

# Circulation Rules: Tune-Up

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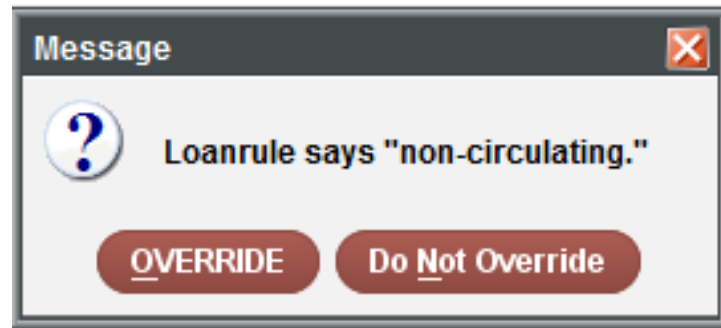
WRIGHT STATE UNIVERSITY



# Signs of Trouble

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Circulation staff see this message:



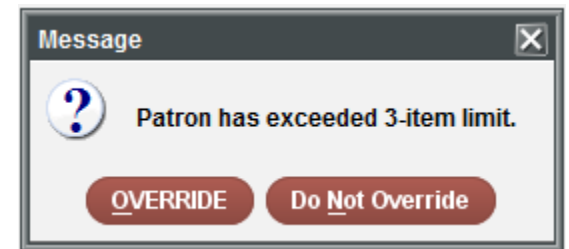
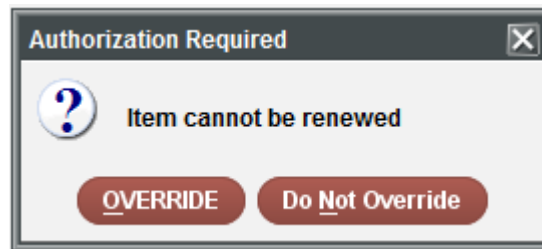
Circulation staff frequently use this function:

**Change Due Date**

# Signs of Trouble

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Circulation staff frequently see other OVERRIDE messages:



# Pieces of the Puzzle

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## 1. Loan Rules

- Defines the parameters that Sierra uses for circulating items to patrons.
- Each loan rule consists of a set of variables that govern many aspects of circulation, including checkouts, renewals, holds, notices, fines, and bills

**Manual:** Sierra Reference > Configuration Files and Tables > Loan Rules Table

# Pieces of the Puzzle

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## 2. Loan Rule Determiner Table

- Brings together the three variables to assign the appropriate loan rule
  - Item Location
  - Patron Type
  - Item Type

**Manual:** Sierra Reference > Configuration Files and Tables > Loan Rule Determiner Table

# Pieces of the Puzzle

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Used together to determine loan rule of an item:

## 3. Patron Types

- Also used to automatically block patrons (Patron Blocks table) from performing some transactions.
- Found in the PTYPE field of patron records

## 4. Location Codes

- Also tie into multiple other tables and functions
- Found in the LOCATION field of item records

## 5. Item Types

- Also appear as categories in circulation reports.
- Found in the ITYPE field of item records

**Manual:** Sierra Reference > Configuration Files and Tables > Patron Type Table

**Manual:** Sierra Reference > Configuration Files and Tables > Branches Table

**Manual:** Sierra Reference > Configuration Files and Tables > Item Types Table

# Pieces of the Puzzle

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## 6. Patron Blocks Table

- Specifies the conditions which block patrons from performing certain types of circulation transactions.
- The system compares the value in the patron's P TYPE field to the blocking conditions specified for this patron type in the Patron Blocks table.

**Manual:** Sierra Reference > Configuration Files and Tables > Patron Blocks Table





# Look at the Data #1

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Compare your collection to your circulation parameters:

- Are your parameters inclusive? Are all of the item types in your collection included?

# Steps

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1. Create a list of all items in the library/collection
  - (Function=Create Lists)
2. Run a statistical cross-tab report for ITYPE and LOCATION fields
  - (Function=Statistics)
3. View the report by Record Count
4. Export to Excel
5. Compare the Stats report to the Loan Rule Determiner table to see if the ITYPES and LOCATION appropriately matched
  - Sierra > Admin Menu > Parameters > Circulation > Loan Rule Determiner

| Location | Patron Type           | Item Type                                   |
|----------|-----------------------|---|
| 11001    | 1-9,17,20,22,24,26-29 | 000-003,010, <b>014,020-115</b>             |
| 11002    | 1-9,17,20,22,24,26-29 | 10  |
| 11003    | 1-9,17,20,22,24,26-29 | 000-003,010,014,017,020-059, <b>061-115</b> |
| 11003    | 1,2,4,17,26           | 60  |
| 11007    | 1-9,17,20,22,24,26-29 | 10  |

Statistical Report – the library currently has rules to allow circulation of these items

Loan Rule Determiner Table – the library currently has no items in these locations using these ITYPES

| Code    | 0 Book | 2 Journal | 3 Reference | 10 Local book | 17 Audio CD | 18 Reserves | 20 VHS | 23 Video Disc | 52 Model | 60 Equipment |
|---------|--------|-----------|-------------|---------------|-------------|-------------|--------|---------------|----------|--------------|
| 11001   | 3746   | 0         | 0           | 8             | 0           | 0           | 0      | 0             | 0        | 0            |
| 11002   | 0      | 0         | 0           | 144           | 0           | 0           | 0      | 0             | 0        | 0            |
| 11003   | 19     | 0         | 0           | 0             | 138         | 0           | 5      | 319           | 4        | 134          |
| 11004   | 0      | 0         | 0           | 0             | 0           | 27          | 0      | 0             | 0        | 0            |
| 11006   | 0      | 0         | 46          | 0             | 0           | 0           | 0      | 6             | 0        | 0            |
| 11007   | 0      | 0         | 0           | 146           | 0           | 0           | 0      | 0             | 0        | 0            |
| 11100   | 0      | 311       | 0           | 0             | 0           | 0           | 0      | 0             | 0        | 0            |
| Totals: | 3765   | 311       | 46          | 298           | 138         | 27          | 5      | 325           | 4        | 134          |



# Look at the Data #2

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Compare your Loan Rule Determiner table to your Patron Type, Item Type, and Location tables:

- Does your LRD include codes that are no longer in your system?

# Steps

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## 1. View the Loan Rule Determiner Table





- Sierra > Admin Menu > Parameters > Circulation > Loan Rule Determiner










## 2. View the Branches (Locations) Table

- Sierra > Admin Menu > Parameters > General > Branches

## 3. Look for any discrepancies: location codes present in one table that aren't present in the other

- These lines can be deleted from the Loan Rule Determiner Table

| Loan Rule Determiner  |          |                   |             |
|---|----------|-------------------|-------------|
| File Tools  |          |                   |             |
|     |          |                   |             |
| Append  | Save     | Delete            | Copy        |
|   | Location | Patron Type       | Item Type   |
| 46  | 04001    | 2-4,6,7,27-29     | 018,060     |
| 47  | 04002    | 2-4,6,7,27-29     | 018,060     |
| 48  | 04003    | 2-4,6,7,27-29     | 018,060     |
| 49  | 04004    | 2-4,6,7,27-29     | 018,060     |
| 50  | 04005    | 2-4,6-8,10,27-29  | 000         |
| 51  | 04010    | 200-205,212-21... | 000,035,038 |
| 52  | 04010    | 230-233           | 000,035,038 |
| 53  | 04010    | 1-8,10-12,20-33   | 000,035,038 |
| 54  | 04011    | 1-7,12,20-29      | 000         |
| 55  | 04013    | 1-8,10,12,20-33   | 000,023,024 |
| 56  | 04013    | 200-205,212-21... | 000,151,152 |
| 57  | 04013    | 230-233           | 000,151,152 |
| 58  | 04016    | 2-4,6,7,27-29     | 000,034,036 |
| 59  | 04017    | 1-8,10,12,20-33   | 10          |
| 60  | 04018    | 1-8,12,20-33      | 000         |
| 61  | 04018    | 10                | 000         |
| 62  | 04019    | 1-8,10-12,20-29   | 002         |
| 63  | 04020    | 2-4,6-8,10,27-29  | 009         |
| 64  | 04025    | 2-4,6,7,27        | 011         |
| 65  | 04026    | 2-4,6,7           | 011         |
| 66  | 04028    | 1-8,10-12,20-33   | 000,038,152 |
| 67  | 04029    | 2-4,6-8,27-29     | 009,010,017 |
| 68  | 04029    | 10                | 009,010,017 |
| 69  | 04030    | 1-8,10,12,20-33   | 000,017,020 |
| 70  | 04030    | 200-205,212-21... | 000,017,020 |
| 71  | 04030    | 230-233           | 000,017,020 |

| Branches  |        |                               |
|---|--------|-------------------------------|
| File Tools  |        |                               |
|          |        |                               |
| Append  | Save   | Delete                        |
| Copy  | Insert | Edit                          |
| View  | Move   | Print                         |
|   | Code   | Branch Name                   |
| 53  | 04000  | Educational ResCTR            |
| 54  | 04001  | Edu. Res. Ctr. RSV            |
| 55  | 04002  | Edu. Res. Ctr. RSV            |
| 56  | 04003  | Edu. Res. Ctr. RSV            |
| 57  | 04004  | Edu. Res. Ctr. RSV            |
| 58  | 04005  | EducResCtr Education File     |
| 59  | 04010  | EducResCtr Holocaust Print    |
| 60  | 04011  | EducResCtr Holocaust EF       |
| 61  | 04012  | EduResCtr Holocaust Reference |
| 62  | 04013  | EducResCtr Holocaust Nonprint |
| 63  | 04016  | EducResCtr Gen NP softw       |
| 64  | 04017  | EduResCtr Prof Books Local    |
| 65  | 04018  | EducResCtr Prof Books         |
| 66  | 04019  | Educ Res Ctr Periodicals      |
| 67  | 04020  | EducResCtr Pic Files          |
| 68  | 04021  | EducResCtr Reference          |
| 69  | 04025  | EducResCtr - Restricted       |
| 70  | 04026  | EducResCtr - Restricted       |
| 71  | 04028  | EducResCtr Textbooks          |
| 72  | 04029  | EducResCtr Gen Nonprint Local |
| 73  | 04030  | EducResCtr Gen Nonprint       |
| 74  | 040ga  | Educational ResCtr            |
| 75  | 041ga  | ERC Reference                 |
| 76  | 042ga  | ERC Journals                  |
| 77  | 043ga  | ERC Media                     |

# Steps

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## 4. Next, look at the Patron Types Table

- Sierra > Admin Menu > Parameters > General > Patron Type






## 5. Look for any discrepancies: location codes present in one table that aren't present in the other

- These Patron Types can be deleted from the individual Loan Rule Determiner lines



| Patron Type   |   |
|---|---|
| File Tools  |   |
|  |  |
|  |  |
|  |   |
| Append  | Save  |
| Delete  | Copy  |
| Insert  |   |
|   | Label   |
| 0   | Other   |
| 1   | Physician   |
| 2   | Faculty - WSU   |
| 3   | PostGrad - WSU  |
| 4   | Resident - WSU  |
| 5   | Student - Hospital  |
| 6   | Student - WSU   |
| 7   | Interim Student - WSU   |
| 8   | Alumni - WSU  |
| 9   | Fac/Staff (no auth) - WSU   |
| 10  | Courtesy - ERC  |
| 11  | Pre-College - WSU   |
| 12  | Corporate - WSU   |
| 13  | Courtesy - CMC  |
| 14  | Courtesy - GS   |
| 15  | Courtesy - GVH  |
| 16  | Courtesy - KETT   |
| 17  | Courtesy - MVH  |
| 18  |   |
| 19  | Courtesy - VAMC   |
| 20  | Friends - WSU   |
| 21  | Interlibrary Loan   |
| 22  | Resident - GVH  |
| 23  | Millennium Staff - WSU  |
| 24  | Faculty - Kettering   |
| 25  | Other Affiliates - WSU  |
| 26  | Staff - Hospital  |
| 27  | Staff - WSU   |
| 28  | Emeritus Faculty - WSU  |
| 29  | Retiree - WSU   |
| 30  | Miami Jacobs  |
| 31  | United Theo   |
| 32  | AFIT/AFRL   |
| 33  | Recip Faculty - OCLC  |
| 34  |   |
| --  |   |
| Edit Mode   |   |

- Any PTYPEs between 1 and 33 (except 18) are valid
- Stretch the Patron Type column to view all entries
- Scan the Patron Type column of the Loan Rule Determiner Table to see if any codes besides 1-33 (except 18) are being used

| Loan Rule Determiner  |   |   |
|---|---|---|
| File Tools  |   |   |
|  |  |  |
|  |  |   |
| Append  | Save  | Delete  |
| Copy  | Insert  |   |
|   | Location  | Patron Type   |
| 13  | 01*   | 1-8,14,24,26-29   |
| 14  | 01001   | 1-8,14,24,26-29   |
| 15  | 01006   | 1-8,14,24,26-29   |
| 16  | 020*  | 1-8,16,24,26-29   |
| 17  | 020*  | 1-8,16,24,26-29   |
| 18  | 02100   | 24  |
| 19  | 02100   | 1-8,16,20,21,26-29  |
| 20  | 02101   | 1,4,5,24,26   |
| 21  | 02101   | 24  |
| 22  | 02101   | 24  |
| 23  | 02101   | 1,4,5,24,26   |
| 24  | 02102   | 5,24  |
| 25  | 02103   | 5,24  |
| 26  | 02103   | 5,24  |
| 27  | 02104   | 5,24  |
| 28  | 02105   | 5,24  |
| 29  | 02106   | 5,24  |
| 30  | 02107   | 1,4,5,16,24,26  |
| 31  | 02109   | 5,24,26   |

# Steps

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6. Next, look at the Item Types Table
  - Sierra > Admin Menu > Parameters > General > Item Type
7. Look for any discrepancies: item types present in one table but not in the other
  - These Item Types can be deleted from the individual Loan Rule Determiner lines

| Item Types   |                           |
|--|---------------------------|
| File Tools   |                           |
| Append          Save          Delete          Copy |                           |
| 0  | Book                      |
| 1  | Rarebook                  |
| 2  | Journal                   |
| 3  | Reference                 |
| 4  | Index                     |
| 5  | Journal - SWD Circulating |
| 6  | Map                       |
| 7  | Manuscript                |
| 8  | Score                     |
| 9  | Photo                     |
| 10   | Local book                |
| 11   | Test Files                |
| 12   | Miniscore                 |
| 13   | Overscore                 |
| 14   |                           |
| 15   | Collected Scores          |
| 16   |                           |
| 17   | Audio/Music CD            |
| 18   | Reserves                  |
| 19   | Non-Circulating           |
| 20   | VHS Cassette              |
| 21   | Media Guide               |
| 22   | UMAT Cassette             |
| 23   | Video Disc                |
| 24   | Audio Cassette            |
| 25   |                           |
| 26   | Record                    |
| 27   | Slides                    |
| 28   | Slidetape                 |
| 29   | Filmstrip                 |
| 30   | 16mm Film                 |
| 31   |                           |
| 32   | Transparency              |
| 33   | Microform                 |
| 34   | Computer Software         |
| 35   | Other AV                  |
| 36   | Computer Disc             |

- Stretch the Item Type column to view all entries
- Scan the Item Type column of the Loan Rule Determiner Table for any codes that are not present in your Item Types table

| Loan Rule Determiner   |          |              |   |    |
|--|----------|--------------|---|----|
| File Tools   |          |              |   |    |
| Append          Save          Delete          Copy          Insert          Edit          View          Move |          |              |   |    |
|  | Location | Patron Type  | Item Type   | Ag |
| 13   | 01*      | 1-8,14,2...  | 000,002,020,023,024,025,027,028,035,036,043-049,050 |    |
| 14   | 01001    | 1-8,14,2...  | 000,002,018,020,024,025,027,028,035,043-049,050     |    |
| 15   | 01006    | 1-8,14,2...  | 10  |    |
| 16   | 020*     | 1-8,16,2...  | 000,020-022,024-025,027-029,034                     |    |
| 17   | 020*     | 1-8,16,2...  | 002   |    |
| 18   | 02100    | 24           | 000,023,036   |    |
| 19   | 02100    | 1-8,16,2...  | 000,023,036   |    |
| 20   | 02101    | 1,4,5,24,... | 000,020,021,023,024,027,028,034-036                 |    |
| 21   | 02101    | 24           | 060,061,069,070                                     |    |
| 22   | 02101    | 24           | 100   |    |
| 23   | 02101    | 1,4,5,24,... | 017   |    |
| 24   | 02102    | 5,24         | 18  |    |
| 25   | 02103    | 5,24         | 018,060   |    |
| 26   | 02103    | 5,24         | 96  |    |
| 27   | 02104    | 5,24         | 018,060   |    |
| 28   | 02105    | 5,24         | 018   |    |
| 29   | 02106    | 5,24         | 018   |    |
| 30   | 02107    | 1,4,5,16,... | 002   |    |
| 31   | 02109    | 5,24,26      | 000   |    |
| 32   | 02109    | 5,24,26      | 023   |    |
| 33   | 02112    | 1,4,5,16,... | 024,034   |    |

# Look at the Data #3

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Assess your parameters for consistency:

- Can you easily convey your parameters into borrowing policies for patrons to understand?
- Do they make sense? (e.g. Do similar patrons have similar privileges? Are loan periods similar for the same types of items?)

# Steps

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1. Create a basic table for your general item types
2. View your Loan Rule Determiner Table
  - Sierra > Admin Menu > Parameters > Circulation > Loan Rule Determiner
3. Do your book collections all circulate for the same time frame?
4. Do your media collections all circulate for the same time frame?

|                      |                    |                      |
|----------------------|--------------------|----------------------|
|                      | Books              | Media                |
| Faculty/Staff        | 112 days (rule 60) | 14 days (rule 64/66) |
| Undergraduates       | 112 days (rule 61) | 14 days (rule 65/67) |
| Graduates            | 112 days (rule 62) | 14 days (rule 65/67) |
| Affiliated Libraries | 28 days (rule 63)  | 7 days (rule 68)     |

Loan Rule Determiner

File Tools

Append Save Delete Copy Insert Edit View Move Print Close Refresh

|     | Location | Patron Type         | Item Type | Age Range | Rule Number | Active |
|-----|----------|---------------------|-----------|-----------|-------------|--------|
| 142 | 06112    | 2,4,27-29           | 000-180   |           | 60          | Y      |
| 143 | 06112    | 3                   | 000-180   |           | 61          | Y      |
| 144 | 06112    | 6,7                 | 000-180   |           | 62          | Y      |
| 145 | 06112    | 1,5,8,11-17,19,...  | 000-180   |           | 63          | Y      |
| 146 | 06113    | 2,4,27-29           | 000-180   |           | 60          | Y      |
| 147 | 06113    | 3                   | 000-180   |           | 61          | Y      |
| 148 | 06113    | 6,7                 | 000-180   |           | 62          | Y      |
| 149 | 06113    | 1,5,8,11-17,19,...  | 000-180   |           | 63          | Y      |
| 150 | 06114    | 2,4,27-29           | 000-180   |           | 60          | Y      |
| 151 | 06114    | 3                   | 000-180   |           | 61          | Y      |
| 152 | 06114    | 6,7                 | 000-180   |           | 62          | Y      |
| 153 | 06114    | 1,5,8,11-17,19,...  | 000-180   |           | 63          | Y      |
| 154 | 06117    | 2,4,27-29           | 000-180   |           | 60          | Y      |
| 155 | 06117    | 3                   | 000-180   |           | 61          | Y      |
| 156 | 06117    | 6,7                 | 000-180   |           | 62          | Y      |
| 157 | 06117    | 1,5,8,11-17,19,...  | 000-180   |           | 63          | Y      |
| 158 | 06121    | 2,4,27-29           | 000-180   |           | 60          | Y      |
| 159 | 06121    | 3                   | 000-180   |           | 61          | Y      |
| 160 | 06121    | 6,7                 | 000-180   |           | 62          | Y      |
| 161 | 06121    | 1,5,8,11-17,19,...  | 000-180   |           | 63          | Y      |
| 162 | 06500    | 2,4,27-29           | 000-180   |           | 64          | Y      |
| 163 | 06500    | 3,6,7               | 000-180   |           | 65          | Y      |
| 164 | 06500    | 1,5,8,11-19,20,...  | 000-180   |           | 68          | Y      |
| 165 | 06500    | 200-205,212-21...   | 000-180   |           | 50          | Y      |
| 166 | 06500    | 230-233             | 000-180   |           | 30          | Y      |
| 167 | 06501    | 2,4,27-29           | 000-180   |           | 66          | Y      |
| 168 | 06501    | 3,6,7               | 000-180   |           | 67          | Y      |
| 169 | 06501    | 2,3,6,7,27          | 61        |           | 13          | Y      |
| 170 | 06501    | 2,3,4,6,7,20,27-... | 62        |           | 13          | Y      |
| 171 | 06502    | 2,4,27-29           | 000-180   |           | 64          | Y      |

Edit Mode

- Look for patron groupings—  
are similar loan rules  
applied for these groups for  
similar collections?

# Look at the Data #4

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## Examine your Patron Blocks Table:

- Do similar patrons have similar blocks?
- If the blocks are invoked frequently (staff see a lot of override prompts)—can they be adjusted to work better for your patrons?
- Sierra: Admin > Parameters > General > Patron Blocks

# Steps

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1. Examine the Patron Blocks table
  - Sierra > Admin > Parameters > General > Patron Blocks
2. Looks for patterns—or the lack of patterns
3. Consider the needs of each patron type



| Patron Type | Patron Exp. Date | Max Owed | Highest Level OD | Max Items | Max Holds | Max A (WSU) | Max B (Hosp) | Max C (Media) |
|-------------|------------------|----------|------------------|-----------|-----------|-------------|--------------|---------------|
| 0 y         |                  | \$10.00  | 2                | 30        | 0         | 10          | 30           | -1            |
| 1 y         |                  | \$10.00  | 2                | 50        | 50        | 50          | 50           | 2             |
| 2 y         |                  | \$10.00  | 2                | 200       | 100       | 200         | 200          | 10            |
| 3 y         |                  | \$10.00  | 2                | 200       | 100       | 200         | 200          | 5             |
| 4 y         |                  | \$10.00  | 2                | 200       | 100       | 200         | 200          | 10            |
| 5 y         |                  | \$10.00  | 2                | 30        | 10        | 30          | 30           | 5             |
| 6 y         |                  | \$10.00  | 2                | 50        | 50        | 50          | 50           | 5             |
| 7 y         |                  | \$10.00  | 2                | 5         | 10        | 5           | 5            | 5             |
| 8 y         |                  | \$10.00  | 2                | 5         | 10        | 5           | 5            | -1            |
| 9 y         |                  | \$10.00  | 2                | 25        | 10        | 10          | 15           | -1            |
| 10 y        |                  | \$10.00  | 2                | 3         | 0         | 0           | 5            | 5             |
| 11 y        |                  | \$10.00  | 2                | 5         | 10        | 5           | 5            | -1            |
| 12 y        |                  | \$10.00  | 2                | 50        | 50        | 50          | 50           | -1            |
| 13 y        |                  | \$10.00  | 2                | 5         | 10        | 5           | 5            | -1            |
| 14 y        |                  | \$10.00  | 2                | 5         | 10        | 5           | 5            | -1            |
| 15 y        |                  | \$10.00  | 2                | 5         | 10        | 5           | 5            | -1            |
| 16 y        |                  | \$10.00  | 2                | 5         | 10        | 5           | 5            | -1            |
| 17 y        |                  | \$10.00  | 2                | 5         | 10        | 5           | 5            | -1            |
| 18 y        |                  | \$10.00  | 2                | 5         | 10        | 5           | 5            | -1            |
| 19 y        |                  | \$10.00  | 2                | 5         | 10        | 5           | 5            | -1            |
| 20 y        |                  | \$10.00  | 2                | 5         | 10        | 5           | 5            | 5             |
| 21 y        |                  | \$999.99 | 6                | 300       | 50        | 200         | 200          | 10            |
| 22 y        |                  | \$10.00  | 2                | 30        | 10        | 30          | 30           | 2             |
| 24 y        |                  | \$10.00  | 2                | 200       | 100       | 200         | 200          | 15            |
| 25 y        |                  | \$10.00  | 2                | 30        | 10        | 30          | 5            | 2             |
| 26 y        |                  | \$10.00  | 2                | 50        | 50        | 50          | 50           | 2             |
| 27 y        |                  | \$10.00  | 2                | 200       | 100       | 200         | 200          | 10            |
| 28 y        |                  | \$10.00  | 2                | 200       | 100       | 200         | 200          | 10            |
| 29 y        |                  | \$10.00  | 2                | 200       | 100       | 200         | 200          | 10            |
| 30 y        |                  | \$10.00  | 2                | 5         | 10        | 5           | 5            | -1            |
| 31 y        |                  | \$10.00  | 2                | 5         | 10        | 5           | 5            | -1            |
| 32 y        |                  | \$10.00  | 2                | 5         | 10        | 5           | 5            | -1            |
| 33 y        |                  | \$10.00  | 2                | 5         | 10        | 5           | 5            | -1            |
| 34 y        |                  | \$10.00  | 2                | 50        | 50        | 50          | 50           | 2             |

### Questions:

1. Are all hospital patrons (yellow) given similar blocks?
2. Are all Wright State patrons (blue) given similar blocks?
3. Physical media items are less in demand—should we increase the max number of media items?
4. Should the number of holds allowed be increased?

# Look at the Data #5

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Compare your Loan Rule Determiner table to your Loan Rule table:





- Are there loan rules in your system that are no longer being used?

# Steps

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1. View your Loan Rule Determiner Table
  - Sierra > Admin Menu > Parameters > Circulation > Loan Rule Determiner
2. Sort the table by the Loan Rule column (to put the loan rules in sequential order)
3. Note any missing number (i.e. 1,2,4,6,7,8--#3 and #5 are missing)
4. Examine your Loan Rules table—do you still have defined rules for #3 and #5?
5. If so, determine if they are likely to be used again; if not, follow the steps in “Words of Caution #1” below . . .

| Loan Rule Determiner   |          |                     |                   |           |               |
|--|----------|---------------------|-------------------|-----------|---------------|
| File Tools   |          |                     |                   |           |               |
| <div>  Append            Save            Delete            Copy            Insert            Edit            View            Move            Print         </div> |          |                     |                   |           |               |
|  | Location | Patron Type         | Item Type         | Age Range | Rule Number ▲ |
| 1  | ?????    | 999,206,211         | 999               |           | 2             |
| 17   | 020*     | 1-8,16,24,26-29     | 002               |           | 3             |
| 216  | 14*      | 1-9,19,20,24,26-... | 002,020,022,02... |           | 3             |
| 16   | 020*     | 1-8,16,24,26-29     | 000,020-022,02... |           | 4             |
| 42   | 022*     | 1-8,16,20-22,24,... | 000,020,024,02... |           | 4             |
| 43   | 02200    | 2,5,24,26           | 23                |           | 4             |
| 217  | 14*      | 1-9,19,20,24,26-... | 000               |           | 4             |
| 203  | 10*      | 21                  | 000-116           |           | 5             |
| 204  | 11*      | 21                  | 000-116           |           | 5             |
| 213  | 13*      | 21                  | 000-116           |           | 5             |
| 218  | 14*      | 21                  | 000-116           |           | 5             |
| 201  | 10000    | 1-9,13,20,22,24,... | 000-115           |           | 6             |
| 202  | 10002    | 1,2,3,4,5,26        | 10                |           | 6             |
| 72   | 06*      | 21                  | 000-180           |           | 7             |
| 45   | 02202    | 1,4                 | 003               |           | 8             |
| 169  | 06501    | 2,3,6,7,27          | 61                |           | 13            |
| 170  | 06501    | 2,3,4,6,7,20,27-29  | 62                |           | 13            |
| 20   | 02101    | 1,4,5,24,26         | 000,020,021,02... |           | 14            |
| 30   | 02107    | 1,4,5,16,24,26      | 002               |           | 14            |
| 32   | 02109    | 5,24,26             | 023               |           | 14            |
| 23   | 02101    | 1 4 5 24 26         | 017               |           | 15            |

| Loan Rules   |                  |      |                   |
|--|------------------|------|-------------------|
| File Tools   |                  |      |                   |
| <div>  Append            Save            Delete            Copy         </div> |                  |      |                   |
|  | Name             | Code | Normal Loan Pe... |
| 1  | DO NOT DELE...   | N    | 0                 |
| 2  | Non-Circulati... | N    | 0                 |
| 3  | Hospital 7-day   | R    | 7                 |
| 4  | Hospital 14-d... | R    | 14                |
| 5  | Hosp ILL-21d...  | R    | 21                |
| 6  | Hospital 28-d... | R    | 28                |
| 7  | ILL-35 day       | R    | 35                |
| 8  | Hospital 1-day   | R    | 1                 |
| 9  | OK TO REUSE      | J    | 4                 |
| 10   | DO NOT DELE...   | R    | 14                |
| 11   | OK TO REUSE      | R    | 0                 |
| 12   | DO NOT DELE...   | R    | 28                |
| 13   | UL 14day me...   | R    | 14                |
| 14   | KC 7-day         | R    | 7                 |
| 15   | KC 14-day        | R    | 14                |
| 16   | Music Dept 1...  | R    | 70                |
| 17   | KC 28-day        | R    | 28                |
| 18   | Grandview 1-...  | R    | 1                 |
| 19   | Grandview 7-...  | R    | 7                 |
| 20   | KMC 14day L...   | R    | 14                |
| 21   | Grandview 2...   | R    | 21                |
| 22   | MVH 21-day       | R    | 21                |
| 23   | DO NOT DELE...   | R    | 28                |
| 24   | DO NOT DELE...   | R    | 77                |
| 25   | TEST RULE (L...  | R    | 1                 |
| 26   | UL 24hr          | J    | 24                |
| 27   | UL 3hr           | J    | 3                 |
| 28   | OK TO REUSE      | J    | 0                 |
| 29   | UL 72hr          | J    | 72                |
| 30   | SeabOrie Mo      | D    | 7                 |

# Words of Caution #1

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“Remember that time when the Systems Librarian deleted a loan rule??”

Loan Rules are assigned by their number:

| Loan Rule Determiner   |          |                        |                 |             |
|--|----------|------------------------|-----------------|-------------|
| File Tools   |          |                        |                 |             |
| Append            Save            Delete            Copy            Insert            Edit            View            Move |          |                        |                 |             |
|  | Location | Patron Type            | Item Type       | Rule Number |
| 85   | 06002    | 3,6,7                  | 015             | 65          |
| 86   | 06003    | 2,4,27-29              | 000-014,017-180 | 60          |
| 87   | 06003    | 3                      | 000-014,017-180 | 61          |
| 88   | 06003    | 6,7                    | 000-014,017-180 | 62          |
| 89   | 06003    | 1,5,8,11-17,19,20,2... | 000-014,017-180 | 63          |
| 90   | 06003    | 2,4,27-29              | 015             | 64          |
| 91   | 06003    | 3,6,7                  | 015             | 65          |
| 92   | 06006    | 2,4,27-29              | 000-180         | 60          |
| 93   | 06006    | 3                      | 000-180         | 61          |
| 94   | 06006    | 6,7                    | 000-180         | 62          |
| 95   | 06006    | 1,5,8,11-17,19,20,2... | 000-180         | 63          |
| 96   | 06008    | 2,4,27-29              | 000-180         | 60          |
| 97   | 06008    | 3                      | 000-180         | 61          |
| 98   | 06008    | 6,7                    | 000-180         | 62          |
| 99   | 06008    | 1,5,8,11-17,19,20,2... | 000-180         | 63          |
| 100  | 06009    | 2,4,27-29              | 000-180         | 60          |
| 101  | 06009    | 3                      | 000-180         | 62          |
| 102  | 06009    | 6,7                    | 000-180         | 62          |
| 103  | 06009    | 1,5,8,11-17,19,20,2... | 000-180         | 63          |
| 104  | 06010    | 2,4,27-29              | 000-180         | 60          |
| 105  | 06010    | 3                      | 000-180         | 61          |
| 106  | 06010    | 6,7                    | 000-180         | 62          |
| 107  | 06010    | 1,5,8,11-17,19,20,2... | 000-180         | 63          |
| 108  | 06011    | 2,4,27-29              | 000-180         | 60          |
| 109  | 06011    | 3                      | 000-180         | 61          |
| 110  | 06011    | 6,7                    | 000-180         | 62          |
| 111  | 06011    | 1,5,8,11-17,19,20,2... | 000-180         | 63          |

| Loan Rules |                      |
|------------|----------------------|
| File Tools |                      |
| Append     |                      |
|            | Name                 |
| 49         | DO NOT DELETE        |
| 50         | OL Media Institution |
| 51         | OL Media Patron      |
| 52         | OLD OL Instit/onsite |
| 53         | OK TO REUSE          |
| 54         | KC 7-day new items   |
| 55         | KC 2hr no fine       |
| 56         | KC 2hr reserve       |
| 57         | KC 4hr reserve       |
| 58         | KC 24hr reserve      |
| 59         | KC 7day reserve      |
| 60         | UL Fac/Staff 112 day |
| 61         | UL Grad 112 day      |
| 62         | UL Undergrad 112 day |
| 63         | UL Aff/Frnds 28 day  |
| 64         | UL 14 day NB/R FAC   |
| 65         | UL 14 day NB/R       |
| 66         | UL 14 day B/NR FAC   |
| 67         | UL 14 day B/NR       |
| 68         | UL 7 day NB/R        |
| 69         | UL Pop Reading (FAC) |
| 70         | UL Pop Reading       |
| 71         | OK TO REUSE          |
| 72         | ERC 2hr Rsv          |
| 73         | ERC 1-day Rsv        |

If Rule #59 is deleted, the rules below it all move up one . . .

Rule #63 becomes Rule #62 (your 112 day items are now circulating for 28 days!)

# Words of Caution #1

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- Rename the loan rule “DO NOT DELETE” if the rule is no longer active but still has items checked out on that rule
- Rename the loan rule to “OK TO USE” if the rule is no longer active and has no items checked out on that rule
- **DO NOT DELETE A LOAN RULE**
- Follow the instructions in the **Manual**: Sierra Guide > Using Circulation > Maintaining Circulation Parameters > Special Considerations for Maintaining Circulation Parameter Tables

# Words of Caution #2

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“Why does that location code display in **RED** in my item records?”

- Do not delete a branch (item) location code without first determining it is no longer used *anywhere* in your system
- If you delete a branch location code that is still used in your records, it will display in red and will not function as a valid code
- Follow the instructions in the **Manual**: Sierra Guide > Maintaining Location Codes > Deleting Location Codes



# Projects for the Over-Achiever

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Question: Are any of my current **Text of Circulation Notices** not in use?

Project:

- Create a database of your loan rules and add fields denoting which Text of Circulation Notice numbers are used in each rule
- Write queries for each Notice Text number—run the query to see which rules are using that Text
- Remember to keep the database updated

# Projects for the Over-Achiever

---

Question: Are my “drop hold” Text of Circulation Notices applicable?  
Are any new texts needed?

Project:

- View the Text of Circulation Notices (Sierra>Admin>Parameters>Circulation>Text of Circulation Notices) and look for any that contain the words “drop hold” in the Notice Type element
- These are the notices that are presented to staff when they cancel a hold in Sierra
- Read the texts, confer with your circulation staff and determine if the notices meet their needs
- More information in the **Manual**: Sierra Reference > Configuration Files and Tables > Text of Circulation Notices Table

# Projects for the Over-Achiever

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Question: Do my patrons receive the correct notices for Recalls? What about holds on overdue books? And what about Adjustments?

Project:

- Create a couple of fake patron records
- Grab a few old (little used) books from your stacks
- Outline your testing parameters:
  - What happens when I check this book out, it goes overdue, and someone else requests it?
  - What happens when I check this book out, it goes overdue, the patron gets billed, then subsequently returns it?
- Follow through with the tests and note which loan rule you are using, which notices arrive, and when, to determine if the correct notices are being sent

# Questions? Suggestions?

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