing. Choose another Circulation Address Number for a location that is open.

If no, then no change is necessary.

For libraries with the Floating Collection product: Will the book drop for the location that is closed be locked?

If yes, then no change is necessary.

If no and patrons can leave items in the book drop and the system has the Float Determiner table set up, items checked in at the closed location should not be allowed to "float." Set an entry in the Float Determiner table that blocks any items checked in with a terminal location for the closed library from floating. Any items that are checked in at the closed location that do not belong at that

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location will be checked in according to the settings in Circulation Options for checkin at wrong location.

NOTE: "Floating Collection" is a product that must be purchased. This option will not work if not purchased.

Will items from the closed branch be used to fill holds if returned at other branches?

If yes, then no change is necessary.

If no, then set the "holdable" element in loan rules applying only to that branch to "no". If the same loan rule is used for multiple branches, staff may not be able to update the holdable element.

NOTE: You do not need to enter the branch as closed in the Days Closed table. No changes to the Days Closed table are necessary for a temporary closing.

Reopening the location

When a library branch reopens, follow the steps below:

1. Remove the suppression codes from any records suppressed from the WebPAC, e.g.., items, checkins, and/or orders. Use the Create Lists function to gather all of the suppressed records into review files and use the Rapid Update function to remove the suppression code from the records. This step is unnecessary if you did not suppress records when the location closed.

2. Change the name associated with the location code(s) of the closed branch to remove any indication the location is closed. This step is unnecessary if you did not change the name of the location code(s) when the branch closed.

3. If your library uses Title Priority Paging, reset priorities for the branch to the appropriate values. If your library does not use Title Priority Paging and has the Library Priority table set up, change the table to allow title-level holds for this location. This step is unnecessary if you did not change the priority for the closed location to '0' (zero).

4. Contact the Help Desk to remove the blocks on item-level holds for the closed location from the Request Rule table. This step is unnecessary if you did not block item-level holds.

5. Add the location back in to the Hold Pickup Location file in Circulation Parameters. This step is unnecessary if you did not remove the location from this file.
6. Change the Circulation Address Number in the location code(s) for this location back to the correct return address to be used on Circulation Notices. This step is unnecessary if you did not change the Circulation Address Number in the location code(s).

7. Remove the entry from the Float Determiner table that blocks items returned at the closed location from "floating." This step is unnecessary if you did not add a line to the Float Determiner table blocking these items from "floating".
NOTE: "Floating Collection" is a product that must be purchased. This option will not work if not purchased.

8. Reset the "holdable" element in loan rules that were updated to "no" back to "yes". This step is unnecessary if you did not change the "holdable" element in loan rules.