Pre-Conference – Circulation A to Z-enhancements with latest upgrade

Mike McClellan

-Recent Enhancement Review

-Optional Circulation Features to Consider

Expired Card Warning:

You can have Sierra display a pop-up at checkout ___ number of days before a patrons record expired.

Our longest loan period is 28 days so we would set this pop-up to display 29 days before the patrons record expires. This eliminates you having to change the due date at checkout because Sierra is using the patron expiration date as the due date instead of 28 days.

Damage Item option at '"ITEMS CHECKED OUT" screen.

Patron Record>checked out items>there will be a new tab called "Marked Damaged Items"

From here you can do one of two things:

1. Mark a checked out item as damaged-not patron fault-no charge. (The item stays checked out to the patron.
2. Mark a checked out item as damaged and charge the patron using "add charge " option that we use now for adding a fee to the patron record except this automatically fills in the items title & barcode in the Reason field and the price in the amount field (which can then be edited). The item stays checked out to the patron.

Payment Note

Patron record>Fines>Highlight the item with a fine to be adjusted>right click on it>click on "adjust">change the amount and now a "NOTE OPTION" will appear in which you can explain the adjustment such a "forgot to backdate" for closed date at check in or you felt sorry for the patron and cut their fine in half. We have always been able to change the amount but no place to explain why.

There will now be a running count in the bottom corner of the check in screen saying how many items have been checked in.

Auto-Fill for birth date is going away.

Optional Innovative must enable:

Can extend due dates of a group of items using a review file & rapid update. Does not go through Circ Stats and does not count as a renewal. You can use this for unexpected closed dates.

We can have "Borrowed At" printed on Bills.

May have the option to send notices from the lending library rather than the owning library!

You can "Streamline" checkout by eliminating the pop-up we currently see at checkout when the item you are checking out is still checked out to another patron. Sierra will automatically check the item in and waive any fine.

I'm not sure about this one for our library. We currently go into the patron record the item is checked out to and print a list of items they currently have checked out. We then check our shelves to make sure there are not others that missed getting checked in. If we don't see the pop-up we won't know to check the patron's record.

Annual Fee's

If turned on-Sierra will automatically assess a fee on the patrons expiration date. Sierra compares the expired patron type to determine if a fee should be charged. It does not update the expiration date.

Un Claimed Holds Fee

Set by patron type

A brief message appears in the fine field.

Optional –

Can display the patrons email address & phone number on the Hold Shelf Pop-Up on the screen and the hold slip for libraries that want to call the patron immedietely.