

Sierra Circulation parameters

Circulation parameters enforce your library's policies and practices within Sierra. Circulation parameters determine whether and how items circulate to patrons, the days and hours the library is open, how to fill holds, when and how much to fine patrons, and when to report delinquent patrons to a collection agency.

Underlined topics below are hyperlinks to the Sierra documentation (<http://documentation.iii.com/sierrahelp>) and other resources. Right-click the text, select Copy Hyperlink and paste the URL directly into a browser. A valid login is required to use these resources.

Underlined topics below are hyperlinks to the Sierra documentation (<https://documentation.iii.com/sierrahelp/Default.htm>) and other resources. Click on the link to open on browser, or right-click the text, select Copy Hyperlink and paste the URL directly into a browser.

Tip: Links leading to Supportal work best if you are logged in to Supportal before you use the link (<https://iii.rightanswers.com/portal/>)

This schedule is flexible and subject to change.

Introduction

- Introduction of trainer and trainees
- Review of current circulation workflow
- [Checkout criteria flowchart](#) (Sierra Knowledge Base)
- [Logging in to the Sierra Desktop Application](#) or [Sierra Web](#)

Retrieving patron records

- [Searching selected database indexes](#)
- [Barcodes: Overview](#)
- [Patron Partitioning](#) (optional feature)

Record types created in circulation

- [Fixed-length fields in patron records](#)
- [Fixed-length fields in item records](#)
- [Variable-length fields in patron records](#)
- [Variable-length fields in item records](#)
- [Mandatory fields](#) (optional feature)

Configuration files and tables

- [Branches table](#)
 - [Branch addresses table](#)
- [Item types table](#)
- [Item status codes table](#)
- [Patron type table](#)
- [Fixed-length fields in patron records](#)

- PCODES 1 & 2 (Patron Code 1 and 2)
- PCODE 3 table (Patron Code 3)
- Home Library
- Patron blocks table
- Consortium Management Extension (optional product)
 - Agency file
 - PCODE 4 table (Patron Code 4)
- Statistical group maintenance table
- Text of circulation notices table
- Email subject table
- Loan rules table
- Loan rule determiner table
- Fixed-length field names
- Variable-length field names

Other tables

- Fines and charges
 - Predefined charges table
 - Payment types table
- Library calendar
 - Days closed table
 - Hours open table
 - Time to reshelve table
- Holds
 - Hold pickup locations table
 - Hold thresholds table
 - Time to holdshelf table
- Optional holds functionality
 - Title priority paging
 - Using volume level holds (optional product)
 - Consortium management extensions (optional product)
 - Agency holds
- Setting up automatic patron request processing (Patron-placed holds in Encore or WebPAC)
 - Request worksheet (form will be provided)
 - Enable automatic request processing (Supportal service commitment for customers already live on Sierra)

Circulation settings in the Administration App

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- Administering user Options
 - Due slip options
 - Patron display options
 - Holds options

Circulation settings in Admin Corner

- Locations served
- Circulation options
 - Sierra circulation options that can be options grouped (Sierra Knowledge Base)
- OPAC options (Options #13, 16, 19-23, 28-33, 46)
- Group call numbers for statistical reports

Other circulation features which may require setup ready for training

- Printing circulation notices with print templates
- Generating date due slips
 - Print templates: Due slip data library [mandatory with email due slips]
- Print Templates – iReport [download]

Optional products which may require setup

- SIP2 circulation interface (optional product for SelfCheck units)
 - Automated self check-out messages
- Collection agency settings table (optional product)
- Held item delivery locations table (optional product)
- Language preference table (optional if multiple language interface)
- Transferring ownership of items and collections among locations (optional products: Mobile, Floating, Deposit Collections)

Supporting documentation

- Sierra WebHelp – Browse tab
- Sierra LibGuide
 - Circulation Parameters: an introduction
- Supportal

Please feel free to evaluate your training experience by filling out the Training Survey form at <https://innovative.libwizard.com/f/training-feedback>

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