



Sierra Training: Lessons Learned

- 1 Initials and front desk workflow:** Users will not be able to switch between initials in the same way that the system is currently configured in Millennium. To switch between users **Sierra will need to be brought down entirely and then restarted with a new set of initials.** I am working on some possible solutions to help us mitigate any problems this may cause and as a veteran of frontline circ service; I know the problems that this causes. Circulation data is tied to initials so if you work in more than one branch or library it is **crucial** that you log into the initials assigned to the location you are working.
- 2 Mat Type Icons:** Currently in Sierra the material type icons do not match the bibliographic record. When we go live, the icons will be identical to those currently in place in the OPAC.
- 3 TNS Icon:** In the preview module the TNS icon to inspect a patron level telephone notification is missing. It will be active in Sierra when we launch.
- 4 Patron Fields:** When hovering over the circle i in the full patron display it does not include gender or stat class and there is some concern that those fields will not migrate. They will migrate however you will need to launch edit patron to view.
- 5 Brief Patron Display:** Unfortunately we will be unable to modify the data that currently displays in either the brief patron display or the full patron display when hovering over the circle i. This is an issue, especially with the brief patron display. Currently this is hard-coded into the software.
- 6 Linked Patrons:** We are requesting an enhancement to view all fines associated with patrons when viewing the view checkouts within the linked patrons feature. We expect to have it place when are live.
- 7 Limit Search:** In Millennium users are allowed the option to make a limited search apply to all searches or only the current search. In Sierra it is set to apply to all searches. Launch the limit and make sure to “clear” limits after performing your limited search.
- 8 “Available” in the brief bibliographic display:** This means that it is available somewhere within the system. If all items attached to a bibliographic record are checked out, the display reads Not Available. It would be nice if “Available” could be scoped to login but that isn’t how the software works.
- 9 Sierra Printing:** Printing receipts in Sierra is structured the same way as in Millennium with one major difference: before, receipts were set by module login, now they are set by individual initials. Please see the document:



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http://midhudson.org/resource/general/Sierra_User_Configuration.pdf to configure initials so that templates and receipts will behave in the same manner as in Millennium.