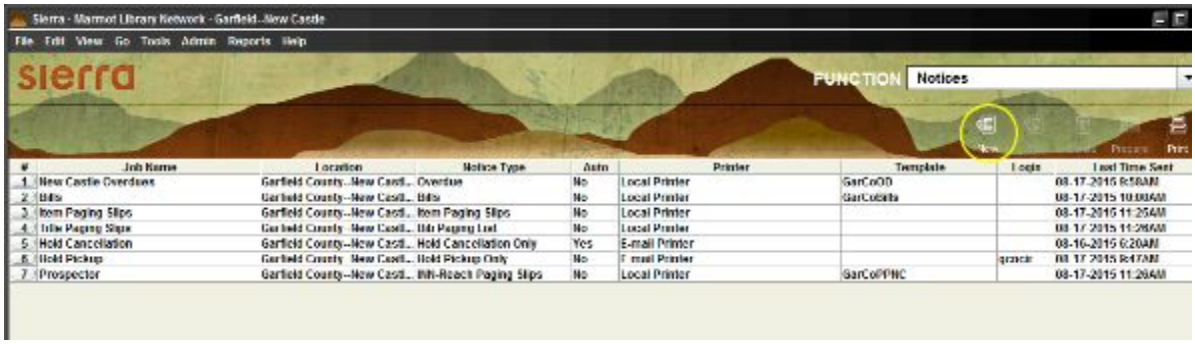
Take Notice: setting up your notices in Sierra

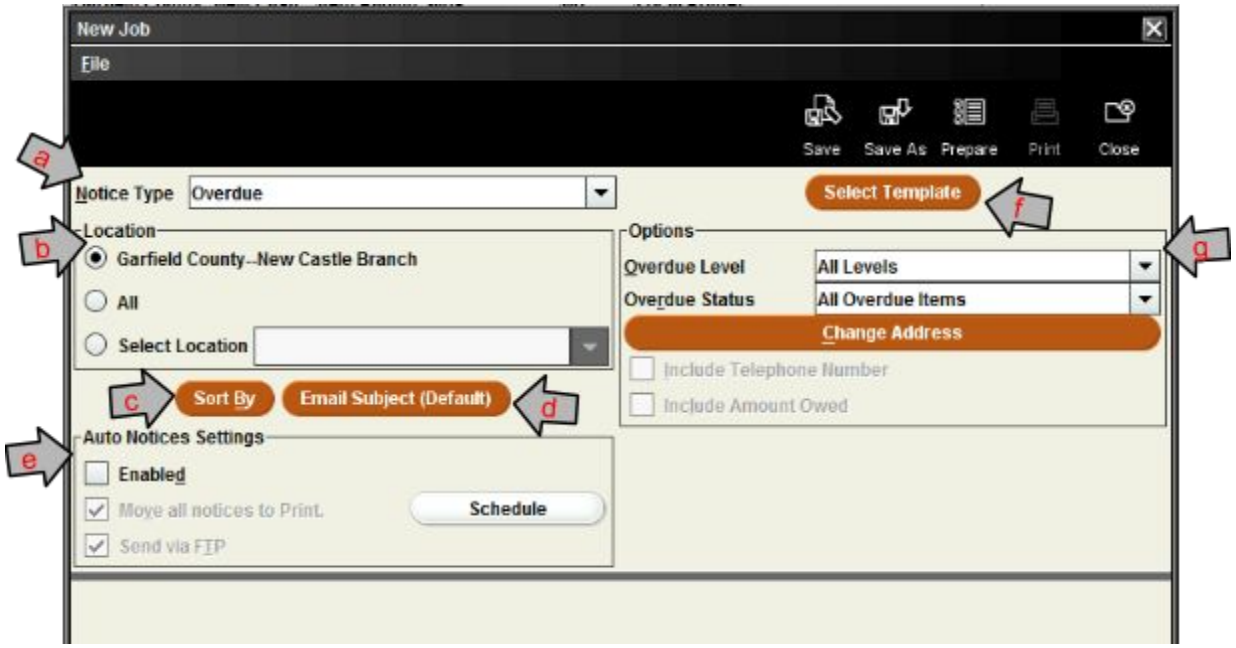
Learn what each notice means and how GCPLD has them up in Sierra. We will also cover INN-Reach Reports.

How to set up a new notice in Sierra:

- ❏ Make sure you are on the “Notices” function of Sierra.



- ❏ Click “New” icon on the upper right.
- ❏ In the new window:



a. Notice Type: Select the type of notice you want to produce.
b. Location: Select a Location. It should have your Branch as an option, and that should usually be what you need.
c. Sort By: Here you can choose which data fields
d. Email Subject (Default): Allows you to specify what message is sent.
e. Auto Notices Settings: You can set up notices to send automatically everyday, so you do not need to go in a manually send them.
f. Select Template: Only available when there is a template for that notice saved in Sierra. To find available templates under Admin - Settings - Print Templates.
g. Options: Varies due to the type of notice.

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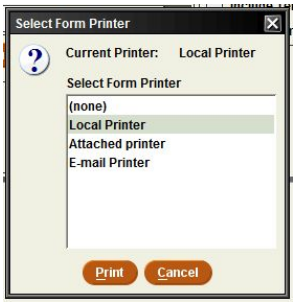
How to run a Notice:

- ❏ Once you have the settings how you would like, click “Prepare” to run the notice.
- ❏ You will be prompted to “Select Form Printer”



  a. Local Printer: Patrons with email notice preference setup will still receive emails; notices will print for patrons with the print notice preference and will need to be mailed.
  b. Email Printer: Patrons with email notice preference setup will still receive emails; notices in Print Queue will be sent to the email address entered, and dealt with by that employee.

- ❏ Once the printer is set, Sierra will run the report.
- ❏ Notice results will appear, E-mail notices first.

  a. Send Notices: Will send the notice and then allow you to clear them from the Queue, OR
  b. Move All to Print Queue: Will move the E-mail notices over the Print Queue.

- ❏ Once E-mail notices are handled, Print notices will appear.
- ❏ Send Notices and clear Queue.
- ❏ Close out of the Notice when finished.

How to save a Notice:

- ❏ Once the notices have been processed, Sierra will ask you if you want to Save new job.
  a. Save New Job?
  b. Select Form Printer
  c. Job Name

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INN-Reach Reports used in Sierra:

To access all of these reports you must be the INN-Reach - Reports function of Sierra.

- ❏ Institutional Overdues:
  - ❏ These are *your library's* items checked out to Prospector patrons, which are late in being returned.
  - ❏ This report helps keep items from showing up on other institutions Returned Too Long reports.

1. Minimum # of Days = 14
2. Sort By = Item Location
3. Click the "Prepare" button to run the report
4. Copy and Paste relevant items into a spreadsheet
5. Compare items in this report to the titles that appeared last time you ran the report
6. Perform a shelf check
   a. If found: check in and clear "off campus" status
   b. If not found: check record, contact library if it has been "In Transit" too long. (Subject: Prospector institutional overdues Memo: would you do a shelf check for these items?")
7. Items will stay on this list until Prospector Reconciliation Time
   a. When running report, keep old data to compare

- ❏ Paged Too Long:
  - ❏ Items requested from *your library* that for some reason has not been retrieved from your shelves and a patron is waiting for.
  - ❏ If your staff did not check the item out to the remote site correctly, it will show up on this list.

1. Minimum # of Days = 2
2. Sort By = Item Location
3. Click the "Prepare" button to run the report
4. Retrieve item from shelf:
   a. If item is not on shelf, wait a week to see if the item is ends up checked out at the prospector patron.
   b. If it is on the list longer than a week, mark missing and cancel hold
5. When you have the item(s), use the regular "check in" mode
   a. You will see a pop up stating that the item is requested by (Name) Prospector Library. Select YES to check the item.
   b. A second pop up will ask you if you want to fulfil the hold, select YES
   c. A third pop up will appear asking you to either print transit slip, or queue for later printing. Select "Queue for later printing."
6. Run Prospector Paging Slips and process item normally.

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- ❏ Returned Too Long:
  - ❏ These are Prospector items requested by *your patrons* and the patron has returned the item changing the status of the item as “Prospector Returned”. However, somehow the item has not been checked in at the owning library and the Prospector process is not complete.

1. Minimum # of Days = 14
2. Sort By = Patron Home Library
3. Click the “Prepare” button to run the report
4. Copy and Paste relevant items into a spreadsheet
5. Compare items in this report to the titles that appeared last time you ran the report
6. For each new item
    a. Perform a shelf check
    b. If not, contact the lending library and ask them to do a shelf check
        i. If the item was physically returned to the lending library but not checked in correctly, the item will appear on this list. Sometimes however it really did never make it home and we do not know what happened

- ❏ Requested Too Long:
  - ❏ These are items *your patrons* have requested from Prospector libraries, and for whatever reason the request has not yet been filled.

1. Minimum # of Days = 14
2. Sort By = Patron Home Library
3. Click the “Prepare” button to run the report
4. Copy and Paste relevant items into a spreadsheet
5. Compare items in this report to the titles that appeared last time you ran the report
6. Check the status of the item in the Prospector catalog
    a. If the item is “on shelf”, cancel and replace request
7. Look for alternative sources for the material if all copies are checked out
    a. If unavailable by other sources, keep the hold as is
8. Be sure to check if this really needs to be a Prospector request, or if the item is available in the Marmot system

- ❏ In Transit Too Long:
  - ❏ These are Prospector items in transit to *your library* that has never arrived.

1. Minimum # of Days = 14
2. Sort By = Patron Home Library
3. Click the “Prepare” button in the upper right list of options to run the report
4. Copy and Paste relevant items into a spreadsheet
5. Compare items in this report to the titles that appeared last time you ran the

report
6. For each new item
    a. Perform a shelf check
    b. If not, contact the lending library and ask them to do a shelf check

- ❏ Received Too Long:
    - ❏ These are Prospector items that have been received for *your patrons*, and should be on the hold shelf.

1. Minimum # of Days = 10
2. Sort By = Patron Home Library
3. Click the "Prepare" button in the upper right list of options to run the report
4. Copy and Paste relevant items into a spreadsheet
5. Perform a hold-shelf check to see if the item is in fact still on our hold shelf
    a. If the item is NOT on the hold shelf, check the building and shelves to make sure it is not hanging around some place it should not be.
        i. If the item is not in the building, contact the patron who it was on hold for to see if they have the item (meaning it was not checked out correctly) or if it is really missing
        ii. If not located, email the lending library and ask them to do a shelf check
    b. If the items IS on the hold shelf, return the item to the lending library as per the date on the hold slip
        i. To return a Prospector item go to the Functions drop down menu in Sierra → INN Reach → Return Unwanted Items and scan the barcode

How to obtain a Prospector Contact List:

- ❏ Go to https://www.coalliance.org
- ❏ Search contacts
- ❏ Select the results: Document Delivery Committee
- ❏ Click on the Committee Member List