

Sierra Circulation

The circulation-related functions in Sierra enable you to carry out and manage your library's day-to-day circulation activities, such as checking items out and in, placing holds, collecting fines, and sending circulation notices.

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.

A copy of the Sierra documentation is located on your own Sierra server and can be opened from within the Sierra staff application: **Admin** | **Manual**. Hyperlinked text can be used to search for topics in the local copy of the documentation.

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
- [Logging in to the Sierra Desktop Application](#) or [Sierra Web](#)
- Brief review of Circulation parameters
- [Checkout criteria flowchart](#) (Sierra Knowledge Base)

Retrieving patron records

- [Searching selected database indexes](#)
- Circulation Desk overview – [patron information tabs](#)

Managing patron records

- [Creating a patron record](#)
 - [Fixed-length fields in patron records](#)
 - [Variable-length fields in patron records](#)
 - [Templates for new records](#) (patron)
- [Copying patron records](#)
- [Creating patron records on-the-fly](#)
- [Data Exchange: importing and exporting records](#) (discussion)
- [Editing records in Sierra](#) (patron)
- [Linking patron records](#)
- [Managing lost library cards](#)
- [Merging duplicate patron records](#)
- [Deleting records](#) (patron)

Checking out items

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- Checking out items
 - Possible blocks when checking out an item
 - Checking out items that have special conditions
 - Due slips
 - Generating date due slips
 - Overriding the calculated due date
 - Adding messages at checkout (item)
 - Checking out items to homebound patrons (optional product)
 - Creating item records on-the-fly
 - Templates for new records (bibliographic and item)
 - Settings – On-the-fly records

Working with checked out items

- Viewing checked out items
 - Fixed-length fields in item records
 - Variable-length fields in item records
- Renewing items
 - Renewing items from a patron's record
 - Changing due dates for renewed items
 - Renewing items without a patron's record
 - Renewing items with title or volume holds
 - Viewing renewed item
 - Automatic renewal
- Claiming items returned
 - Possible messages (claiming items returned)
- Marking items lost
- Marking items damaged (optional feature)

Placing holds

- Placing a title-level hold (bibliographic or copy returned soonest)
- Placing an item-level hold
- Placing a volume-level hold (optional product)

Checking in items

- Checking in items that have special conditions
- Checking in items – patron present
- Checking in items – no patron (patron not present)
 - Do not fulfill holds
- Checking in items from homebound patrons (optional product)

- [Backdating checked-in items](#)
- [Managing in-transit items](#)
- [Viewing checked in item](#)

Managing holds

- [Using the request rule file \(review\)](#)
- [Holds and bookings display](#)
- [Viewing outstanding holds](#)
- [Modifying hold information](#)
- [Transferring holds from one queue to another](#)
- [Resequencing a hold queue](#)
- [Transferring paged items](#)
- [Cancelling holds](#)
- [Viewing cancelled holds](#)
 - [Replacing cancelled holds](#)
- [Managing defunct holds](#)
- [Clearing defunct holds](#)
- [Generating high demand holds reports](#)

Fining and penalizing patrons

- [Adding fines to patron records](#)
 - [Charging overdue fines](#)
 - [Billing lost or unreturned items](#)
 - [Adding a manual charge](#)
- [Adjusting fine amounts](#)
- [Collecting money for fines](#)
- [Reinstating fines](#)
- [Viewing a patron's history of fines paid](#)

Using circulation notices

- [Specifying how notices are prepared and sent](#)
- [Creating circulation notices](#)
 - [Saving and scheduling notice jobs \(optional feature\)](#)
 - [Managing auto notices](#)
- [Sending prepared notices to patrons](#)
- [Viewing notice history \(optional feature\)](#)
- [Printing circulation notices with print templates](#)
- [Using SMS alerts \(optional product\)](#)

Additional circulation-related functions/products

- Counting usage
- Viewing the recent circulation history of an item (optional feature, requires director/coordinator approval, records last five checkouts)
- Reporting delinquent patrons to a collection agency (optional product)
- Creating the homebound patron report (optional product)
- Floating/Mobile/Deposit collections/Held item delivery (optional products)
- Mobile Worklist (optional product) (discussion)
- Using offline circulation
 - Download and install Sierra Offline Circulation (Supportal)

Managing Circulation

- Viewing system-generated review files and Copying a review file (On Search file)
- Globally purge charges
- Viewing all fines paid (and exporting and clearing the file)
- Delete records (batch deletion of records)

In Administration App or Admin Corner

- Check missing items and clear the On-search file (in Admin Corner)
- Rapid updating for YTD/CIRC (Year to date and Last year circ fields) (discussion) (in Admin Corner)
- Administering system files (Viewing circulation overrides) (in Administration App)
- Review of Circulation System Options (in Admin Corner)

Circulation reports and statistics

- Using the Web Management Reports web browser interface
Reports | Web Management Reports (or <http://yourcatalogIP/manage>)
- Using the Web Management Reports spreadsheet interface
Reports | Circulation Activity Reports (or <http://yourcatalogIP/iii/webprpt>)
- Using Statistics function
- Creating lists (review files)
- Decision Center (optional product) (discussion)

Preparing to go live with circulation (discussion)

- Preparation for going live
 - Pre-migration checklist (Sierra Implementation Manual)
- Checkout procedures during circulation migration
 - Using offline circulation

Supporting documentation

- Sierra WebHelp– Browse tab
- Sierra LibGuide

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- Circulation checklist [Circulation checklist](#)

- [Supportal](#)

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