



# Sierra 6.5 Limits by Format Enhancement

# Sierra 6.5 has been released...

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A date has not yet been determined for when PrairieCat will upgrade to 6.5.

However, a new feature in 6.5 for patron checkout limits may require pre-planning now.

This affects only Basic Online and Fully Participating libraries.

# How do limits by format work now?

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We have 4 categories used to limit by format:

Max Item A = dvds

Max Item B = audiobooks

Max Item C = music cds

Max Item D = other formats



A numeric limit is set by patron type for each category.



The 4 Max Item location tables contain the locations that are limited *for all libraries that have requested limits*.

For example, patron type 4 (BR-REGULAR) has Max Item A set to 5. The limited locations are:  
brmdv (Bradley DVDs)  
breav (Bradley juvenile AV)

The patron can check out any combination of 5 items from those 2 locations:

4 brmdv    OR    2 brmdv    OR    5 breav  
1 breav            3 breav

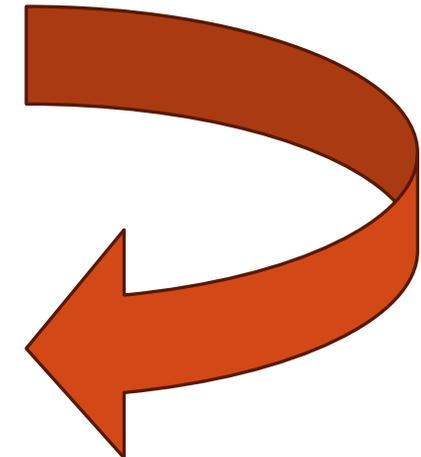
# How do limits by format work now?

Patron Blocks

File Tools

Append Save Delete Copy Insert Edit View Move

	Patron Type	Patron Agency	Patron Exp. Date	Max Owed	Highest Level Odu...	Max Items	Max Holds	Max ILL(at one time)	Max ILL(per interv	Max ItemA	Max ItemB	Max ItemC	Max ItemD
1	0	999	y	\$999.00	8	499	999	0	0	5	5	5	5
2	1	999	y	\$9.99	3	499	10	10	999	5	0	0	0
3	2	999	y	\$9.99	3	2	10	2	999	2	0	0	0
4	4	999	y	\$9.99	3	499	999	25	999	5	499	499	5
5	5	999	y	\$9.99	3	499	999	0	0	5	499	499	3
6	6	999	y	\$9.99	3	499	50	50	999	0	0	0	0
7	7	999	y	\$9.99	3	499	999	0	0	0	0	0	0
8	8	999	y	\$9.99	3	499	999	0	0	0	0	0	0
9	9	999	y	\$9.99	3	499	999	0	0	0	0	0	0



```

Item types & locs for category A
Current Values:
ITEM TYPES: NONE
OR
LOCATIONS:
lsmdv, anmdv, bdmdn, bdmdv, bladv, bmmdv, brmdv, breav, bymdv, byjav, clmdv, cnmdv, comdv, ctmdv, dkmdv, dkman, dkjdv, emmdv, epmdv, fgmdv,
flmdv, fpmdv, fpjdv, gamdv, grmdv, gvmdv, hcnav, hkmdv, hkmfd, hnmdv, hrjdv, jhmnd, jhmdv, kkman, kkmav, kkjav, krjdv, kradv, limdv, lpadv,
lpjdv, mamdv, mamjv, mbmdv, hradv, mlmav, mljav, mneav, mnjav, mnmdv, mnyav, mrmadv, mrmnd, mrmjd, nlgdn, ormdv, pemdv, peman, pomdv, prmdv,
prmd, ptmdv, ptmnd, pumdv, rkmdv, rkmjv, rlmdv, rlmd, rpmdv, rpmjv, rtmdv, rtmjv, ruadv, samdv, sbmdv, scmdv, scmjd, sdmdv, slmdv, snjav,
snmav, srmdv, srmjv, syadn, syadv, syjdv, tfadv, tfjdv, ykmdv, ykjdv, chadv, lradv, lrjdv, bljdv, bladn, wdjdv, wdjdw, wdmdv, wdmdw, msmnd,
msmdv, muadv, mujav, mujdv, mumav, mpmdv, mpjav, cpmdv, ncjdv, ncmdv, lomdv, wpadu, wpadv, wpjdu, wpjdv, mngtv, mkmav
    
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Any location in the table counts toward the limit.

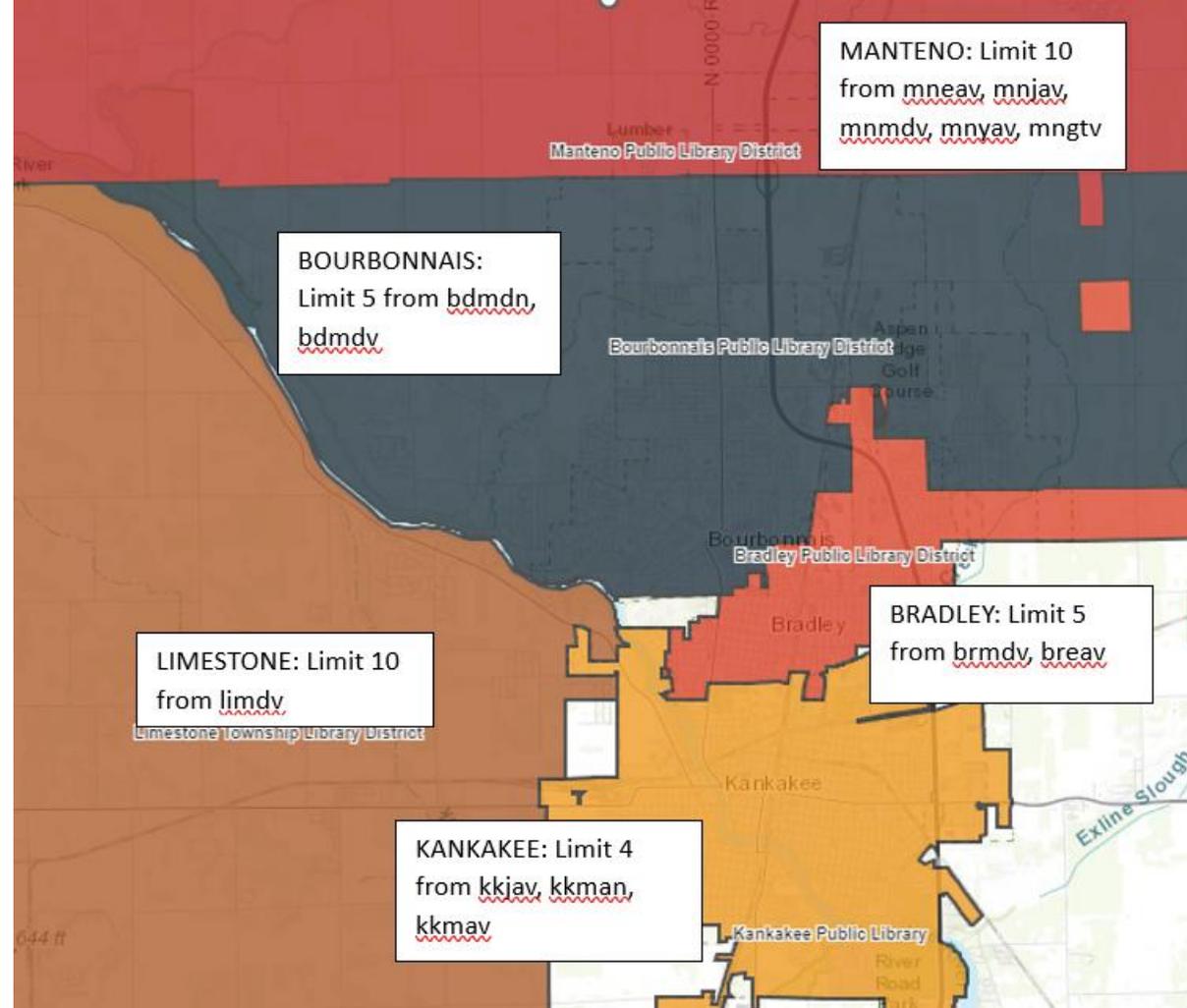
# PROS & CONS of current limits

## PROS:

- Locations are aggregated, so any combination of items from multiple locations (if entered in the corresponding Max Item table) count toward the limit. This means your library's lending policy of x DVDs per patron doesn't have to specify if they are new DVDs, adult DVDs, or juvenile DVDs, TV series, etc.
- If a patron ILLs a DVD owned by another library and that item's location is entered in the table, it counts toward the limit.
- If a patron ILLs a DVD owned by another library and that item's location is NOT entered in the table, it DOES NOT count toward the limit.
- The current limits are especially useful for libraries with multiple branches. For example, a patron with a limit of 5, can check out 5 dvds from the main location, but will be prohibited from checking out more at a branch.
- These limits follow the patron (sort of!). For example, a Harvard patron checks out the max of 10 DVDs, then goes to Cherry Valley and tries to check out more DVDs, that will not be allowed, because Cherry Valley also limits DVDs by location. However, if that same patron goes to Woodstock, they will be able to check out additional DVDs because Woodstock does not limit.

# PROS & CONS of current limits

Aggregation of locations



Item types & locs for category A

Current Values:

ITEM TYPES: NONE

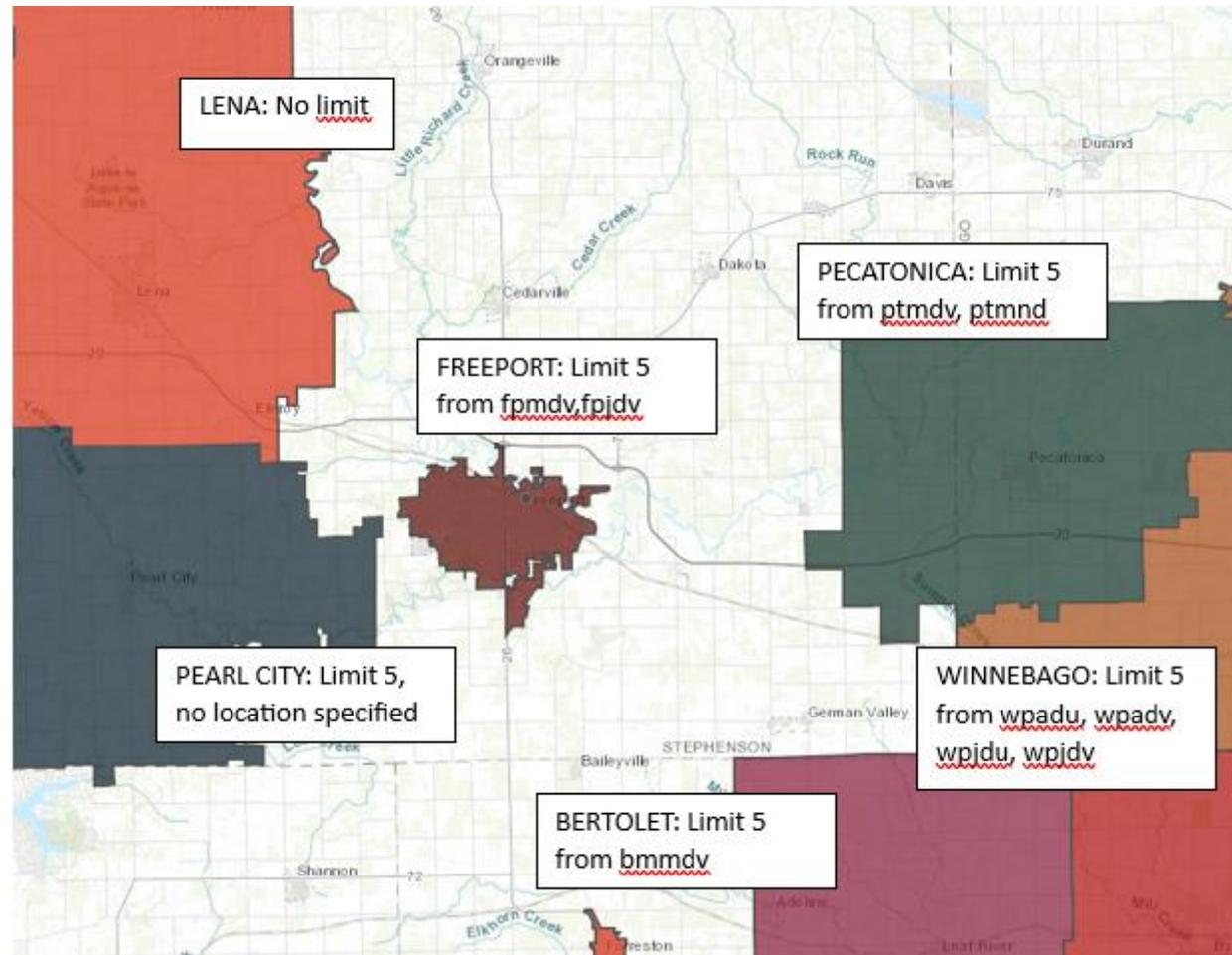
OR

LOCATIONS:

lsmdv, anmdv, bdmdn, bdmdv, bladv, bmmdv, brmdv, brev, bymdv, byjav, clmdv, cnmdv, comdv, ctmdv, dkmdv, dkman, dkjdv, emmdv, epmdv, flmdv, fpmdv, fpjdv, gamdv, grmdv, gvmdv, hcmav, hkmdv, hkmfd, hnmdv, hrjdv, jhmdv, jhmdv, kkman, kkmav, kkjav, krjdv, kradv, limdv, lpjdv, mamdv, mamjv, mbmdv, hradv, mlmav, mljav, mneav, mniav, mnmdv, mnyav, mrmav, mrmnd, nlgdn, ormdv, pemdv, peman, podmv, prmdv, ptmdv, ptmdv, pumdv, rkmdv, rkmjv, rlmdv, rlmnd, rmdv, rpmjv, rmdv, rtmjv, ruadv, samdv, sbmdv, scmdv, scmjd, samav, slmdv, smav, srmav, srmav, srmjv, syadv, syadv, syjdv, tfadv, tfjdv, ykmdv, ykjdv, chadv, lradv, lrjdv, bljdv, bladn, wdjdv, wdjdv, wdmdv, wdmdv, msmdv, muadv, mujav, mujdv, mumav, mpmdv, mpjav, cpmdv, ncjdv, ncmdv, lomdv, wpadv, wpadv, wpjdv, wpjdv, mngtv, mkmav

# PROS & CONS of current limits

Aggregation of locations



Item types & locs for category A

Current Values:

ITEM TYPES: NONE

OR

LOCATIONS:

lsmdv, anmdv, bmdn, bmdv, bladv, bmdv, brmdv, breav, bymdv, byjav, clmdv, cnmdv, comdv, ctmdv, dkmdv, flmdv, fpmdv, fpjdv, gamdv, grmdv, gvmdv, hcmav, hkmdv, hkmfd, hnmvd, hrjdv, jhmnd, jhmdv, kkman, kknav, lpjdv, mamdv, mbmdv, hradv, mlmav, mljav, mneav, mnjav, mnmdv, mnyav, mrmvd, mrmnd, mrmjd, nlgdn, prmdv, ptmdv, ptmnd, pumdv, rkmdv, rkmjv, rlmdv, rlmnd, rpmdv, rpmjv, rtmdv, rtmjv, ruadv, samdv, sbmdv, snmav, smdv, smjv, syadv, syadv, syjdv, tfadv, tfjdv, ykmdv, ykjdv, chadv, lradv, lrjdv, bljdv, bladn, msmdv, muadv, mujav, mujdv, mumav, mpmdv, mpjav, cpmdv, ncjdv, ncmdv, lomdv, wpadu, wpadv, wpjdu, wpjdv

# PROS & CONS of current limits

PRO:

- The current limits are tracked and recorded in the patron record. The fixed fields are: Current DVDs, Current Audiobks, Current Music, Current Misc.

Expiration Date	12-31-2037	Home Library		Current Misc	1
Patron Code 1	z NO CODE	Patron Message	- No Message	Patron Code 4	1300 Unknown
Patron Code 2	z Unknown	Manual Block	- ---	Patron Agency	
Patron Code 3	99 No age given	Claims Returned	1	Last Circ Activity	02-09-2026
Patron Type	168 UNION LIST LIBS	Money Owed	\$39.94	Preferred Language	eng_eng
Total Checkouts	20568	Current DVDs	7	Notice Preference	z Email
Total Renewals	4869	Current Audiobks	1	Total Registrations	0
Current Checkouts	286	ILL Request	0	Total Programs Attended	0
Birth Date	- -	Current Music	1	Waitlists on Record	0

## PROS & CONS of current limits

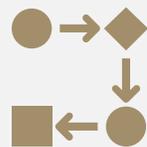
### CONS:

- If a patron ILLs a DVD owned by another library and that item's location is not entered in the table, it does not count toward the limit, so a patron would be allowed to check out more DVDs than your library's policy allows. A workaround is to enter every library's DVD locations in the table.
- We only have 4 categories. This means if your library wants to limit hotspots to 1 AND videogames to 3, you can limit one or the other, but not both. The same is true if you also want to limit Tonies, Library of Things items, Stem Kits, etc. Because of the limited number of categories, libraries have to manually police some circulation limits.
- Max Item D (miscellaneous) is currently used for a wide variety of items across multiple item types. For example, Wilmington uses Max Item D to limit patrons to 1 hotspot. If a patron checks out a hotspot and then ILLs videogames from another library that limits, the videogame checkouts will generate an error message.

The takeaway  
for current  
limits:



**Allows us to aggregate locations  
to meet the limit**



**Is too limited for specialized  
formats.**

# Sierra 6.5 Patron Checkout Limits

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This new feature is intended to provide more control over how many items patrons can check out. It is controlled by the patron type and the item type OR the patron type and the item location.

This will allow you to limit multiple formats by item type, which is not currently possible.

For example, Wilmington Public Library could choose to limit their patron 141 WL-REGULAR to:

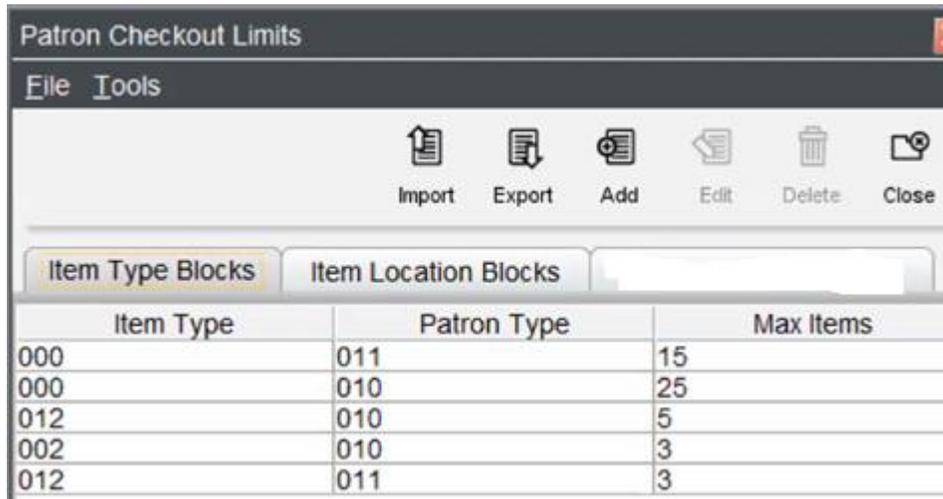
Item type 89 (hotspots) = 1

Item type 108 (library of things) = 2

Item type 81 (launchpads) = 1

# How will new limits work?

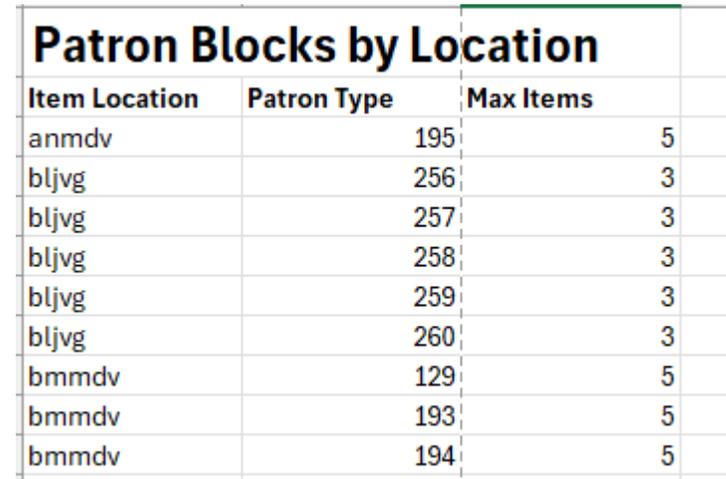
Patron type and item type:



The screenshot shows a software window titled "Patron Checkout Limits" with a menu bar containing "File" and "Tools". Below the menu bar is a toolbar with icons for "Import", "Export", "Add", "Edit", "Delete", and "Close". There are two tabs: "Item Type Blocks" (selected) and "Item Location Blocks". The table below has three columns: "Item Type", "Patron Type", and "Max Items".

Item Type	Patron Type	Max Items
000	011	15
000	010	25
012	010	5
002	010	3
012	011	3

Patron type and item location:



The table is titled "Patron Blocks by Location" and has three columns: "Item Location", "Patron Type", and "Max Items".

Item Location	Patron Type	Max Items
anmdv	195	5
bljvg	256	3
bljvg	257	3
bljvg	258	3
bljvg	259	3
bljvg	260	3
bmmdv	129	5
bmmdv	193	5
bmmdv	194	5



# Sierra 6.5 Patron Checkout Limits

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## Old Limits:

For example, patron type 4 (BR-REGULAR) has Max Item A set to 5. The limited locations are:

brmdv (Bradley DVDs)  
breav (Bradley Juvenile AV)

The patron can checkout any combination of DVDs from those 2 locations.

## New Limits:

Patron type 4 could be limited to:

2 of item type 50 (DVD Short)  
2 of item type 51 (DVD Long)  
2 of item type 52 (DVD New)  
2 of item type 53 (DVD Other New)

OR

3 from location brmdv  
3 from location breav

WORKAROUND: Change to 1 location code for all DVDs and set a limit of 5 for that one location, not a solution for libraries with multiple locations

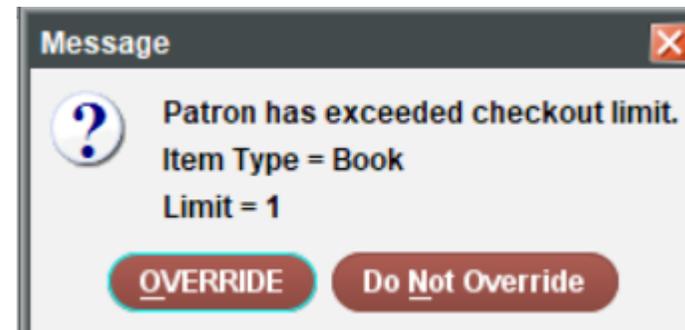
IMPORTANT!: if you limit by location, DVDs from other libraries will not be subject to the limit. You may want to limit by item type instead.

# PROS & CONS of new limits

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## PROS:

- Can limit a wide variety of item types (may need to re-visit if time to process transaction is impacted)
- Circulation staff would not be required to manually police limits
- If you limit a patron type by item type, that limit is honored regardless of the owning library because item types are standardized across PrairieCat
- Error message is more descriptive than current message



# PROS & CONS of new limits

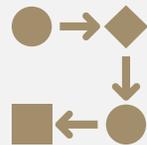
## CONS:

- Format limits will not be tracked in the patron record, the 4 fixed fields are not applicable.
- For libraries that want to limit DVDs, it is recommended that you limit by item type and not by item location. For example, you can limit by location, but that will apply to only your library's DVD locations. Your patron could go to any other library and check out multiple DVDs and will not be limited.
- The larger the Patron Checkout Limits table is, the longer some transactions could take to process. We may need to limit libraries to a maximum number of limits by item type and item location. We won't know if we're impacted until we go live with this enhancement.

## The takeaway for new limits:



**Does not allow us to aggregate  
locations**



**Provides more opportunity to  
limit for specialized items.**

## What are our options?

We must use either the old OR the new limits, we cannot use both.

### OPTION 1:

Continue using the old limits as is.

Ability to limit by specific item type for special items is limited to 1 category.

**No changes needed**

### OPTION 2:

Continue using the old limits.

Repurpose the Max Item B through C categories. For example, we would no longer limit audiobooks and music cds. Currently, 10 libraries use multiple locations for audiobooks and 12 libraries use multiple locations for music cds.

We could repurpose (for example):

Max Item B = videogames

Max Item C = hotspots

Max Item D = miscellaneous

This could be a stopgap measure (libraries can still limit only 4 formats or a combo of multiple formats), but it allows us to keep the aggregation of locations and limits the number of libraries that may need to adjust their lending policies. \*\*\*

**Changes can be made at any time**

### OPTION 3:

Implement the new limits and affected libraries will need to decide how to handle their items.

**Changes cannot be implemented until after 6.5**

# If we adopt the new limits, who is most affected?

37 Libraries don't use limits at all:

CC, CF, CR, CV, EL, ER, FR, GP, GV, HA, HE, JC, JO, LE, MI, MK, MM, MO, MT, OD, OG, PD, PF, PP, PU, PX, RD, RO, SE, SK, TC, TW, UC, UE, UT, WA, WR

**ACTION REQUIRED:**  
None

If you wish to set new limits, log a help desk ticket

31 Libraries limit by only one location:

AN, BM, CL, CN, CO, CP, CT, EA, EM, EP, FG, FL, GA, GE, GR, HC, HD, HN, LI, LO, LS, MB, NL, OR, PO, RU, SA, SB, SD, WL, WO

**ACTION REQUIRED:**  
Your existing limits will be implemented in Sierra 6.5, but please review your limits to see if changes are needed. Note that items from other libraries will not count toward these limits.

If you wish to change or set new limits, log a help desk ticket

36 Libraries (35%) limit by multiple locations for DVDs:

BD, BL, BR, BY, CH, DK, EJ, FP, HK, HR, JH, KK, KR, LP, MA, ML, MN, MP, MR, MU, MX, NC, PE, PR, PT, RL, RP, SC, SL, SN, SR, SY, TF, WD, WP, YK

**ACTION REQUIRED:**  
Decide your new limits and log a help desk ticket before implementation date (TBD), otherwise,

**NO LIMITS WILL BE SET UP FOR YOUR LIBRARY**

→ Libraries in red limit DVDs by 1 location

If we re-purpose  
Max Item B and  
Max Item C:

Libraries that currently limit audiobooks:

CH, FL, LP, MR, MU, NC, SA, SL, SY, WP

Libraries that currently limit music cds:

CH, FG, FL, GA, LP, MA, MU, RU, SA, SY, TF,  
WP

# Next steps:

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## OPTION 1:

Continue using the old limits as is.

**No changes needed**

## OPTION 2:

Continue using the old limits, but re-purpose Max Item B and C.

- Log help desk ticket with ILL to re-name these two fields in patron record
- **Add all DVD locations to Max Item A table?**
- **Decide what Max Item B will be used for: Videogames?**
- Change Max Item B table and patron blocks table accordingly
- **Decide what Max Item C will be used for: Hotspots?**
- Change Max Item C table and patron blocks table accordingly
- Change Max Item D table and patron blocks table accordingly

**Changes can be made at any time—select implementation date?**

## OPTION 3:

- Enter new limits from Sierra 6.5 Limits spreadsheet on training server
- Test limits on training server
- Repeat above for production server
- Must empty all Max Item tables
- Must set patron blocks to 0 for Max Item A-D for ALL patron types

**Changes cannot be implemented until after 6.5**

# Need to set new limits for non-PrairieCat reciprocal borrowers:

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## **CURRENT LIMITS for patron type 107:**

- Max Item A (DVDs): 3
- Max Item B (Audiobooks): 3
- Max Item C (Music CDs): 3
- Max Item D (Other): 5

## **NEW LIMITS?**

- Max Item A (DVDs):
- Max Item B ( ):
- Max Item C ( ):
- Max Item D ( ):

# What you need to do now:



We encourage all basic online and fully participating libraries to review the Sierra 6.5 Limits spreadsheet (PBLOCKS by Library worksheet tab) for their library.



If you need changes to your limits, please [log a help desk ticket.](#)



Thank you!