

Sierra for Circulation Admin

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Marmot Library Network

What are the parameter tables?

- Tables such as Loan Rules, Loan Rule Determiner, Patron Blocks, Text of Circulation, & Hold Pickup Locations
- The backbone to Sierra's logical circulation processes
- Fully customizable to fit different situations
- All tables work together to checkout items to a patron

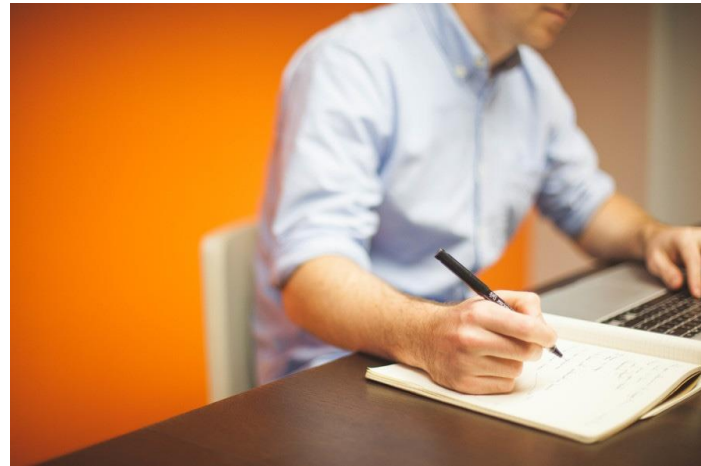


Marmot's Role

- Maintain and support all Sierra parameter tables
 - Make changes as requested
 - Master knowledge of parameter tables to make educated changes and suggestions
 - Maintain documentation of tables
- Empower library staff to view parameter tables
 - Staff get a better understanding of how the tables work
 - Staff can send parameter request changes to Marmot more efficiently
 - Proactive parameter decisions versus reactive

What will you walk away with?

- Knowledge of parameter tables
- Knowledge of relationships between parameter tables
- Knowledge to get view access to parameter tables
- Ability to make better decisions about your parameters



Loan Rules

- Main parameter used for circulation
- Each row represents a new rule
- Each column represents the elements of the rule
- Each loan rule has many elements including;
 - Checkout period / Code
 - Holdable (Y/N)
 - Renewable (Y/N)
 - Fines per day/hour
 - Text applied for the different notices
- View more details by double-clicking

	Name	Code	Normal Loan Pe..	Holdable	Bookable	Home Pickup	Shippable
1	non circulat...	N	1	n	n	n	n
2	mvs non circ	N	1	n	n	n	n
3	mvs 30d w/...	R	30	y	n	n	n
4	mvs 30d no...	R	30	y	n	n	n
5	EP 21/d .20...	R	21	n	n	n	n
6	ep 56d 0r H...	R	56	y	n	n	n
7	mvs 14d w/...	R	14	y	n	n	n
8	mvs 14d no...	R	14	y	n	n	n
9	mvs 1d w/fi...	R	1	n	n	n	n
10	mvs 1d no f...	R	1	n	n	n	n
11	msc 21d	R	21	y	n	n	n
12	msc 21d no...	R	21	y	n	n	n
13	msc 2h no f...	K	2	y	n	n	n
14	msc 2h w/fi...	K	2	n	n	n	n
15	grc 7d \$1/d...	R	7	n	n	n	n
16	msc 42d no...	R	42	y	n	n	n
17	msc 7d no f...	R	7	y	n	n	n
18	msc 365d n...	R	365	y	n	n	n
19	msc sem no...	A	133	y	n	n	n
20	mpc 14d .1...	R	14	y	n	n	n
21	mpc 14d .1...	R	14	n	n	n	n
22	mpc 7d .10 ...	R	7	n	n	n	n
23	MLD Holdab...	R	0	y	n	n	n
24	ep 7/d 10/...	R	7	n	n	n	n
25	mpc 28d	R	28	y	n	n	n
26	Not In Use	N	7	y	n	n	n
27	Not In Use	R	1	y	n	n	n
28	Not In Use	R	21	y	n	n	n

Loan Rules

TIPS

- Once a loan rule is added it should never be deleted
 - Loan rules are referenced based on their number
 - Deleting a rule causes all rules below it to shift number
 - All references to those numbers will be one number off
- Name rules with some information about the rule itself
 - Checkout period
 - Holdablility
 - Fines

Name	non_circulating
Code	N
Normal Loan Period	1
Holdable	<input type="radio"/> yes <input checked="" type="radio"/> no
Bookable	<input type="radio"/> yes <input checked="" type="radio"/> no
Home Pickup	<input type="radio"/> yes <input checked="" type="radio"/> no
Shippable	<input type="radio"/> yes <input checked="" type="radio"/> no
Ship Time	0
Time Remaining B4 Renew	0
First Renewal Period	0
Additional Renewal Period	0
Max Number Of Renewals	0
Minimum Use	0
Eligib To Recall	0
Time Return Recall	0
Time To Pickup	8
Max Number Of Odues	3
Time First Odue	3
Time Second Odue	10
Time Third Odue	14
Time Fourth Odue	0
Time Fifth Odue	0
Time Sixth Odue	0
Text First Odue	1
Text Second Odue	1
Text Third Odue	2
Text Fourth Odue	0
Text Fifth Odue	0
Odue Penalty	0
Text First OdueR	10

Loan Rules

TABLES REFERENCED

- Text of Circulation

Name	non_circulating
Code	N
Normal Loan Period	1
Holdable	<input type="radio"/> yes <input checked="" type="radio"/> no
Bookable	<input type="radio"/> yes <input checked="" type="radio"/> no
Home Pickup	<input type="radio"/> yes <input checked="" type="radio"/> no
Shippable	<input type="radio"/> yes <input checked="" type="radio"/> no
Ship Time	0
Time Remaining B4 Renew	0
First Renewal Period	0
Additional Renewal Period	0
Max Number Of Renewals	0
Minimum Use	0
Eligib To Recall	0
Time Return Recall	0
Time To Pickup	8
Max Number Of Odues	3
Time First Odue	3
Time Second Odue	10
Time Third Odue	14
Time Fourth Odue	0
Time Fifth Odue	0
Time Sixth Odue	0
Text First Odue	1
Text Second Odue	1
Text Third Odue	2
Text Fourth Odue	0
Text Fifth Odue	0
Odue Penalty	0
Text First OdueR	10
Text Second OdueR	10
Text Third OdueR	10
Text Fourth OdueR	0
Text Fifth OdueR	0
Courtesy Notice Text Number	0
Number Of Days Before Odue	0
Time 1ST Odue Recall	0
Text Recall Notice	10
Text Pickup Notice	6
Text Cancel Pickup	8
Grace Period For Fines	0
Number Of D/HR 1st F Per	0
Amount Of Fine 1st F Per	\$0.00
Number Of D/HR 2nd F Per	0
Amount Of Fine 2ND F Per	\$0.00
Limit Fine To Price	<input type="radio"/> yes <input checked="" type="radio"/> no
Default Item Cost	\$0.00
Replace Process Fee	\$0.00
Replace Bill Service Charge	\$0.00
Rental Fee	\$0.00
Fine Incr If Recall	\$0.00
Msg Fines	12
Msg Bill	2
Msg Adjustment	2
Rental Circtext	0
Penalty Incr If Recall	0

Loan Rule Determiner

- Uses a combination of location, p-type and i-type to assign a loan rule
- Elements of the Loan Rule Determiner
 - Location (Sierra login)
 - Patron Type(s)
 - Item Type(s)
 - Age Range
 - Rule Number (Loan Rule Number)
 - Active
- Read from the bottom to the top
- Broken down by library
- Currently 1009 entries

	Location	Patron Type	Item Type	Age Range	Rule Number	Active
1	?????	999	999		1	Y
2	ad*	999	999		1	Y
3	ad*	81	999		203	Y
4	ad*	82	999		204	Y
5	ad*	82,83	78		199	Y
6	ad*	83	999		202	Y
7	ad*	83	90		200	Y
8	as*	999	999		286	Y
9	as*	999	205		201	Y
10	as*	999	45,48,65,67,7...		1	Y
11	as*	156-158,160	-16,19-25,27...		1	Y
12	as*	11,10,12,14,1...	999		1	Y
13	as*	60	999		112	Y
14	as*	56,58	999		109	Y
15	as*	59	999		111	Y
16	as*	57	999		110	Y
17	as*	56,57,58	44		411	Y
18	as*	56,57,58	65		109	Y
19	as*	56,58	255		109	Y
20	as*	57	205		201	Y
21	as*	57	90,252,255		110	Y
22	as*	59	48		111	Y
23	as*	60	90,252		109	Y
24	as*	56,58	0		109	Y
25	as*	59	90,252		111	Y
26	as*	56,58	90,252		278	Y
27	as*	56,58	72		109	Y
28	as*	57	72		110	Y
29	as*	59	72		111	Y
30	as*	56,57	135,214,231		278	Y

Loan Rule Determiner

TABLES REFERENCED

- Branches (Location codes)
- Locations served
- P-types
- I-types
- Loan Rules

Location	?????
Patron Type	999
Item Type	999
Age Range	
Rule Number	1
Active	<input checked="" type="radio"/> yes <input type="radio"/> no

Patron Blocks

- Table of configurable “events” that dictate when a patron will be blocked from checkout
- Elements of Patron Blocks
 - P-type
 - Patron Agency
 - Patron Exp Date
 - Max Owed
 - Highest Level Odue
 - Max Items
 - Max Holds
 - Max Item Categories

	Patron Type	Patron Agency	Patron Exp. Date	Max Owed	Highest Level Odu	Max Items	Max Holds
1	1	999	y	\$25.00	2	25	50
2	3	9	n	\$10.00	4	5	0
3	4	9	n	\$10.00	4	3	0
4	5	9	n	\$999,999.00	9	999	300
5	6	9	n	\$15.00	4	25	25
6	7	9	n	\$15.00	4	25	25
7	8	9	n	\$15.00	4	25	25
8	50	150	y	\$0.00	0	0	0
9	56	4	y	\$15.00	2	150	300
10	57	4	y	\$15.00	2	150	300
11	58	4	y	\$5.00	1	15	30
12	59	4	n	\$1,000,000.00	8	999	999
13	0	89	y	\$1,000,000.00	9	999	999
14	71	89	y	\$1,000.00	9	99	40
15	72	89	y	\$1,000,000.00	9	99	40
16	74	89	y	\$100.00	9	99	40
17	73	89	y	\$9,977.00	9	2100	40
18	75	89	y	\$100.00	9	99	40
19	35	100	y	\$9.99	1	2	2
20	43	25	n	\$9,999,999.99	8	99	40
21	45	25	y	\$5.00	3	99	45
22	42	25	n	\$9,999,999.99	8	99	40
23	41	25	y	\$9,999,999.99	8	99	40
24	44	25	y	\$9,999,999.99	8	99	40
25	96	100	y	\$1.00	1	2	2
26	3	34	y	\$25.00	3	25	25
27	11	34	y	\$20.00	3	2	2
28	5	34	y	\$250.00	3	99	300
29	12	34	y	\$9,999,999.99	9	997	300
30	16	34	y	\$9,999,999.99	9	200	300
31	10	34	n	\$9,999,999.99	3	500	300
32	17	34	y	\$25.00	3	25	0
33	14	34	v	\$25.00	3	5	5

Patron Blocks

- Table of configurable “events” that dictate when a patron will be blocked from checkout
- Elements of Patron Blocks
 - P-type
 - Patron Agency
 - Patron Exp Date
 - Max Owed
 - Highest Level Odue
 - Max Items
 - Max Holds
 - Max Item Categories

Patron Type	1
Patron Agency	999
Patron Exp. Date	y
Max Owed	\$25.00
Highest Level Odues	2
Max Items	25
Max Holds	50
Max ILL(at one time)	0
Max ILL(per interval)	0
Max ItemA	4
Max ItemB	3
Max ItemC	6
Max ItemD	2
Max Programs	0
Highest Number Odue Points	0
Block Days	0

Patron Blocks

TABLES REFERENCED

- P-types
- Agency
- Item limiter categories
A,B,C, & D

Patron Type	1
Patron Agency	999
Patron Exp. Date	y
Max Owed	\$25.00
Highest Level Odues	2
Max Items	25
Max Holds	50
Max ILL(at one time)	0
Max ILL(per interval)	0
Max ItemA	4
Max ItemB	3
Max ItemC	6
Max ItemD	2
Max Programs	0
Highest Number Odue Points	0
Block Days	0

Text of Circulation

- Text that will appear in notices such as;
 - Overdues
 - Hold Pickups
 - Bills
 - Courtesy
- Referenced by number in Loan Rules
- Cannot delete for the same reason as loan rules
- Can be in English and Spanish
- Can be by library Specific

	Notice Type
1	Overdue--with fines
2	Overdue--no fines
3	Lost Book--with fine
4	Lost Book--Fines
5	Hold pickup--branches
6	Hold pickup, no bran
7	statement
8	drop hold 2 checkbox
9	Lost Book
10	Overdue recall--fine
11	Overdue recall, nofi
12	Fines
13	Bud Overdue
14	Bud Lost Book
15	Basalt 1st Overdue
16	Basalt 2nd Overdue
17	CMG Ref Overdue
18	ASU Bill
19	drop hold lost
20	drop hold - too many
21	Paging
22	SSSD 1st Overdue
23	drop hold - have out
24	drop hold - have hld
25	MCPLD Final Notice
26	Homeroom overdue lis
27	GRC 1st notice fines
28	GRC 2nd notice fines
29	GRC final notice
30	GRC ref 1st overdue

Edit Mode

Text of Circulation

- Text that will appear in notices such as;
 - Overdues
 - Hold Pickups
 - Bills
 - Courtesy
- Referenced by number in Loan Rules
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- Can be in English and Spanish
- Can be by library Specific

The screenshot shows a web-based interface for creating a notice. It features two input fields for the notice type, one for English and one for Spanish, both containing the text "Overdue--with fines". Below these are two large text areas for the notice content. The English text area contains the following text: "Overdue Notice
Our records indicate that the following items have not been returned. You may clear your record by returning the items and paying any fines or by paying for replacement of lost items plus applicable fees. Please call your home library if you have any questions about this notice." The Spanish text area contains the same text in Spanish: "Overdue Notice
Our records indicate that the following items have not been returned. You may clear your record by returning the items and paying any fines or by paying for replacement of lost items plus applicable fees. Please call your home library if you have any questions about this notice." At the bottom of the interface are three buttons: "OK", "Cancel", and "Print".

Hold Pickup Locations

- Allows grouping of locations into one pickup location
- Defines labels for pickup locations
- Houses the paging priority tables

	Display Name	List of Locations	Agency
1	Adams State Univ Circ Desk C...	as , asar , asco , ascp , asdv , ...	4
2	Basalt Reg Lib Dist C582	ba , baau , babck , babo , babo...	5
3	Buena Vista Public Library C844	bv , bvabb , bvabv , bvabf , bva...	166
4	Bud Werner Mem. Lib. C722	ssb , ssbac , ssbag , ssbav , ssb...	78
5	Colorado Christian Univ C902	cc , ccarc , ccbk , ccbov , cccd , ...	9
6	CMC Steamboat Springs C726	cms , cmsbl , cmse2 , cmsgv , c...	138
7	CMC Leadville C896	cml , cmlma , cmlmc , cmlmd , c...	138
8	CMC Quigley C588	cmg , cmgc , cmgcr , cmgd , cm...	138
9	CMC Dillon C712	cmd	138
10	CMC Edwards C714	cmve	138
11	CMC Rifle C586	cmr	138
12	Englewood Public Library C130	ep , epb , epbb , epblu , epcas...	150
13	ES Bishop Elementary C130	esb , esbav , esbb , esbbs , esb...	158
14	ES Charles Hay Elementary C1...	esc , escav , escb , escbs , escd , ...	158
15	ES High School C130	esh , eshav , eshb , eshbs , esh...	158
16	ES Clayton Elementary C130	esl , eslav , eslb , eslbs , esld , ...	158
17	ES Middle School C130	esm , esmav , esmb , esmbs , e...	158
18	ES Cherrelyn Elementary C130	esr , esmf , esrav , esrb , esrbs...	158
19	EVL Avon C728	eva , evabd , evabk , evabl , eva...	10
20	EVL Eagle C730	eve , evebd , evebk , evebl , eve...	10
21	EVL Gypsum C720	evg , evgbd , evgbk , evgbl , evg...	10
22	Fort Lewis College	fl , flbhh , fic , ficas , flcat , flica...	170
23	Garfield Carbondale Branch C5...	gcc , gcc , gccfi , gccil , gccju , g...	115
24	Garfield Glenwood Branch C590	gcg , gcgc , gcgfi , gcgil , gcgju , ...	115
25	Garfield New Castle Branch C5...	gcn , gcnc , gcnfi , gcnil , gcnju , ...	115
26	Garfield Parachute Branch C516	gcp , gcpc , gcpfi , gcpil , gcpju , ...	115
27	Garfield Rifle Branch C570	gcr , gcrc , gcrfi , gcril , gcrju , gc...	115
28	Garfield Silt Branch C578	gcs , gcsac , gcsc , gcsfi , gcsil , ...	115
29	Grand Co Admin Office C704	gra , graan , graap , graaq , gra...	110
30	Grand Co luniner C702	ari , ariac , ariac , ariaf , arial , ar...	110

Hold Pickup Locations

Paging Priority

- Allows you to choose which libraries get paged first for each pickup location
- Set as numbers from 0-999
 - 0 denies paging
 - Lower numbers paged first
 - If numbers are the same then paging is randomized

Display Name	Paging Priority
Basalt Reg Lib Dist C582	800
Buena Vista Public Library C844	999
Bud Werner Mem. Lib. C722	800
Colorado Christian Univ C902	999
CMC Steamboat Springs C726	999
CMC Leadville C896	999
CMC Quigley C588	999
CMC Dillon C712	999
CMC Edwards C714	999
CMC Rifle C586	999
Englewood Public Library C130	999
ES Fisher Elementary C130	000

Hold Pickup Locations

Display Name (English)

Display Name (Spanish)

List of Locations

Location
as
asar
asco
ascp
asdv
asea
aseq

Paging Priority

Display Name	Paging Priority
Basalt Reg Lib Dist C582	800
Buena Vista Public Library C844	999
Bud Werner Mem. Lib. C722	800
Colorado Christian Univ C902	999
CMC Steamboat Springs C726	999
CMC Leadville C896	999
CMC Quigley C588	999
CMC Dillon C712	999
CMC Edwards C714	999
CMC Rifle C586	999
Englewood Public Library C130	999
EE Pickett Elementary C130	999

Agency

Questions?

