ConnectNY Pickup Anywhere (PUA) Processing Manual:
Sierra Desktop Application (SDA)
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OWNING SITE - CHECK OUT

Step 1: Go to Sierra Desktop Application (SDA) > Notices

Step 2: Click Pickup Anywhere Paging Slips notice type

Step 3: Prepare and print the notices in the same way that you print regular INN-Reach paging slips.*

Step 4: Retrieve the item.

Step 5: Go to the “INN-Reach - Check-Out to Remote Site” function. Scan/enter the item barcode to check the item out to the remote site, as you would any regular INN-Reach item. Click OK.

Step 6: Prepare the item for shipping to the Pickup Anywhere location, including applying the special CNY Pickup Anywhere sticker. Ship the item to the Pickup Anywhere location.

*NOTE: For some libraries, the Pickup Anywhere paging slips may be combined with your regular INN-Reach paging slips, making the printing of Pickup Anywhere paging slips via a separate notice job unnecessary.
Step 1: In Sierra, go to the “Pickup Anywhere - Receive Item” function. Scan/enter the item barcode to search for the item in the Pickup Anywhere database.

Step 2: If only one item matches your search, the system displays the item in the table and automatically selects it. Click the Process button to receive the item. If more than one item matches your search, select the item(s) that have arrived and click the Process button to receive the item(s). The item’s status changes from Shipped to Received:

Step 3: Place the item on the Pickup Anywhere holdshelf to await pickup by the patron.

**NOTE**: You can also search for the item by Title or Owning Site.
PATRON NOTIFICATION

After the PUA location (receiving site) receives the item, the system sends a message to the patron’s server to create a hold pickup notice. The hold pickup notice has the same format and is generated the same way as a standard hold pickup notice except that it instructs the patron to pick up the item at the requested PUA location.

RECEIVING SITE (PUA LOCATION) - CHECK OUT TO PATRON

Step 1: Go to the “Pickup Anywhere - Check-Out” function in Sierra. Enter the patron’s name in the Patron Name box and click the Search button:

Step 2: If only one patron matches your search, the system retrieves that patron’s information and displays the Pickup Anywhere items that were sent to your site for this patron. Select the item(s) that you want to check out to the patron and click the Process button:
The due date will appear in the Status column:
PROCESSING PUA RETURNS

The patron can return the item(s) to any PUA participating library in CNY (visit www.connectny.org/for-staff/ for list of participating libraries). The steps to process the returned item vary depending upon the return site’s relationship to the patron and the request.

SCENARIO #1: ITEM IS RETURNED TO PUA LOCATION (INITIAL RECEIVING SITE)

Step 1: If the patron returns the item to the same location where the item was checked out, go to the “Pickup Anywhere - Return Item” function to return the item.

Scan/enter the item barcode to search for the item in the PUA database:

![Image of Sierra library system interface]

Step 2: If only one item matches your search, the system displays the item in the table and it is automatically selected. If more than one item matches your search, the system lists the matching items in the table but does not automatically select any of the displayed items. Verify the item(s) you are returning and click the Process button to return the item. The item’s status changes to Returned.

![Image of Sierra library system interface with matching item selected]

Step 3: Ship the item to the owning site.

***NOTE: You can also search for the item by Title or Patron Name.
SCENARIO #2: ITEM IS RETURNED TO PATRON’S HOME INSTITUTION

Step 1: If patron returns the item to his/her home institution, go to the “Check-In (No Patron)” function to return the item as you would any regular INN-Reach item:

Step 2: Check in the item and ship it to the owning site:
SCENARIO #3: ITEM IS RETURNED TO OWNING SITE

Step 1: If the patron returns the item to the owning site, go to the “Check-In (No Patron)” function to return the item as you would any regular INN-Reach item:
SCENARIO #4: ITEM IS RETURNED TO ANY OTHER PUA LIBRARY

Step 1: Go to the “Pickup Anywhere - Return Item” function to return the item and scan/enter the item barcode to search for the item in the PUA database. The system will not find the item because your library was not part of the initial Pickup Anywhere request:

![Image of Pickup Anywhere - Return Item function](image)

Step 2: Select the owning site from the Site drop-down menu and click the Submit button:

![Image of Site drop-down menu selection](image)

Step 3: Ship the item to the owning site.

+ NOTE: You can also search for the item by Title or Patron Name. When the item is not found, you must select the owning site and scan/enter the item barcode before clicking Submit to return the item.
OWNING SITE - CHECK IN

For after Scenarios #1, #2, or #4.

Step 1: Go to the “Check-In (No Patron)” function to check in the item as you would any regular INN-Reach item:
**Pickup Notice in Patron Record**

If a patron comes to checkout an item at their home library and also has a PUA item ready for pickup at another CNY institution, the pop up message that displays is the same as if they had a regular INN-Reach item ready for pickup:

![Image of message dialog box showing 1 INN-Reach item(s) ready for pickup]

*Step 1:* To determine whether the item is available locally or at another CNY institution, access the **Holds** tab in the patron’s record.

*Step 2:* Locate the **Pickup At** column and look for the phrase “Pick Up Anywhere:”

*Step 3:* Expand the column or hover over the cell to see the item’s location:

![Image of holds table with rows for No Barcode and 10167172p9rpiu]

**Note:** PUA pickup notice emails are generated by the patron’s home institution server, not the Pickup Location. Running INN-Reach notices will generate PUA pickup notice emails.
ITEM IDENTIFICATION

Pickup Anywhere items should be identified by affixing the CNY supplied PUA stickers to the book label:

NOTE: The current batch of PUA stickers are very tacky; to avoid damaging items, please only affix stickers to book labels. Labels can be downloaded at www.connectny.org/for-staff/
NOTE: You will need a CS Direct/Supportal login to access this information.

- Printing Pickup Anywhere Paging Slips
  https://csdirect.iii.com/sierrahelp/Default.php#sgcir/sgcir_ireach_pickup_anywhere_paging.html

- Checking Out an Item to the Pickup Anywhere Location
  https://csdirect.iii.com/sierrahelp/Default.php#sgcir/sgcir_ireach_pickup_anywhere_checkout.html

- Receiving an Item at the Pickup Anywhere Location
  https://csdirect.iii.com/sierrahelp/Default.php#sgcir/sgcir_ireach_pickup_anywhere_receive.html

- Notifying the Patron that the Pickup Anywhere Item Is Available
  https://csdirect.iii.com/sierrahelp/Default.php#sgcir/sgcir_ireach_pickup_anywhere_notify.html

- Checking Out a Pickup Anywhere Item to the Patron
  https://csdirect.iii.com/sierrahelp/Default.php#sgcir/sgcir_ireach_pickup_anywhere_pcheckout.html

- Checking In a Pickup Anywhere Item from the Patron

- Receiving a Pickup Anywhere Item at the Owning Site
  https://csdirect.iii.com/sierrahelp/Default.php#sgcir/sgcir_ireach_pickup_anywhere_checkin.html