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](http://documentation.iii.com/sierrahelp/Default.htm#sdesktop/sdesktop_logging_in.html) or [Sierra Web](https://documentation.iii.com/sierrahelp/Default.php#sweb/sweb_accessing.html)
* Brief review of Circulation parameters
* [Checkout criteria flowchart](http://documentation.iii.com/sierra/kb/article.php?cat_id=0&typ_id=3&art_id=1343) (Sierra Knowledge Base)

# [Retrieving patron records](https://documentation.iii.com/sierrahelp/Default.php#sgcir/sgcir_patron_retrievingapatron.html)

* [Searching selected database indexes](https://documentation.iii.com/sierrahelp/Default.php#sgil/sgil_search_database.html)
* Circulation Desk overview – [patron information tabs](https://documentation.iii.com/sierrahelp/Default.php#sril/sril_disp_patrontabs.html)

# Managing patron records

* [Creating a patron record](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_maint_createpatron.html)
  + [Fixed-length fields in patron records](http://documentation.iii.com/sierrahelp/Default.htm#sril/sril_records_fixed_field_types_patron.html)
  + [Variable-length fields in patron records](https://documentation.iii.com/sierrahelp/Default.php#sril/sril_records_varfld_types_patron.html)
  + [Templates for new records](http://documentation.iii.com/sierrahelp/Default.htm#sgil_maint_templates_manage.html) (patron)

* [Copying patron records](https://documentation.iii.com/sierrahelp/Default.htm" \l "sgil/sgil_maint_copy_pat.html)

* [Creating patron records on-the-fly](https://documentation.iii.com/sierrahelp/Default.htm" \l "sgcir/sgcir_maint_createpatsonfly.html)
* [Data Exchange: importing and exporting records](http://documentation.iii.com/sierrahelp/Default.htm#sgil_data_exchange.html) (discussion)
* [Editing records in Sierra](http://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_maint_edit_records.html) (patron)

* [Linking patron records](https://documentation.iii.com/sierrahelp/Default.htm" \l "sgcir/sgcir_link_linkpatrons.html)
* [Managing lost library cards](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_patron_lost_card.html)
* [Merging duplicate patron records](https://documentation.iii.com/sierrahelp/Default.htm" \l "sgcir/sgcir_merge_mergepatrons.html)
* [Deleting records](https://documentation.iii.com/sierrahelp/Default.php#sgil/sgil_maint_delete_records.html) (patron)

# Checking out items

* [Checking out items](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_ckout_checkingoutitems.html)
  + [Possible blocks when checking out an item](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_msg_chkoutblocks.html)
  + [Checking out items that have special conditions](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_msg_chkoutmessages.html)
  + [Due slips](https://documentation.iii.com/sierrahelp/Default.php#sril/sril_notices_due_slip.html)
    - [Generating date due slips](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_print_printdatedueslip.html)
  + [Overriding the calculated due date](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_ckout_overrideduedate.html)
  + [Adding messages at checkout](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_ckout_add_messg.html) (item)
* [Checking out items to homebound patrons](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_ckout_homeboundpatrons.html) (optional product)
* [Creating item records on-the-fly](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_maint_createitemonfly.html)
  + [Templates for new records](http://documentation.iii.com/sierrahelp/Default.htm#sgil_maint_templates_manage.html) (bibliographic and item)
  + Settings – [On-the-fly records](https://documentation.iii.com/sierrahelp/Default.php#sgil/sgil_settings_onthefly.html)

# Working with checked out items

* Viewing checked out items
  + [Fixed-length fields in item records](https://documentation.iii.com/sierrahelp/Default.php#sril/sril_records_fixed_field_types_item.html)
  + [Variable-length fields in item records](https://documentation.iii.com/sierrahelp/Default.php#sril/sril_records_varfld_types_item.html)
* [Renewing items](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_renew_renewingitems.html)
  + [Renewing items from a patron's record](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_renew_renewwithpatrecord.html)
    - [Changing due dates for renewed items](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_renew_changerenewdate.html)
  + [Renewing items without a patron’s record](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_renew_renewnopatrecord.html)
  + [Renewing items with title or volume holds](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_renew_titleholds.html)
  + Viewing renewed item

* + [Automatic renewal](https://documentation.iii.com/sierrahelp/Default.htm" \l "sgcir/sgcir_renew_autorenew.html)
* [Claiming items returned](https://documentation.iii.com/sierrahelp/Default.htm" \l "sgcir/sgcir_claim_claimingreturned.html)
  + [Possible messages (claiming items returned)](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_msg_claimrtrnnmessages.html)
* [Marking items lost](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_lost_markitemlost.html)
* [Marking items damaged](https://documentation.iii.com/sierrahelp/Default.php#sgcir/sgcir_damaged_markitemdamaged.html) (optional feature)

# Placing holds

* [Placing a title-level hold](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_holds_placetitlehold.html) (bibliographic or copy returned soonest)
* [Placing an item-level hold](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_holds_placeitemhold.html)
* [Placing a volume-level hold](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_holds_placevolhold.html) (optional product)

# [Checking in items](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_chkin_checkinginitems.html)

* [Checking in items that have special conditions](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_chkin_chkinspecial.html)
* [Checking in items – patron present](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_chkin_chkinpatronpresent.html)
* [Checking in items – no patron](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_chkin_chkinnopatron.html) (patron not present)
  + [Do not fulfill holds](https://documentation.iii.com/sierrahelp/Default.php#sgcir/sgcir_chkin_noholdsfilled.html)
* [Checking in items from homebound patrons](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_chkin_homebounditems.html) (optional product)
* [Backdating checked-in items](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_chkin_backdateatchkin.html)
* [Managing in-transit items](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_chkin_transit_manage.html)
* Viewing checked in item

[Managing holds](http://documentation.iii.com/sierrahelp/Default.htm#sgcir_holds_holdsoverview.html)

* [Using the request rule file](http://documentation.iii.com/sierrahelp/Default.htm#sgwpac/sgwpac_request_rule_file.html) (review)
* [Holds and bookings display](http://documentation.iii.com/sierrahelp/Default.htm#sril/sril_disp_holds.html)
* [Viewing outstanding holds](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_holds_outstandingholds.html)
* [Modifying hold information](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_holds_modifyholdinfo.html)
* [Transferring holds from one queue to another](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_holds_transferholds.html)
* [Resequencing a hold queue](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_holds_resequencequeue.html)
* [Transferring paged items](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_holds_display.html)
* [Cancelling holds](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_holds_cancellingholds.html)
* [Viewing cancelled holds](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_holds_viewcancelledholds.html)
  + [Replacing cancelled holds](https://documentation.iii.com/sierrahelp/Default.php#sgcir/sgcir_holds_viewcancelledholds.html)
* [Managing defunct holds](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_holds_mngexpholds.html)
* [Clearing defunct holds](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_holds_clearexpholds.html)
* [Generating high demand holds reports](http://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_highdemand_holds.html)

# [Fining and penalizing patrons](http://documentation.iii.com/sierrahelp/Default.htm#sgcir_fine_finesandcharges.html)

* [Adding fines to patron records](http://documentation.iii.com/sierrahelp/Default.htm#sgcir_fine_addfine.html)
  + [Charging overdue fines](http://documentation.iii.com/sierrahelp/Default.htm#sgcir_chkin_overdueitem.html)
  + [Billing lost or unreturned items](http://documentation.iii.com/sierrahelp/Default.htm#sgcir_billing_item.html)
  + [Adding a manual charge](http://documentation.iii.com/sierrahelp/Default.htm#sgcir_fine_addmanualfine.html)
* [Adjusting fine amounts](http://documentation.iii.com/sierrahelp/Default.htm#sgcir_fine_adjustfine.html)
* [Collecting money for fines](http://documentation.iii.com/sierrahelp/Default.htm#sgcir_lost_collectmoney.html)
* [Reinstating fines](http://documentation.iii.com/sierrahelp/Default.htm#sgcir_fine_reinstatefine.html)
* [Viewing a patron’s history of fines paid](http://documentation.iii.com/sierrahelp/Default.htm#sgcir_fine_viewhistory.html)

# [Using circulation notices](http://documentation.iii.com/sierrahelp/Default.htm#sgcir_notices.html)

* [Specifying how notices are prepared and sent](http://documentation.iii.com/sierrahelp/Default.htm#sgcir_notices_mode_setup.html)
* [Creating circulation notices](http://documentation.iii.com/sierrahelp/Default.htm#sgcir_notices_creatingoverview.html)
  + Saving and scheduling notice jobs (optional feature)
  + [Managing auto notices](https://documentation.iii.com/sierrahelp/Default.php#sgcir/sgcir_notices_autonotices_info.html)
* [Sending prepared notices to patrons](http://documentation.iii.com/sierrahelp/Content/sgcir_notices_send.html)
* [Viewing notice history](http://documentation.iii.com/sierrahelp/Default.htm#sgcir_notices_history.html) (optional feature)
* [Printing circulation notices with print templates](http://documentation.iii.com/sierrahelp/Default.htm#sgcir_notices_print_pt.html)
* [Using SMS alerts](http://documentation.iii.com/sierrahelp/Default.htm#sgcir_sms_notices.html) (optional product)

# Additional circulation-related functions/products

* [Counting usage](http://documentation.iii.com/sierrahelp/Default.htm#sgcir_count_countingusage.html)
* [Viewing the recent circulation history of an item](http://documentation.iii.com/sierrahelp/Default.htm#sgcir_recent_circ_hist.html) (optional feature, requires director/coordinator approval, records last five checkouts)
* [Reporting delinquent patrons to a collection agency](http://documentation.iii.com/sierrahelp/Default.htm#sgcir_collect.html) (optional product)
* [Creating the homebound patron report](http://documentation.iii.com/sierrahelp/Default.htm#sgcir_home_createhomereport.html) (optional product)
* [Floating](https://documentation.iii.com/sierrahelp/Default.php#sgcir/sgcir_floating_collection.html)/[Mobile](https://documentation.iii.com/sierrahelp/Default.php#sgcir/sgcir_mobile_collect.html)/[Deposit](https://documentation.iii.com/sierrahelp/Default.php#sgcir/sgcir_deposit_collect.html) collections/[Held item delivery](https://documentation.iii.com/sierrahelp/Default.php#sgcir/sgcir_shipshelf.html) (optional products)

* [Mobile Worklist](https://documentation.iii.com/sierrahelp/Default.htm" \l "smobile/smobile_worklists.html) (optional product) (discussion)

* [Using offline circulation](https://documentation.iii.com/sierrahelp/Default.htm" \l "sgcir/sgcir_offlne_offlinecirc.html) [Using offline circulation](https://documentation.iii.com/sierrahelp/Default.htm" \l "sgcir/sgcir_offlne_offlinecirc.html)

* + [Download and install Sierra Offline Circulation](https://iii.rightanswers.com/portal/app/portlets/results/viewsolution.jsp?solutionid=180201164817671&page=1&position=5) (Supportal)

# Managing Circulation

* [Viewing system-generated review files](http://documentation.iii.com/sierrahelp/Default.htm#sgil_lists_system_generated.html) and [Copying a review file](http://documentation.iii.com/sierrahelp/Default.htm#sgil_lists_copy_review_file.html) (On Search file)
* [Globally purge charges](http://documentation.iii.com/sierrahelp/Default.htm#sgcir_globally_purge.html)
* [Viewing all fines paid](http://documentation.iii.com/sierrahelp/Default.htm#sgcir_fine_allfinespaid.html) (and exporting and clearing the file)
* [Delete records](http://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_maint_delete_records_function.html) (batch deletion of records)

## In Administration App or Admin Corner

* [Check missing items](http://documentation.iii.com/sierrahelp/Default.htm#sadmin_admin_corner_onsearchfile.html) and clear the On-search file (in Admin Corner)
* [Rapid updating for YTDCIRC](http://documentation.iii.com/sierrahelp/Default.htm#sadmin_admin_corner_rapidupdatYTDLYR.html) (Year to date and Last year circ fields) (discussion) (in Admin Corner)
* [Administering system files](http://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_backend_sysfiles.html) (Viewing circulation overrides) (in Administration App)
* [Review of Circulation System Options](http://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_options_circ.html) (in Admin Corner)

## Circulation reports and statistics

* [Using the Web Management Reports web browser interface](http://documentation.iii.com/sierrahelp/Default.htm#sgwr_browser.html)   
  **Reports | Web Management Reports** (or <http://yourcatalogIP/manage>)
* [Using the Web Management Reports spreadsheet interface](http://documentation.iii.com/sierrahelp/Default.htm#sgwr/sgwr_spreadsheet.html)   
  **Reports | Circulation Activity Reports** (or<http://yourcatalogIP/iii/webrpt>)
* [Using Statistics](http://documentation.iii.com/sierrahelp/Default.htm#sgstat_main_page.html) function
* [Creating lists (review files)](https://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_lists.html)
* [Decision Center](http://csdirect.iii.com/manual_dc/Default.htm) (optional product) (discussion)

# Preparing to go live with circulation (discussion)

* Preparation for going live
  + [Pre-migration checklist](https://documentation.iii.com/sierraimp/Default.php#cm_premigration_checklist.htm) (Sierra Implementation Manual)
* Checkout procedures during circulation migration
  + [Using offline circulation](https://documentation.iii.com/sierrahelp/Default.htm#sgcir/sgcir_offlne_offlinecirc.html)

# Supporting documentation

* [Sierra WebHelp](http://documentation.iii.com/sierrahelp/Default.htm)– Browse tab

* [Sierra LibGuide](https://innovative.libguides.com/sierra/circulation)
  + [Circulation checklist](https://innovative.libguides.com/sierra/circulation) [Circulation checklist](https://iii365.sharepoint.com/:w:/s/ITLCresources/ES_ui1m1sEFHjoMhwFSHDuQBjuMYSGMBH0-17AnlxJjvtA)
* [Supportal](https://iii.rightanswers.com)

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