WELCOME TO
sierra

Sources:

http://csdirect.iii.com/sierrahelp/Default.htm

http://csdirect.iii.com/sierra/kb/

What's Different?

Unified Client:

All functions: cataloging, circulation, administration and acquisitions will be launched from one desktop icon or from your dashboard. After clicking on the desktop icon, the user will simply have to enter their username and password to access all the workflows and functions assigned to that login.

New Browse Display:

The new browse display will, allow the user to have more of an online catalog experience. The circle "i" will allow the user to see additional information about a bibliographic, item or patron record without opening the full record. Images have been included from books in the same way images display in the OPAC.

Sierra Dashboard:

See below

Circulation

After clicking on the Sierra Desktop Application (SDA), you will be allowed to perform all the functions that you were able to perform in circulation, cataloging and acquisitions:
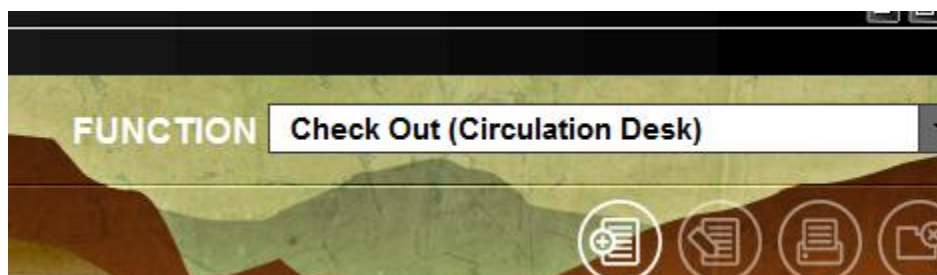

If you are using a shared computer, do not select "Remember me on this computer". Enter the initials you used to sign on, in the upper left corner will be a drop down menu to help you navigate across the functions you have been assigned with your initials:


### Access the Circulation Desk function and check out a book

Select the Circulation Desk function from the Function drop-down list or Go > Circulation > Circulation Desk.

Scan or key patron's barcode. If searching on a name you can use the "n" index in the barcode search box or select Tools > Search > Browse. Very similar to Millennium and should be easy to adjust to Sierra to check a book out:
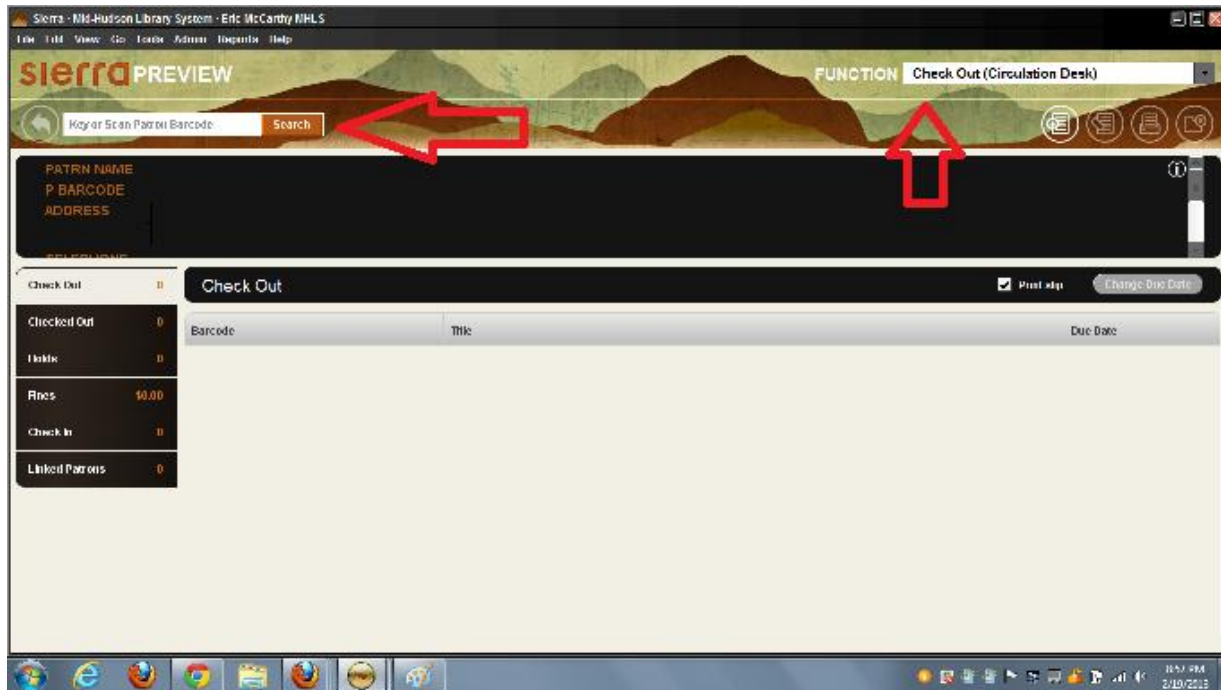
After entering the name or the barcode, you will see the patron information loaded:

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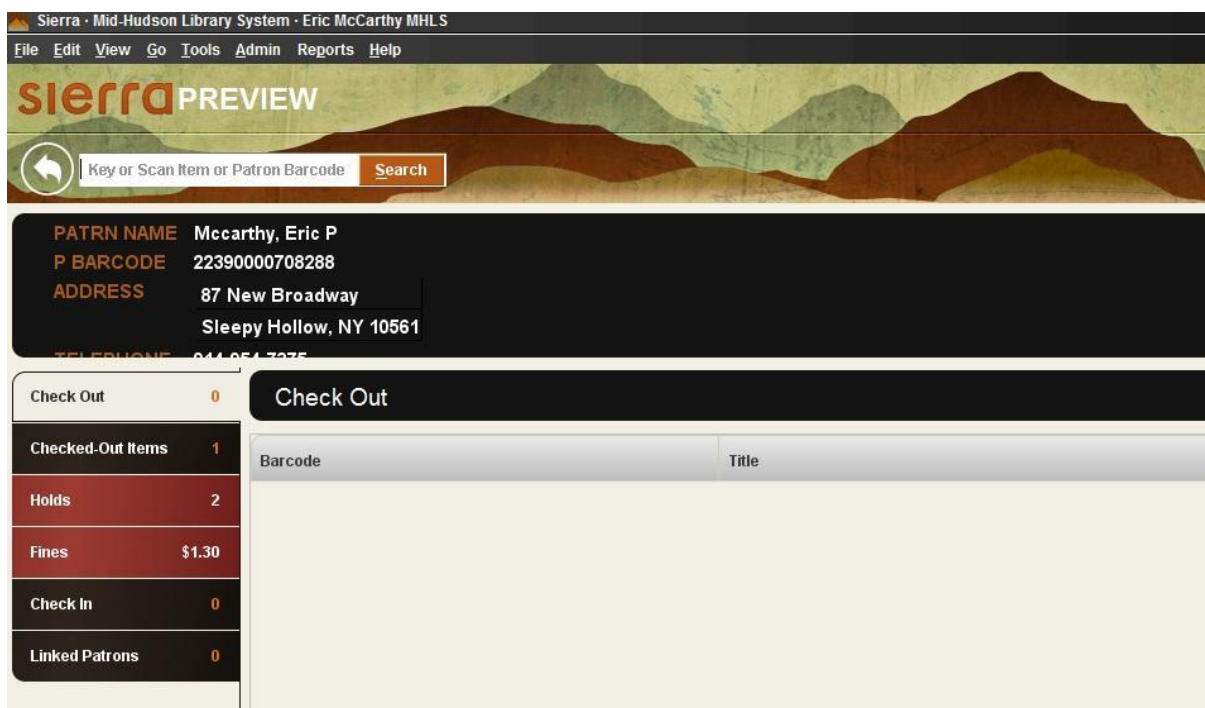
The circled "i" in the right hand corner of the brief patron screen, when selected, will display all other patron fields:
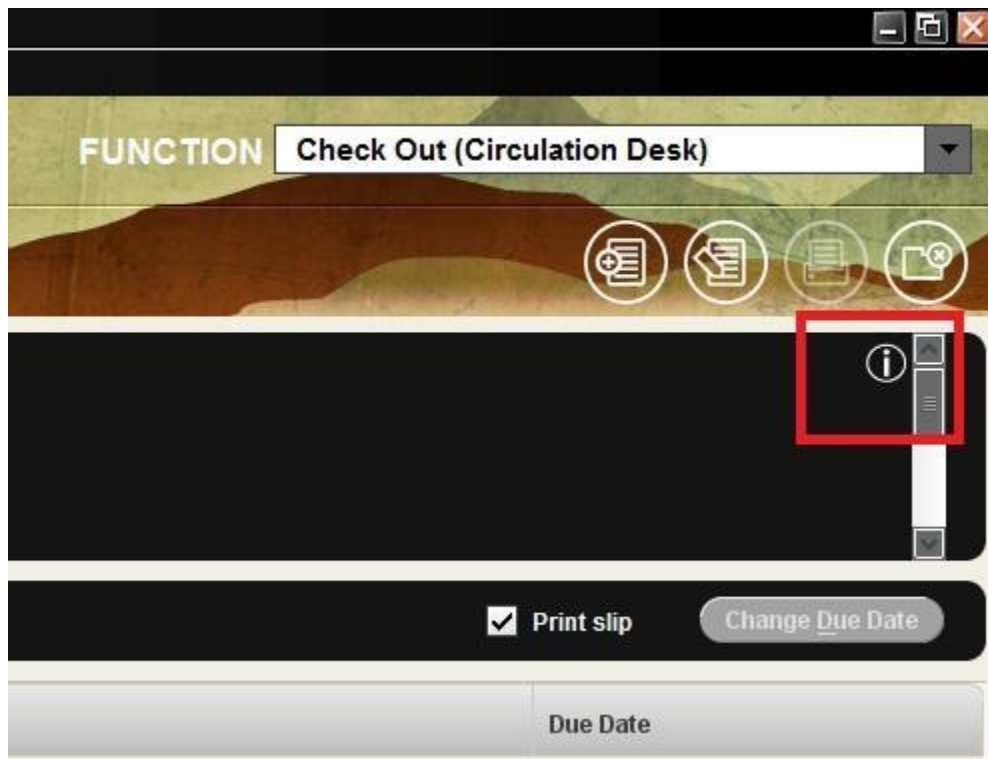
After bringing up the patron, you can now scan the book's barcode into the same field you scanned the barcode for the patron. This workflow mirrors that in Millennium.
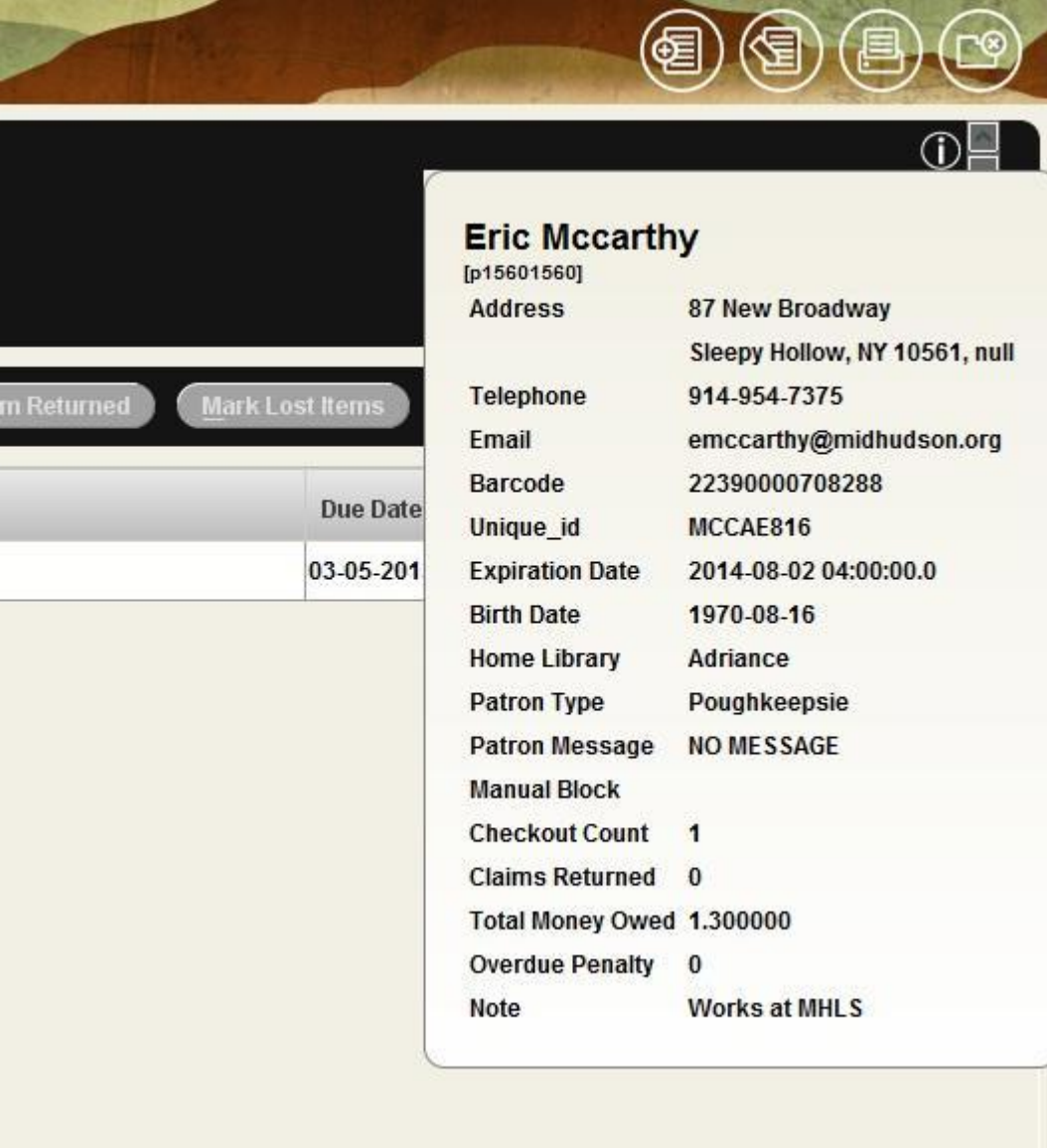
Navigating a patron record:

Notice from this tab you can also access all of the tabs that were accessible by the tabs that ran horizontally in Millennium. Here is where you link patrons, checkout items, add or delete holds, and pay fines.

To edit or view a full patron record, create a patron record, you will need to select the icon seen below, found just below the Functions drop-down menu:

the four icons (from left to right) that appear directly beneath the Function drop down menu are: New Patron, Edit Patron, Print Table and Close.

Sierra has added the ability to see an entire patron record by hovering over the circle i found in the upper right hand corner of the brief patron display window:

Renewing a book works in much the same way as Millennium. After bringing up the patron record, click on the tab labeled "Check Out", select the item(s) to renew and click renew:

Just like in Millennium you can renew, claim return, mark as lost or change the date due from this display screen.

Check In - No Patron:

There isn't preview access to this function. We expect it to work in the exact same way as Millennium. Instead of selecting the icon "Check In" as it appears in Millennium, select "Check-In (No Patron)" from your Function drop down menu:

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Notices

Accessing notices will depend on how each library had been configured. If they had saved the parameters of their notice setting choose Notices from the Function list. A table of saved notices should appear (this function has not been included in the preview app) and if you need to create a new notice, select the New icon. Currently we do not have preview access to notices, however, this is a screenshot from another library of the menu when creating a new notice:

This should all look familiar to the Millennium user. All templates will move over and the user will be prompted for a print template when using the email or print notice type. All template settings will be handled in the Admin | Settings function:

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Settings

Windows	Multiselection Groups	Web Master	Headings Reports

On-the-fly Records	Session Statistics	Create Lists	Claiming/Binding	Statistics

New Records	Import Invoice	Global Update	Record Display	Record Templates

Macros	Export Records	Search	Print Templates

Output Type Overdue Notice ▼   ☐ Use Print Templates

Preferred Templates

Other Templates

CLAOverdue	Overdue
CLDOverdue	Clintondale Overdue
HighlandOD	Highland Overdue
higoverdue	Highland Overdue
MLK	Overdue
PATOverdue	Overdue
WHOverdue	West Hurley
_Overdue	Default Overdue

Rename   Edit   Preview   Import   Export

Save Settings   OK   Cancel

Update a patron record

After selecting the patron in the Circulation Desk function you will need to select the icon for editing a patron record (see the entry on navigating a patron record). These screen should look familiar to Millennium users and all fixed length codes will be in place from Millennium. We are unable to see this screen in the Sierra preview app but here is an example from another library:

Millennium users should have no problem recognizing this screen. Edit both a variable length and fixed length field.

Linking Patrons

Linking patrons is done from the patron record by first selecting the linked patrons tab (see navigating a patron record) and then clicking the link button.

Create a New Patron Record

Both and icon and the "New Patron" option from the file menu will be available within the Circulation Desk function (see the navigating a patron record section).

Creating a new patron record will involve the same "wizard" template that was being used in Millennium.

All field restrictions (barcode and telephone number field length) should remain, fixed fields, PIN will be encrypted, and mandatory fields will remain in Sierra. Adding variable length fields can be done after the record has been created by choosing the Insert icon.

Merging Identical Patrons

Choose the Merge Duplicate Patron records from the Function drop-down list and enter the following information: source record number (the .i number) which will copy the data to the Destination record number. The source record number will be deleted after this process. Choose Merge Patrons and the system will check for any problems (the source record may have a request pending or an item on the holdshelf). Resolve the problem and complete the merge.

Cataloging

Attaching a New Item

The process for attaching will be exactly like attaching a new item in Millennium Cataloging. Item records can be creating in the Search/Holds function or the Cataloging/Catalog function. Search for the bibliographic record to attach the item, choose Item from the View drop down list in the Summary tab, choose Attach New Item and you may have to select a template if these are not scoped correctly or the wizard will launch automatically.

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Updating an Item Record

Retrieve the record to edit. Choose the edit button above the brief record display, make changes:
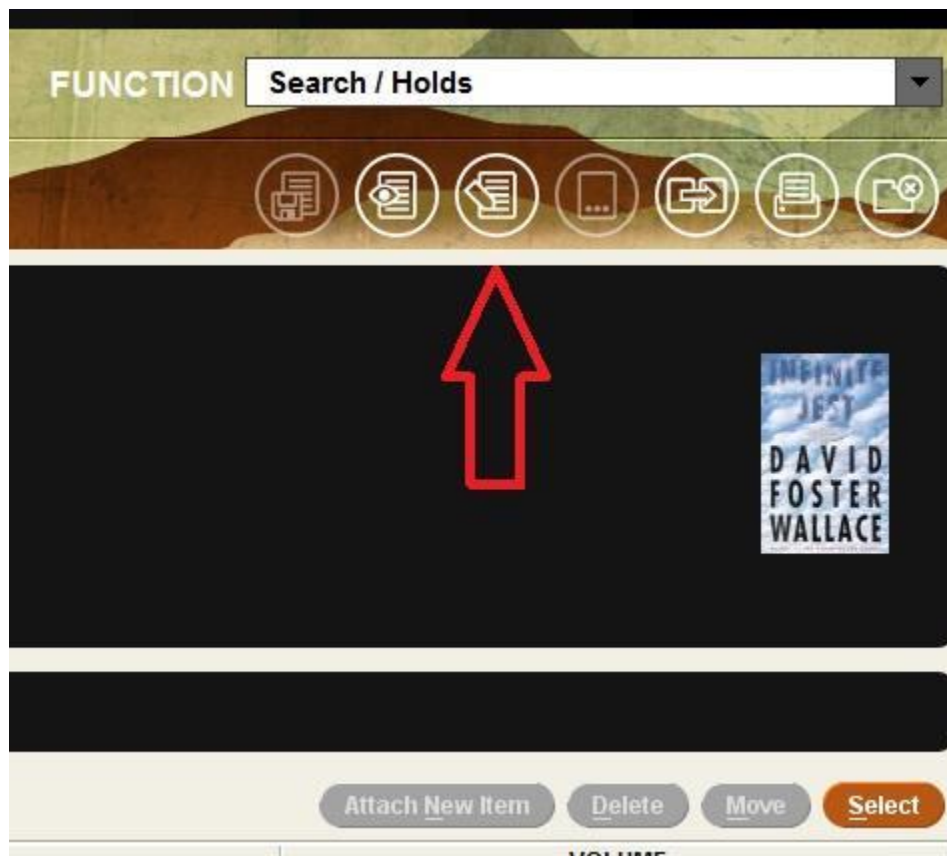
 You can choose Edit > Undo to cancel one of the last ten changes made to the record. Select Save from the toolbar prior to exiting the record.

After you have found a record, you can navigate and edit fixed and variable length fields by selecting the item in the Summary screen and selecting the "record" tab:

Once inside the record, you can click edit and make any changes necessary. An item record will look familiar to all users of Millennium:

Record

Edit

Checked out on 01-17-2013 14:20 to Goldstein, Irwin due on 02-14-2013
i25817115   Last Updated: 01-17-2013   Created: 04-19-2002   Revisions: 270

COPY #	1	INVDA	- -	LOCATION	beaa Beacon Adult	
ICODE1	0	IN LOC	772	LOANRULE	72	
ANNUAL RPT	a FICTION	# RENEWALS	0	STATUS	- DUE 02-14-2013	
I TYPE	0 Book	#OVDNOTICE	0	INTL USE	0	
PRICE	$29.95	ODUE DATE	- -	COPY USE	0	
OUT DATE	01-17-2013 02:20PM	IUSE3	0	IMESSAGE	- NO MESSAGE	
OUT LOC	772	RECAL DATE	- -	OPACMSG	- ---	
DUE DATE	02-14-2013	TOT CHKOUT	50	YTDCIRC	1	
PATRON#	1255068	TOT RENEW	16	LYRCIRC	4	
LPATRON	1322562	LOUTDATE	09-26-2012 03:39PM	AGENCY	0	
LCHKIN	01-12-2013					
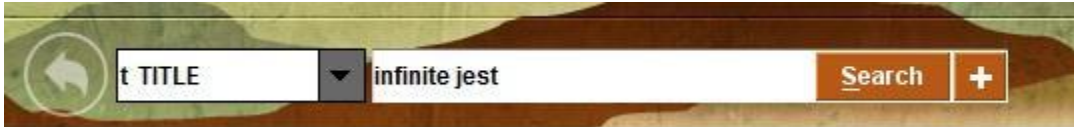
CALL #	092	Fic Wallace
BARCODE		3 2912 00052 9493
ENTERED BY		bea-am

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Search/Holds

Sierra carries over this function from Millennium and is the primary way to search the catalog and place a hold from a bibliographic browse. Select Search/Holds from the Functions drop down menu. Select the index you would like to search the catalog and enter your search terms:

The plus box to the right of the search box will allow you to place limits on your search. This works much the same way that "limit" worked in Millennium.

The results screen is where Sierra has made some great improvements. Depending on your search you'll notice a set of scoped results along the left hand side of your window:

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Here, you can very quickly narrow your search based on Format, Language, and Location. Very helpful to quickly determine if your library is currently holding a title within your results list.

Also the results list will incorporate book cover images we currently purchase from Syndetics and you will notice the circle i (work like in the patron record) from each entry can be clicked on to reveal the entire bibliographic record:

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Select

	Summary	Preview
ⓘ	b20337681 Available 1 Item	boston noir
ⓘ	b14407036 Available 11 Items	DAVID FOSTER WALLACE

Infinite jest : a novel
[b14407036]

|	
Material Type	Book
Year of Publication	1995
Title	Infinite jest : a novel
Country	Massachusetts
Language	English
Catalog Date	2002-02-01 00:00:00.0
Available	true
Item Links	11
Author	Wallace, David Foster.
Publisher	Boston, MA :
Description	1079 p. : ill. ; 24 cm.

Print Settings

Date Due Slips

Many of the functions currently accessible from the File Menu in Millennium will continue to be accessible from the File Menu in Sierra including accessing the Print Settings. Print jobs are continued to be set to either the email or receipt when printing "date due" slips. The print setting will be based on login so MHLS will need to configure this to make sure that settings are correct. Unfortunately we cannot test the receipt printer in a live checkout environment you can check to see if your receipt printer is working correctly by using the print table function from a patron record:

Note: For this option to be able to work, you must have something either in holds, or checked out to print.

You may need to make some adjustments to your receipt printer settings which can be accessed at file > print settings > receipt printer:
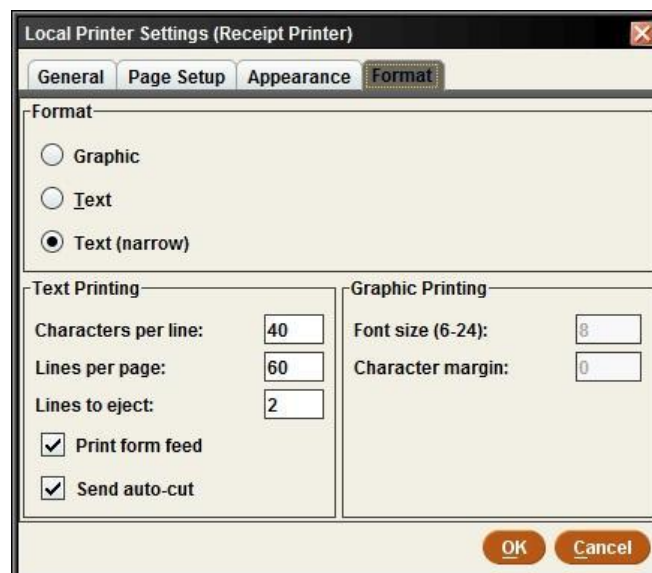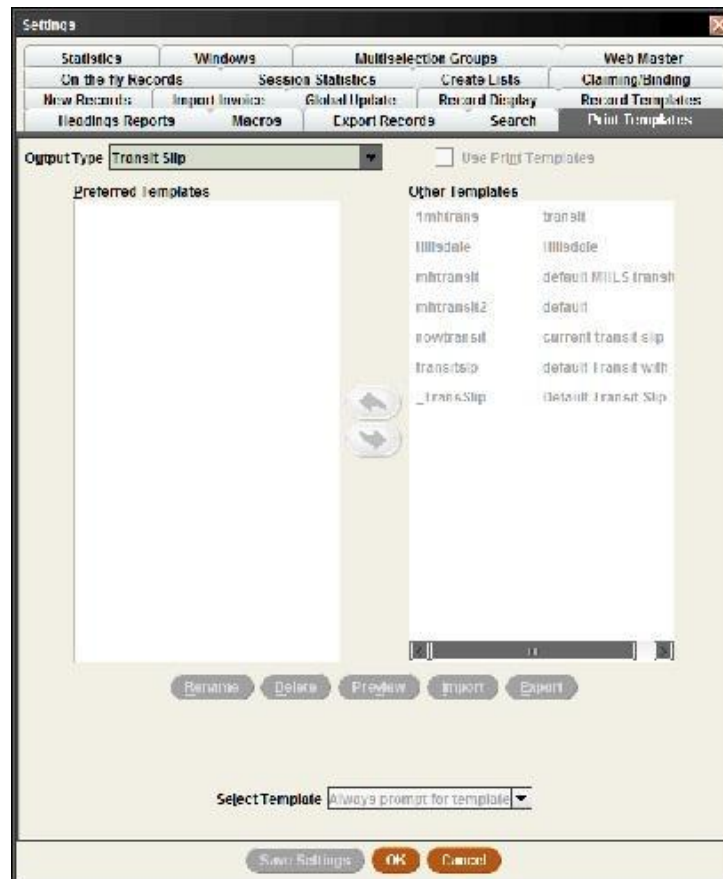

This should look familiar to Millennium users. If you have any questions regarding your printer settings, please call MHLS Tech Support.

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Print Templates

These will be all included in the template library but are likely not set to your initials. You can set your own print templates by selecting Admin > Settings > Print Templates tab:

Troubleshooting

Restarting a Session

If the system gets hung up, ask them to check the DOS Java window and look for anything that says "error", ask them to copy that line and send it directly to us and we will report it to Innovative. If Millennium crashes, this will need to be reported to Millennium with the exact series of steps leading to the crash.

Freeing Records in Use

Only order and invoice records can be busy in Sierra. Will no longer be an issue in circulation.

All Ports in Use

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When using the Sierra preview app, you will be using one of your library licenses. Keep this in mind if you receive an all ports in use message.

Sierra Dashboard

sierra
DASHBOARD

Welcome, please sign in

The Sierra Dashboard is a Web interface (available to all users at http://midhudsonlibraries.org/sierra/dashboard) that allows you to launch Sierra and assorted other widgets. For Innovative and Mid-Hudson Libraries this is very much a work in progress and may not appear useful now, although as we are able to source more widgets (and maybe create our own, calling any coders) this could be a helpful customizable location for all ILS uses. To create your customized page select " Add a page" and then "Add a gadget". After selecting "Add a gadget" you can select the Sierra Desktop App. Once your app is loaded on your machine, you can then launch Sierra from this page.