

Sierra Circulation - 2 days training

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 segments in this agenda are web hyperlinks. Please click on the link to be directed to the appropriate page in Sierra WebHelp.

This class schedule is flexible and subject to change.

Introduction

- Introduction of trainer and trainees
- [Logging into the Sierra Desktop Application](#)
- Brief review of Circulation parameters
- [Checkout criteria flowchart](#) (CSDirect – login required)

Record types created in circulation

- Record data fields for record types normally used in circulation
 - [Bibliographic records](#)
 - [Item records](#)
 - [Patron records](#)
 - [Course records](#)
 - [Item-on-the-fly records](#)

Managing patron records

- [Creating a patron record](#)
- [Editing records in Sierra](#)
- [Linking patron records](#)
- [Managing lost library cards](#)
- [Merging duplicate patron records](#)
- [Delete records \(patron\)](#)

Using Circulation

- [Checking out items](#)
 - [Possible blocks when checking out an item](#)
 - [Checking out items that have special conditions](#)
 - [Printing date due slips](#)
 - [Overriding the calculated due date](#)
 - Adding messages in patron records
 - [Adding messages at checkout \(item\)](#)
- Viewing checked out items
- [Creating item records on-the-fly](#)

Circulation Training Agenda

Placing holds

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

Renewing items

- Renewing items from a patron's record
- Renewing items with title or volume holds
- Changing due dates for renewed items
- View renewed item

Claiming items returned

- Possible messages (claiming items returned)

Marking items as lost

Checking in items

- Checking in items that have special conditions
- Checking in items – patron present
- Checking in items – no patron (patron not present)
- Backdating checked-in items
- Managing in transit items
- Viewing checked in item

Managing holds

- Holds and bookings display
- Viewing outstanding holds
- Modifying hold information
- Transferring holds from one queue to another
- Re-sequencing a hold queue
- Transferring paged items
- Cancelling holds
- Viewing 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

Circulation Training Agenda

- [Collecting money for fines](#)
- [Reinstating fines](#)
- [Viewing a patron's history of fines paid](#)

Additional circulation-related functions/products

- [Counting usage](#)
- [Viewing the recent circulation history of an item](#)
- [Data exchange: importing and exporting records](#) (Patron Record Loading) (discussion)
- [Sierra offline circulation](#) (discussion)

Managing Circulation

- [Notices](#)
 - [Specifying how notices are prepared and sent](#)
 - [Creating circulation notices](#)
 - [Sending prepared notices to patrons](#)
 - [Viewing notice history](#)
 - [Printing circulation notices with print templates](#)
 - [Using SMS alerts](#) (discussion)
- [Other functionality](#)
 - [Globally purge charges](#) (discussion)
 - [Viewing all fines paid](#) (and exporting and clearing the file)
 - [Managing templates for new records](#)

Reports and create lists (Discussion and demo as time permits)

- [Using statistics](#)
- [Using the Web Management Reports web browser interface](#)
url is: <http://yourcatalogIP/manage>)
- [Using the Web Management Reports spreadsheet interface](#) (access at: url is: <http://yourcatalogIP/iii/webrpt>)
- [Creating lists](#)
- [Decision Center](#)

Supporting documentation

- [Sierra WebHelp](#)– Browse tab
- [Sierra Knowledge Base](#)

Please feel free to evaluate your training experience by filling out the [Training Survey](#)

This publication is supplied for the exclusive use of customers of Innovative Interfaces with the understanding that it shall not be shown or distributed to anyone outside of the customer's organization without the prior written permission of Innovative Interfaces. This publication may be copied only if the copies are for the exclusive use of staff members of libraries that have purchased the Innovative system.
© 2017, Innovative Interfaces, Inc.