



**Sitka**

# Shining a Light on Circulation Policies

## Viewing Your Circulation Policies:

- Run a report
  - Libraries that share resources with other libraries through Evergreen should run “Circulation Policies by Checkout Library”
  - Other libraries should run “Circulation Policies filtering by copy circ lib”

Both report templates can be found in the Reports interface under Shared Folders -> Templates -> Sitka\_templates -> Library Configuration.

[http://docs.libraries.coop/sitka/circulation\\_policies.html#viewing\\_your\\_circulation\\_policies](http://docs.libraries.coop/sitka/circulation_policies.html#viewing_your_circulation_policies)

## Understanding Your Circulation Policies:

### Circulation Policies Filters

- Patron Profile/Patron Type
- Library (Check out, Copy Circ, Home)
- Circulation Modifier
- Shelving Location
- Reference
- Item Age

### Circulation Policy Conditions

- Loan Duration (Short, Normal, Long)
- # of Renewals
- Recurring Fine (Low, Normal, High)
- Maximum Fine
- Item specific limit (if applicable)
- Hard Due Dates

[http://docs.libraries.coop/sitka/circulation\\_policies.html#understanding\\_your\\_circulation\\_policies](http://docs.libraries.coop/sitka/circulation_policies.html#understanding_your_circulation_policies)

## Troubleshooting Your Circulation Policies:

### Three common reasons why items do not circulate as expected:

1. Policy has changed and the circulation policy in Evergreen needs to be updated to match your actual library policy.
2. The expected policy does not currently exist in Evergreen.
3. The item level information for the item is incorrect. Most commonly the circulation modifier is incorrect.

[http://docs.libraries.coop/sitka/circulation\\_policies.html#troubleshooting\\_your\\_circulation\\_policies](http://docs.libraries.coop/sitka/circulation_policies.html#troubleshooting_your_circulation_policies)

## Useful Reports

(Don't forget to clone the template into your own folders before running the reports.)

Shared Folders -> Templates -> Sitka\_templates -> Collection -> Copy and Title Count

- Title & Item Count by Shelving Location and Circulation Modifier

Shared Folders -> Templates -> Sitka\_templates -> Collection -> Copy List by Item Attributes

- Shelving Location and Circ Modifier : Copies with Selected Shelving Location and Circ Modifier
- Circ Modifier : Copies without Circ Modifier

Shared Folders -> Templates -> Sitka\_templates -> Patrons -> Patron Count

- Total Patron Count