

## Managing PINs in the Sierra Client

It is the suggested protocol to have patrons manage their own PINs through their patron record in the WebPac– in order for this to work, though, the patron record must have a valid email address in their patron record and the patron must have access to that email.

Staff can help manage PINs for patrons who are unable or unwilling to manage their own PINs through the patron record in the staff client.

Once entered, it is not possible to recover or view a PIN number as only the encrypted value “\*\*\*\*\*” is available to view.

If a patron forgets their PIN, simply deleting the existing PIN allows them to create a PIN via the WebPac, or staff can add a PIN to their record for them, following the instructions below.

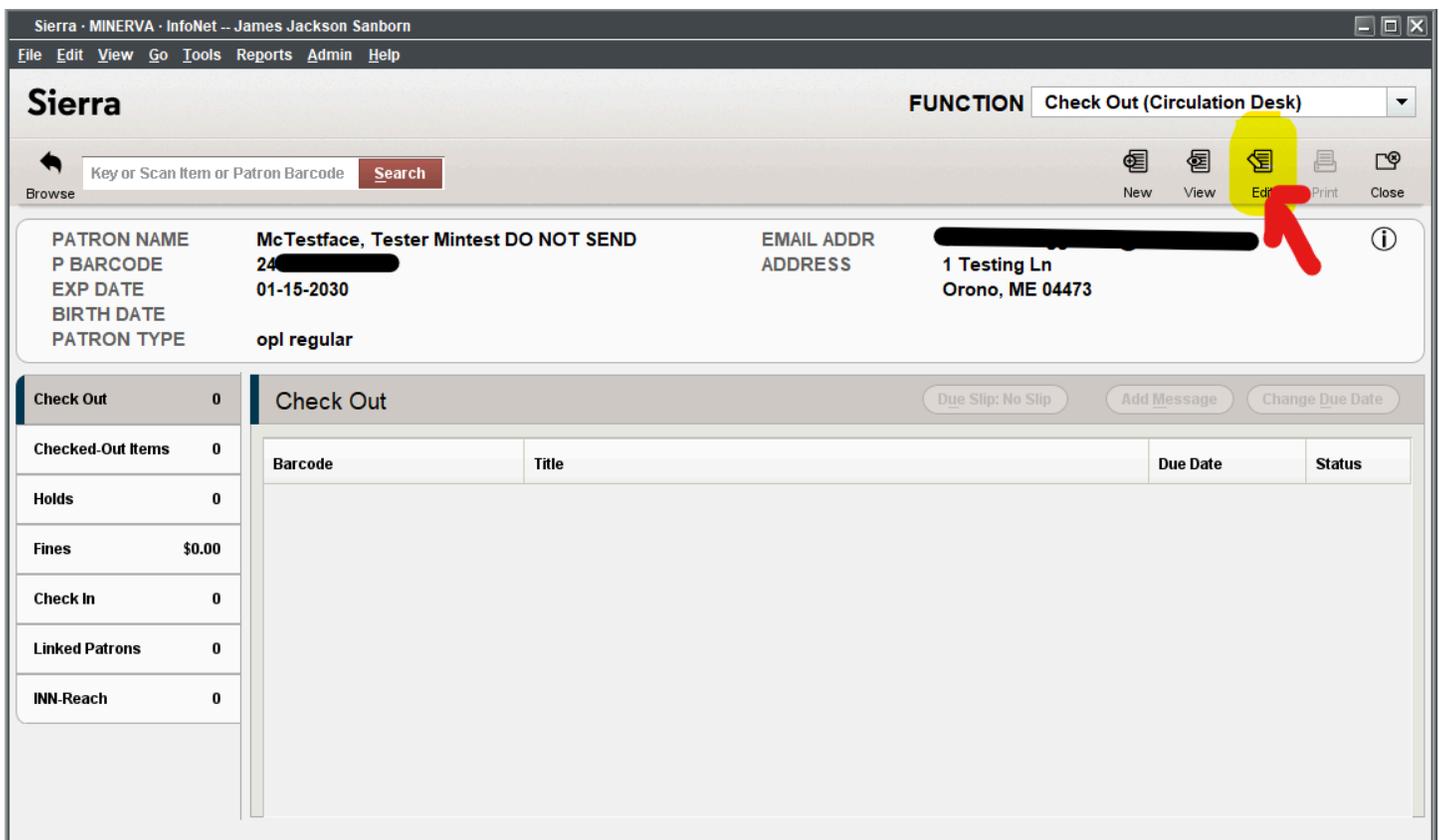
If staff are helping patrons with their PINs, there are two main actions possible

[Adding a PIN to a client record](#)

[Deleting a PIN from a client record](#)

### Adding a PIN to a patron record:

- 1) In the Sierra client open the patron and click ‘Edit’



The screenshot shows the Sierra client interface. The title bar reads "Sierra · MINERVA · InfoNet -- James Jackson Sanborn". The menu bar includes "File", "Edit", "View", "Go", "Tools", "Reports", "Admin", and "Help". The main header displays "Sierra" on the left and "FUNCTION Check Out (Circulation Desk)" on the right. Below the header is a search bar with the text "Key or Scan Item or Patron Barcode" and a "Search" button. To the right of the search bar are icons for "New", "View", "Edit", "Print", and "Close". The "Edit" icon is highlighted in yellow, and a red arrow points to it. Below the search bar is a patron record for "McTestface, Tester" with the following details:

PATRON NAME	McTestface, Tester	EMAIL ADDR	*****
P BARCODE	24*****	ADDRESS	1 Testing Ln
EXP DATE	01-15-2030		Orono, ME 04473
BIRTH DATE			
PATRON TYPE	opl regular		

Below the patron record is a "Check Out" section with a table of checked-out items. The table has columns for "Barcode", "Title", "Due Date", and "Status". The table is currently empty. To the left of the table is a sidebar with various statistics:

Check Out	0
Checked-Out Items	0
Holds	0
Fines	\$0.00
Check In	0
Linked Patrons	0
INN-Reach	0

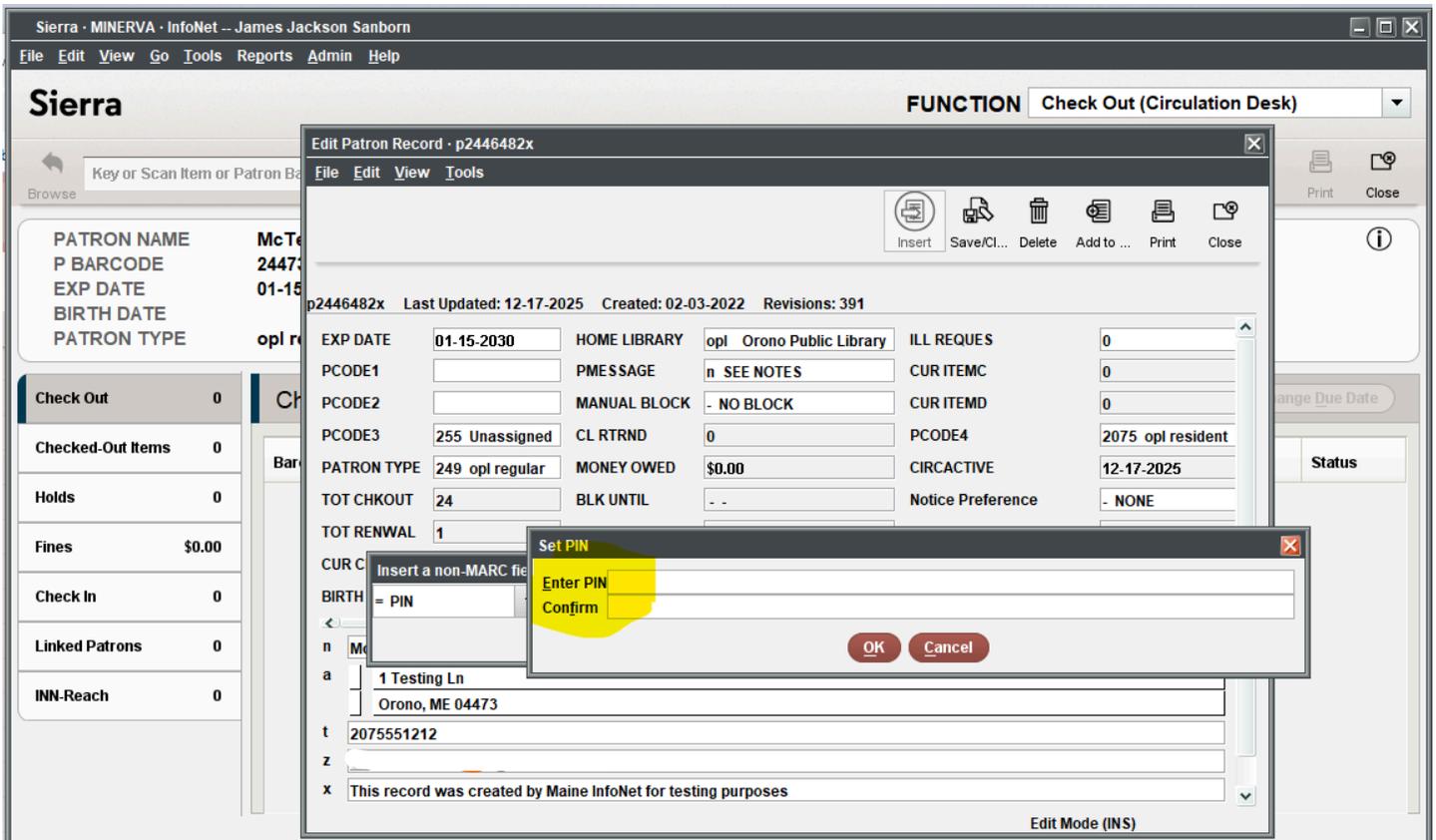
2) Once viewing the record in edit mode, click 'Insert'

The screenshot shows the Sierra software interface. The main window is titled 'Sierra' and has a 'FUNCTION' dropdown set to 'Check Out (Circulation Desk)'. A dialog box titled 'Edit Patron Record - p2446482x' is open in the center. The dialog box has a menu bar with 'File', 'Edit', 'View', and 'Tools'. Below the menu bar is a toolbar with several icons. A red arrow points to the 'Insert' icon, which is highlighted with a yellow circle. The dialog box contains a form with various fields for patron information, including 'EXP DATE', 'HOME LIBRARY', 'ILL REQUES', 'PCODE1', 'PMESSAGE', 'CUR ITEM C', 'PCODE2', 'MANUAL BLOCK', 'CUR ITEM D', 'PCODE3', 'CL RTRND', 'PCODE4', 'PATRON TYPE', 'MONEY OWED', 'CIRCACTIVE', 'TOT CHKOUT', 'BLK UNTIL', 'Notice Preference', 'TOT RENWAL', 'CUR ITEM A', 'Total Registrations', 'CUR CHKOUT', 'CUR ITEM B', 'Total Programs Attended', 'BIRTH DATE', 'OD PENALTY', and 'Waitlists on Record'. Below the form is a text area with the following text: 'n McTestface, Tester Mintest DO NOT SEND', 'a 1 Testing Ln', 'Orono, ME 04473', 't 2075551212', 'z', and 'x This record was created by Maine InfoNet for testing purposes'. The dialog box is in 'Edit Mode (INS)'.

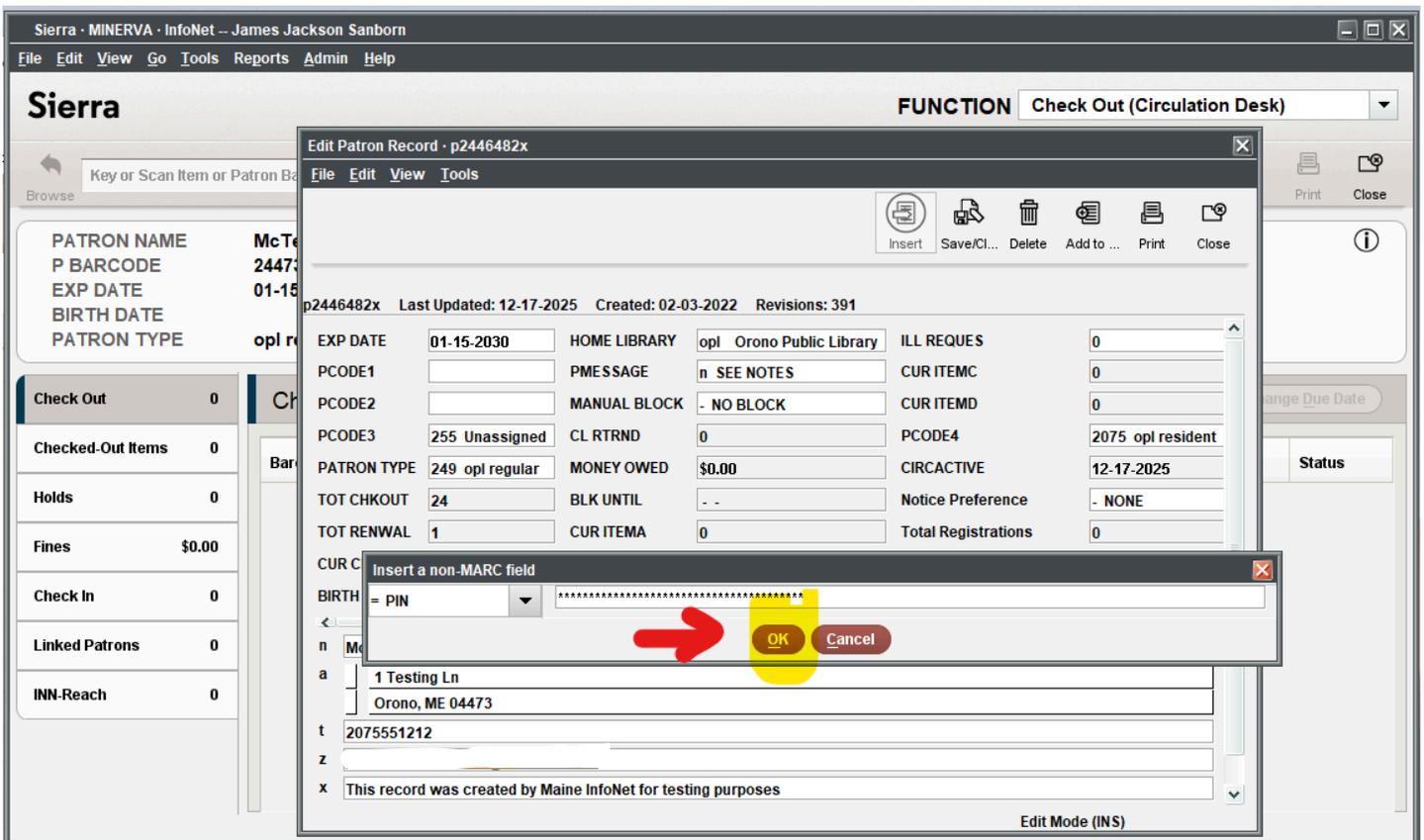
3) In the "Insert a non-MARC field" select the '= PIN' option from the dropdown

The screenshot shows the Sierra software interface, similar to the previous one. The 'Edit Patron Record' dialog box is open, and the 'Insert' button in the toolbar is highlighted with a yellow circle. A dropdown menu titled 'Insert a non-MARC field' is open, showing a list of options. The option '= PIN' is selected and highlighted with a yellow circle. A red arrow points to the '= PIN' option. The dropdown menu also includes options like 'TEACHER', 'HOME ROOM', 'UPD STATUS', 'EXTRCT DATE', 'NOTE', 'P BARCODE', 'OLD BARCODE', and 'MESSAGE'. The dialog box is in 'Edit Mode (INS)'.

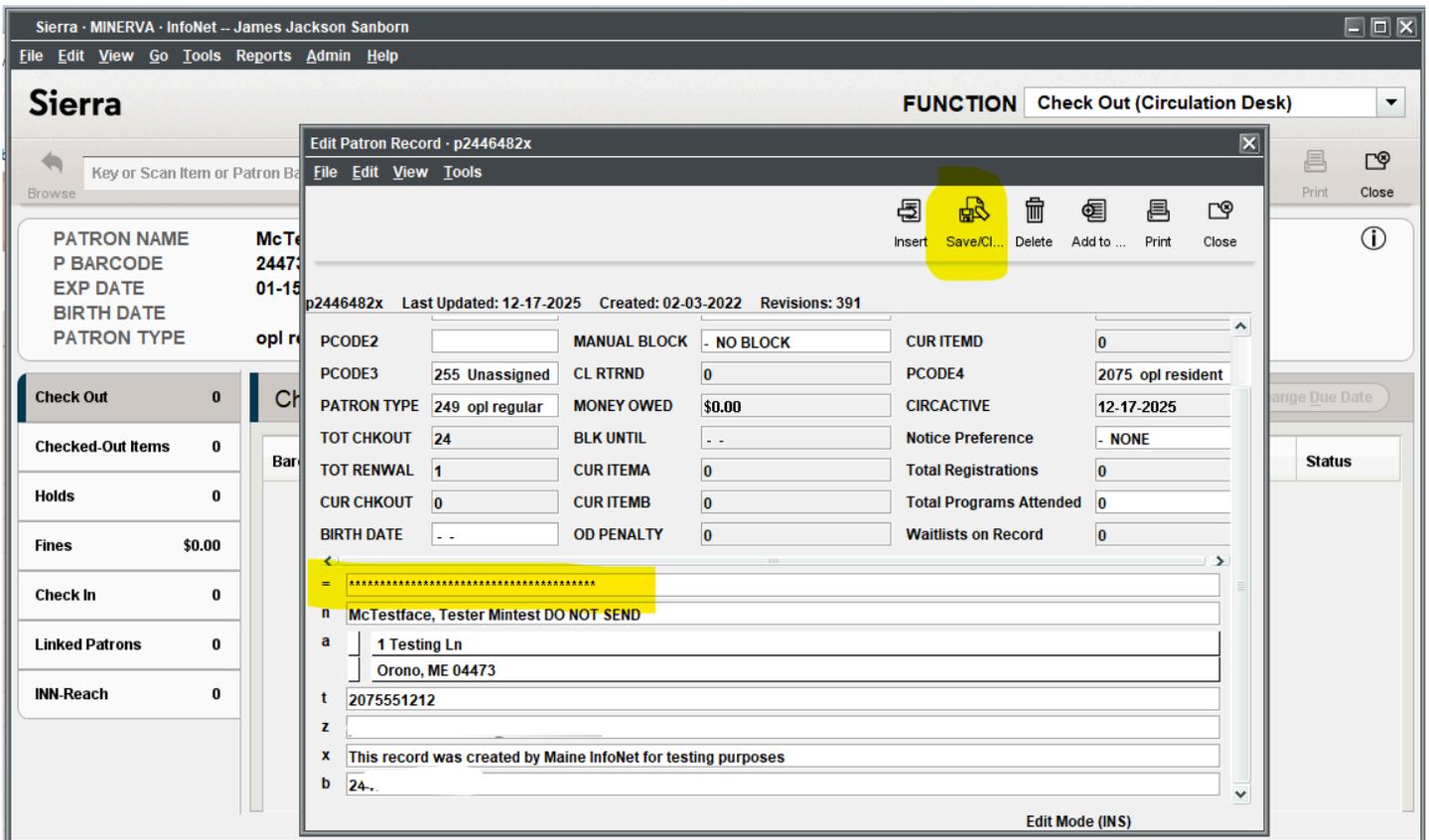
4) In the "Set PIN" dialog box, enter the same a 4 digit PIN number in both boxes and click 'OK'



5) The PIN will be converted to an encrypted value. Click 'OK'



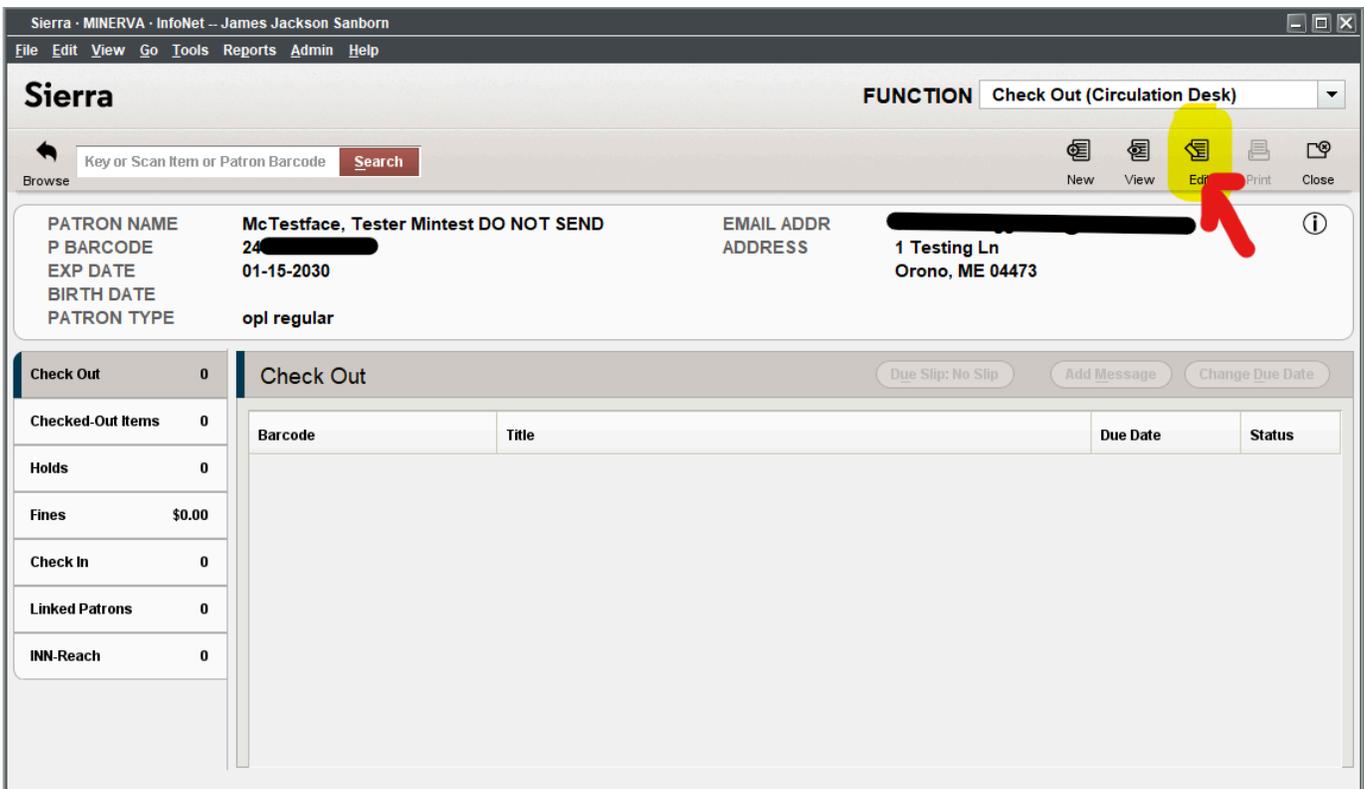
6) The PIN will now be displayed in the '=' tagged field at the top of the record.



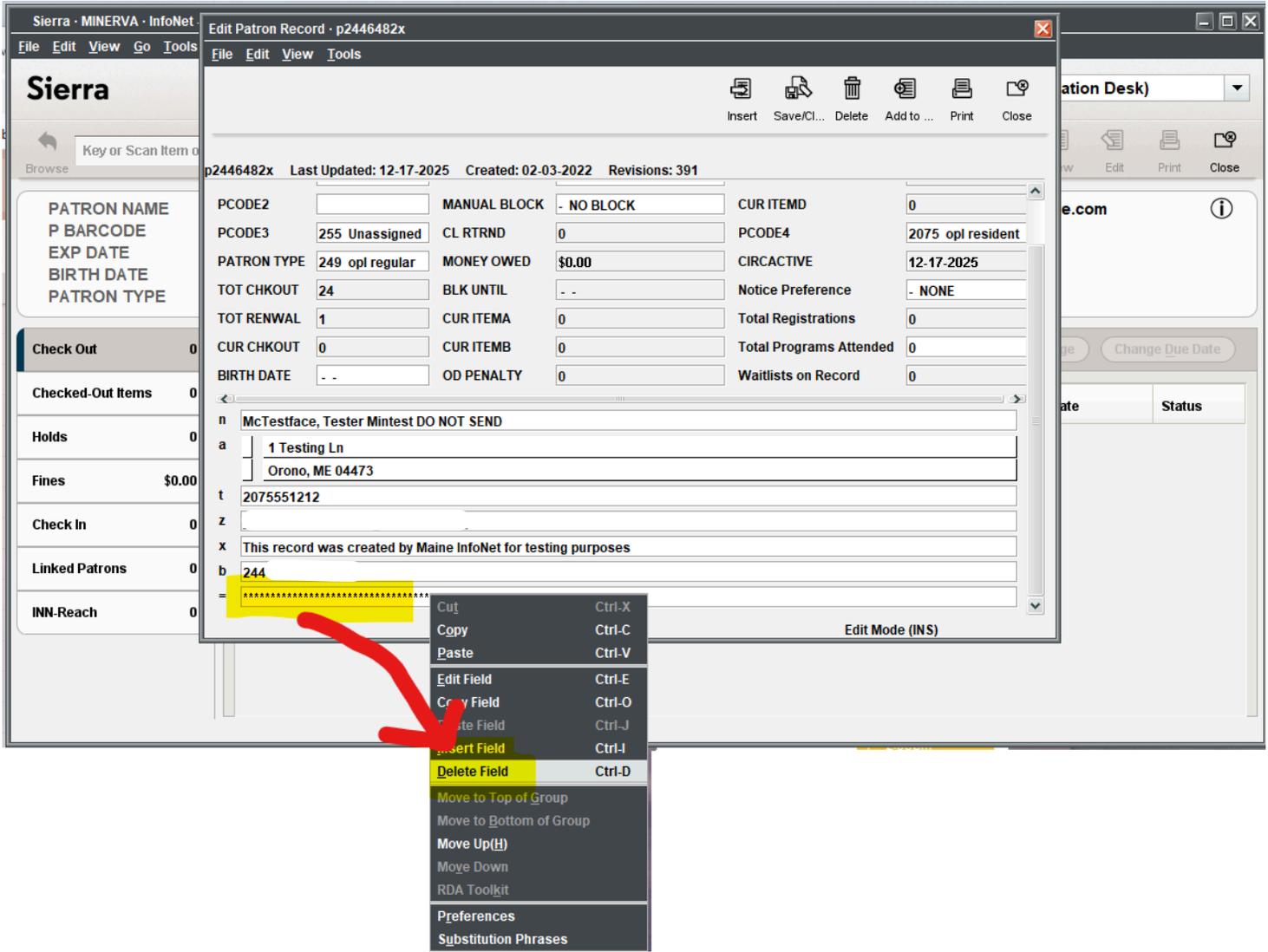
7) Click Save/Close and the record will be stored with the PIN.

### Deleting a PIN in a client record:

1) In the Sierra Client, open the patron record and click 'Edit'



2) Locate the = tagged PIN field and right-click on it - select 'Delete Field'



3) If your patron has a valid email address and wants to create their own PIN, click 'Save/Close' and they can now do so using the patron record functions in the webpac.

4) If your patron wants you to add a PIN for them, at this point staff can simply follow the instructions to Insert a new PIN as described above in [Adding a PIN to a patron record: Steps 2-7](#)