

Procedures Checklist for Libraries: The following Procedures Checklist is meant to act as a guide to help you organize the day-to-day administration of the Sierra System. The frequencies we suggest are recommendations and your library may perform certain activities more or less often depending upon your needs and policies. For hold pickup jobs, you may wish to run auto-notices instead of running them manually. If you would like to set up auto-notices, or if you have questions about performing any of these tasks, please contact Mid-Hudson Library System.

Daily -

Staff must run and fill paging requests (item and title).
Process overdue and bill notices.
Clear holdshelf and run the Clear Expired Holds and Holdshelf

Weekly -

Look at "view holds" and determine causes for old unfilled holds. Delete requests that cannot be processed.
Review order records that have not come in within the last month. Cancel those that will not be filled.
Generate the Fines and Fees by Date Range report from Fines Paid.

Monthly -

January:

Generate a report of previous Month's Statistics.
Generate High-Demand Holds Report.
Generate a report of Items that have been at the status In Transit too long.
Delete review files whose contents are no longer current or needed.
Generate Claims for late issues and print or email serial issue claims.
Generate a report of Items that have not circulated in 3 years.

February:

Generate a report of previous Month's Statistics.
Generate High-Demand Holds Report.
Generate a report of Items that have been at the status In Transit too long.
Delete review files whose contents are no longer current or needed.
Generate Claims for late issues and print or email serial issue claims.
Review items that should be deleted at year's end. This includes items with the following status: Billed, Lost and Paid, Missing, Claimed Returned, and Discard which have been out of circulation for more than 3 years. Any library that wishes to do this more frequently is encouraged to do so.

March:

Generate a report of previous Month's Statistics.
Generate High-Demand Holds Report.
Generate a report of Items that have been at the status In Transit too long.
Delete review files whose contents are no longer current or needed.
Generate Claims for late issues and print or email serial issue claims.
Generate a report of Patrons added to the library.
Generate a List of Delinquent patrons.

April:

Generate a report of previous Month's Statistics.
Generate High-Demand Holds Report.
Generate a report of Items that have been at the status In Transit too long.

Delete review files whose contents are no longer current or needed.
Generate Claims for late issues and print or email serial issue claims.
Generate a report of library cards about to expire.
Manage bounced circulation notices sent via email. (These notices will bounce to a library-designated fully-qualified email address.)

May:

Generate a report of previous Month's Statistics.
Generate High-Demand Holds Report.
Generate a report of Items that have been at the status In Transit too long.
Delete review files whose contents are no longer current or needed.
Generate Claims for late issues and print or email serial issue claims.
Generate a List of Delinquent patrons.
Generate a report of recently added items that have not circulated.
Generate a report of overdue items.

June:

Generate a report of previous Month's Statistics.
Generate High-Demand Holds Report.
Generate a report of Items that have been at the status In Transit too long.
Delete review files whose contents are no longer current or needed.
Generate Claims for late issues and print or email serial issue claims.
Generate a report of Patrons added to the library.
View outstanding holds and take appropriate action for problem holds, for example:
Holds on a Bibliographic record that no longer has any items that can fill the holds.
Holds on a Bibliographic record whose order has been cancelled.
Holds on an item that is billed or claims returned.
Holds that meet your library's definition of "problem holds."

July:

Generate a report of previous Month's Statistics.
Generate High-Demand Holds Report.
Generate a report of Items that have been at the status In Transit too long.
Delete review files whose contents are no longer current or needed.
Generate Claims for late issues and print or email serial issue claims.
Generate a List of Delinquent patrons.
Delete saved queries that are no longer used.

August:

Generate a report of previous Month's Statistics.
Generate High-Demand Holds Report.
Generate a report of Items that have been at the status In Transit too long.
Delete review files whose contents are no longer current or needed.
Generate Claims for late issues and print or email serial issue claims.
Generate a report of library cards about to expire.

September:

Generate a report of previous Month's Statistics.
Generate High-Demand Holds Report.
Generate a report of Items that have been at the status In Transit too long.
Delete review files whose contents are no longer current or needed.
Generate Claims for late issues and print or email serial issue claims.
Generate a report of Patrons added to the library.

Generate a List of Delinquent patrons.

Report to MHLS - Update Sierra Users/passwords at least once per year or when staff leave your employment.

Report to MHLS – Update Circulation Parameters. For example, update the Days Closed and Hours Open tables.

October:

Generate a report of previous Month's Statistics.

Generate High-Demand Holds Report.

Generate a report of Items that have been at the status In Transit too long.

Delete review files whose contents are no longer current or needed.

Generate Claims for late issues and print or email serial issue claims.

Generate a report of recently added items that have not circulated.

Generate a report of Items that have been at the status In Transit too long.

Generate a report of overdue items.

November:

Generate a report of previous Month's Statistics.

Generate High-Demand Holds Report.

Generate a report of Items that have been at the status In Transit too long.

Delete review files whose contents are no longer current or needed.

Generate Claims for late issues and print or email serial issue claims.

Generate a report of Library cards that have already expired.

Generate a List of Delinquent patrons.

Review and update your magazine holdings statements. Magazines that you no longer carry should be dropped, additions should be added and changes in your retention should be reflected.

December:

Generate a report of previous Month's Statistics.

Generate High-Demand Holds Report.

Generate a report of Items that have been at the status In Transit too long.

Delete review files whose contents are no longer current or needed.

Generate Claims for late issues and print or email serial issue claims.

Generate a report of Patrons added to the library.

Generate a report of library cards about to expire.

At year's end run reports you may need for audits

- Collection Value (Create lists- Sierra Statistics)
- Outstanding fines.