



Sierra Initials: Migration Checklist

	Configure Print Templates
	Configure Printer Settings
	Configure New Records
	Configure Macros

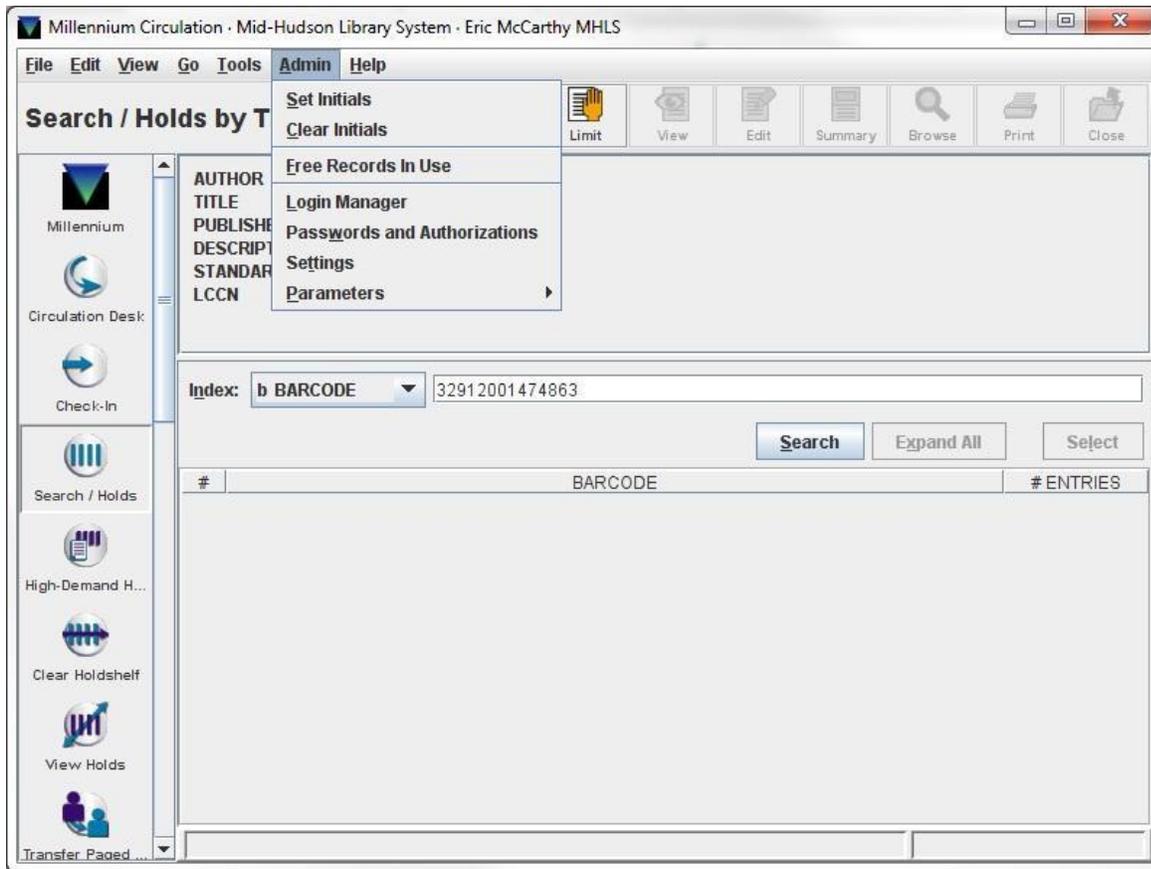
Each and every Sierra user will have to configure some individual preferences relate to their login prior to going live. Some of these configurations will make the transitions smoother (making sure that your new record “wizards” are set correctly) others are absolutely essential to running the circulation desk. The best policy is to allow 15 or 20 minutes for each employee to configure their initials on the “go live” day prior to circulating materials signed in under their initials. Checking current settings should be done prior to migration because you will be uninstalling your Millennium client after the 23rd.

Print Templates

Prior to Migration

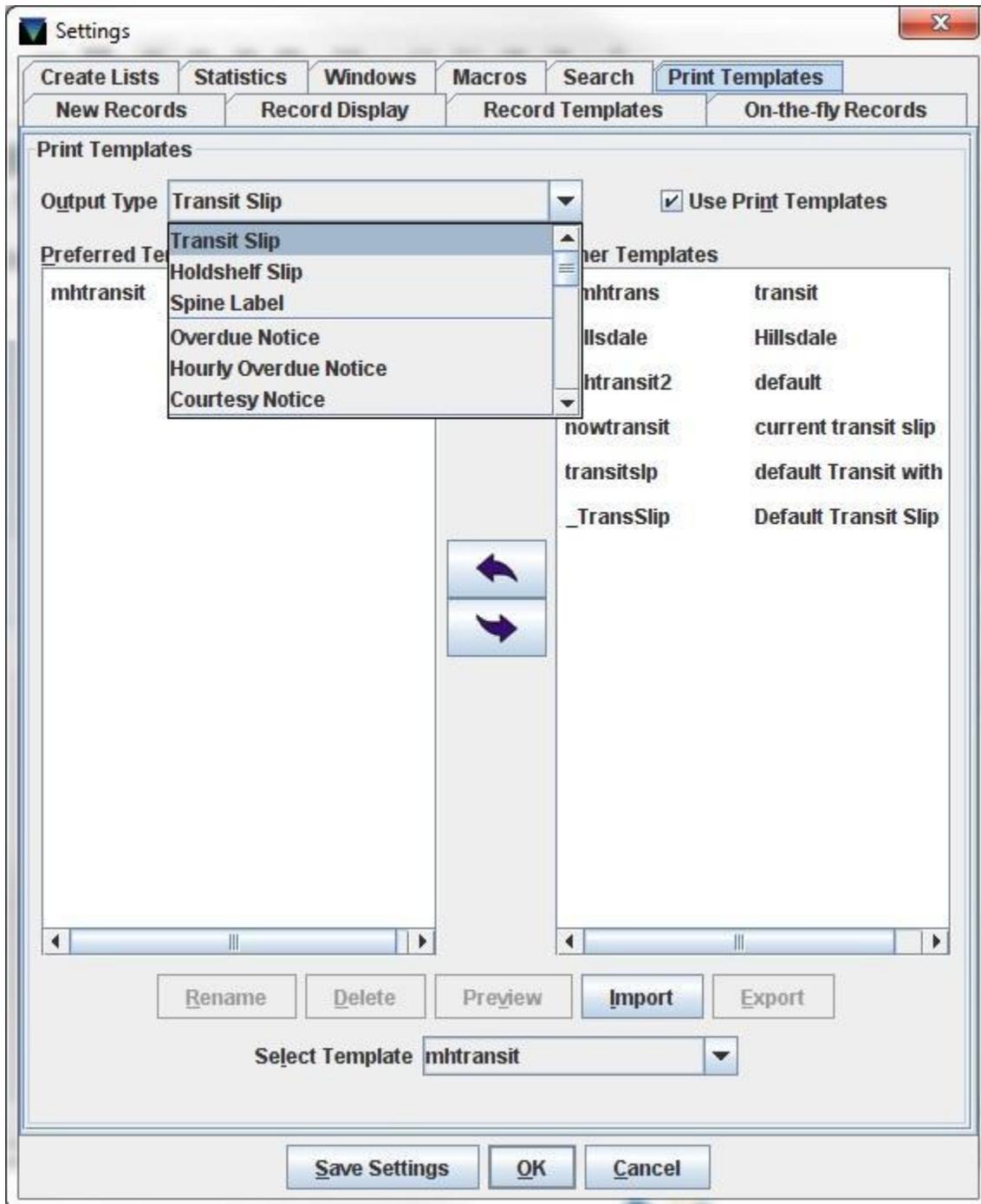
Check to see which templates you are currently using in Millennium.

Select Admin > Settings



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From the settings display, select the tab “Print Templates”



Here you will find the templates associated with your site location. Select from the templates in the dropdown and if the box is checked (“Use Print Templates”) then look at the “Select Template” box towards the bottom and take note of this. In this case the template selected for transit slips is mhtransit

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-- the template most of you are using for transit slips. TNS notices are automated to run every morning so you don't have to worry about those. You only need to check for the templates that you are currently using. Some common custom templates will be found here:

Transit Slip

Holdshelf Slip

Overdue Notice

Item Page List

Title Page List

Hold Pickup Notice

Hold Cancellation Notice

Pickup and Cancellation Notice

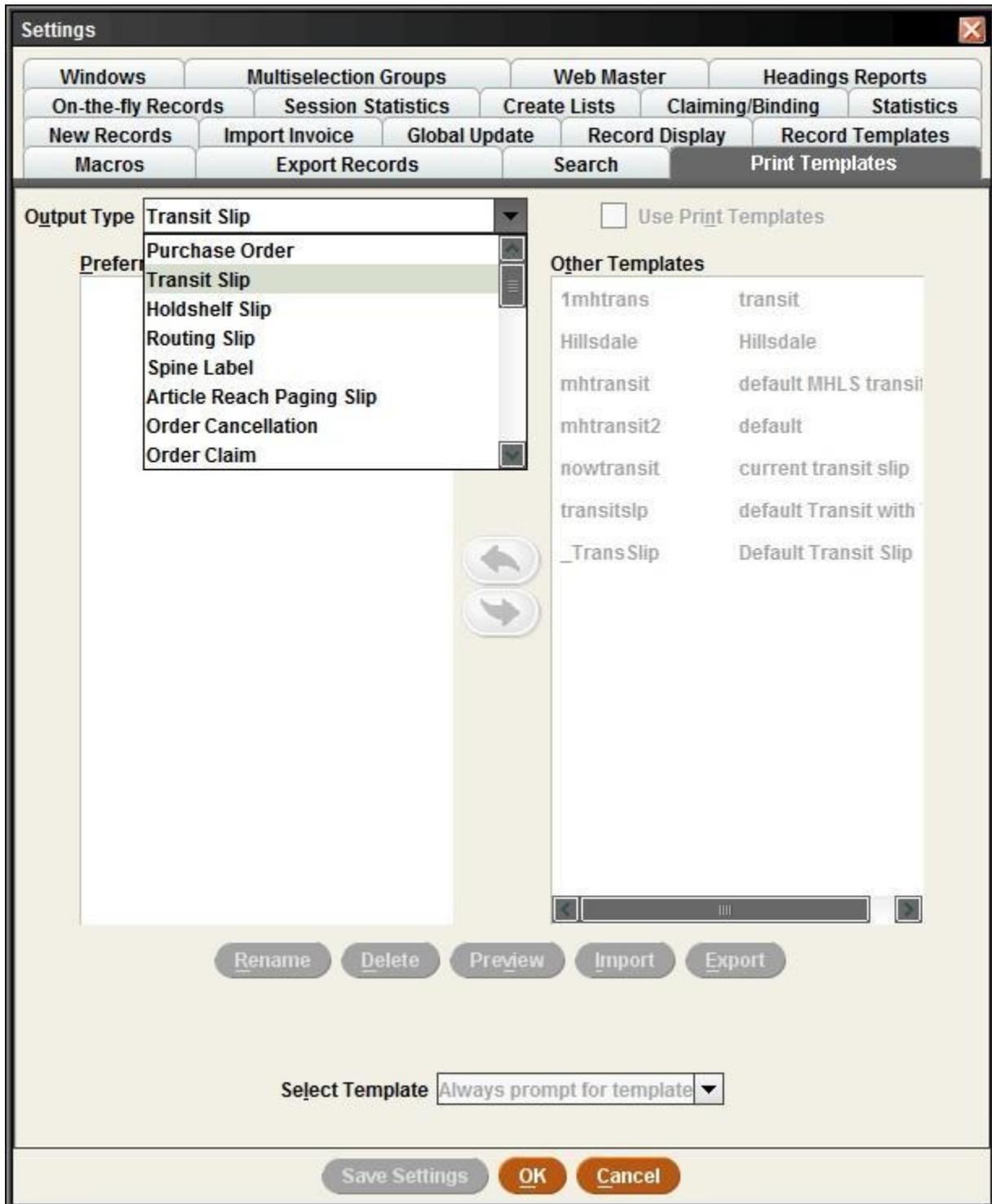
Bills Notice

After Migration

After you have taken note of each of the notices you will need to configure these in Sierra, you can now open Sierra and begin to select your preferred notice settings. Open Sierra and select Admin > Settings:



From the settings display, select the tab "Print Templates":



The screenshot shows the 'Settings' dialog box with the following components:

- Navigation Tabs:** 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:** A dropdown menu currently showing 'Transit Slip'. Other options include Purchase Order, Holdshelf Slip, Routing Slip, Spine Label, Article Reach Paging Slip, Order Cancellation, and Order Claim.
- Use Print Templates:** An unchecked checkbox.
- Other Templates:** A list of templates with their corresponding names:

1mhtrans	transit
Hillsdale	Hillsdale
mhtransit	default MHL S transit
mhtransit2	default
nowtransit	current transit slip
transitslp	default Transit with
_TransSlip	Default Transit Slip
- Actions:** Buttons for Rename, Delete, Preview, Import, and Export.
- Select Template:** A dropdown menu currently set to 'Always prompt for template'.
- Bottom Buttons:** Save Settings, OK, and Cancel.

Select the output type for all of the print templates that you took note of in Millennium. In the above example you would select mhtransit at the "Select Template" dropdown after checking the box "Use

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Print Template". You can move the transit to the Preferred Templates window although this step is not necessary. Repeat this for each and every template that you use.

Printer Settings

For each user you will need to make sure that receipt printers and standard printers have been configured. You will not need to look at your printer settings prior to migration however it might help on the first day after migration because the location of the settings here are in the same location as in Sierra.

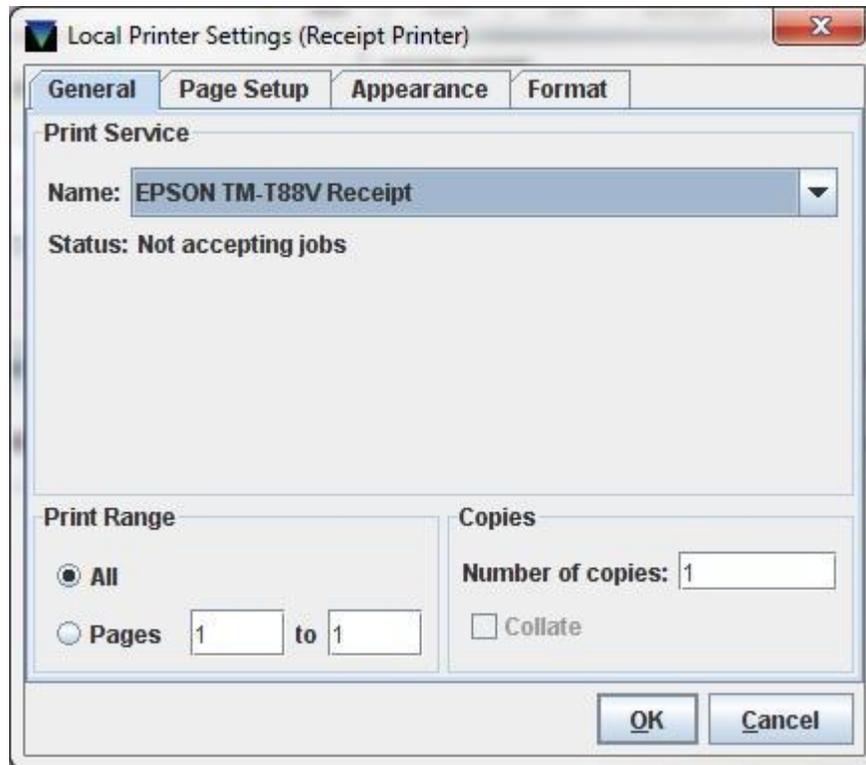
Prior to Migration

Log into Millennium and select File > Select Printer > Local Printer:

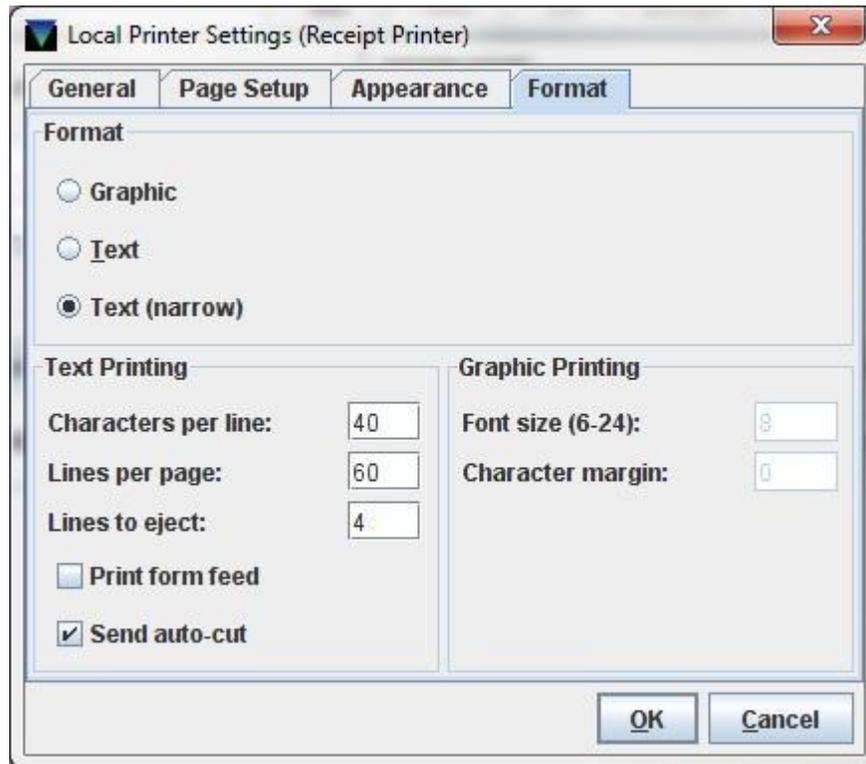


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After selecting the local printer take note of the printer name for receipts currently being used:



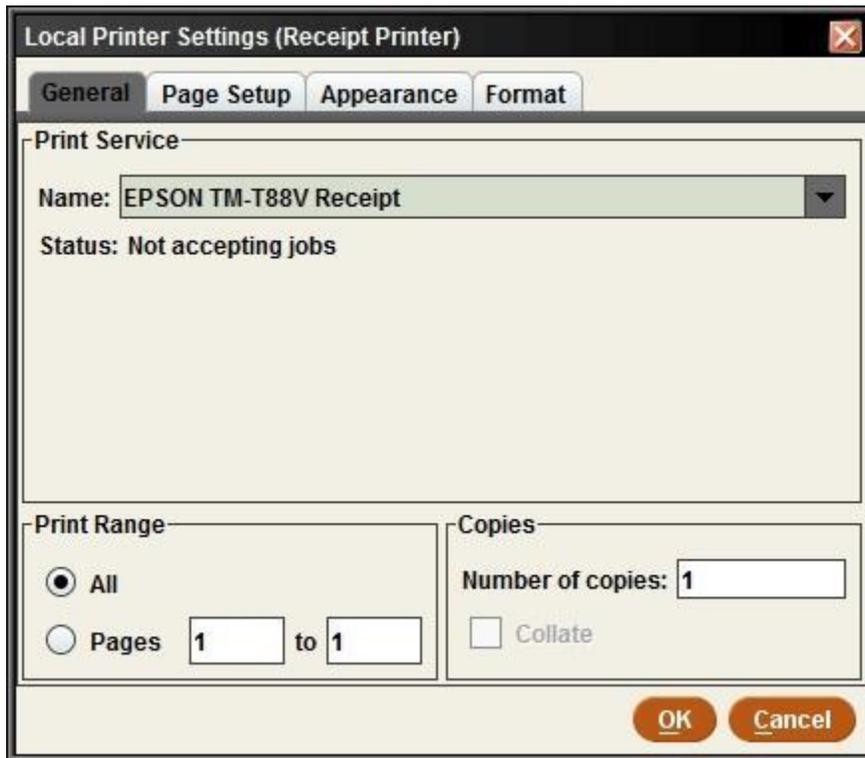
And then select the format tab and make note of the settings currently in place here, these settings will be exactly the same in Sierra:



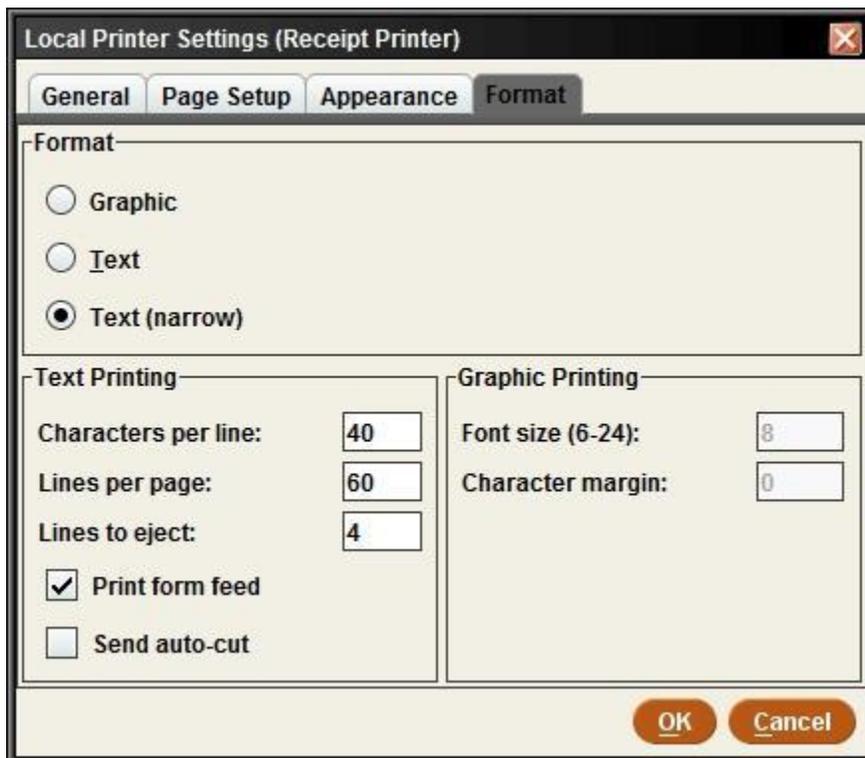
Notice that Text (narrow) is selected, lines to eject is 4 and the Send auto-cut selection is checked. This is a common configuration.

After the Migration

Launch Sierra, select File > Select Printer > Receipt Printer (Or Local Printer)



Select the format tab:



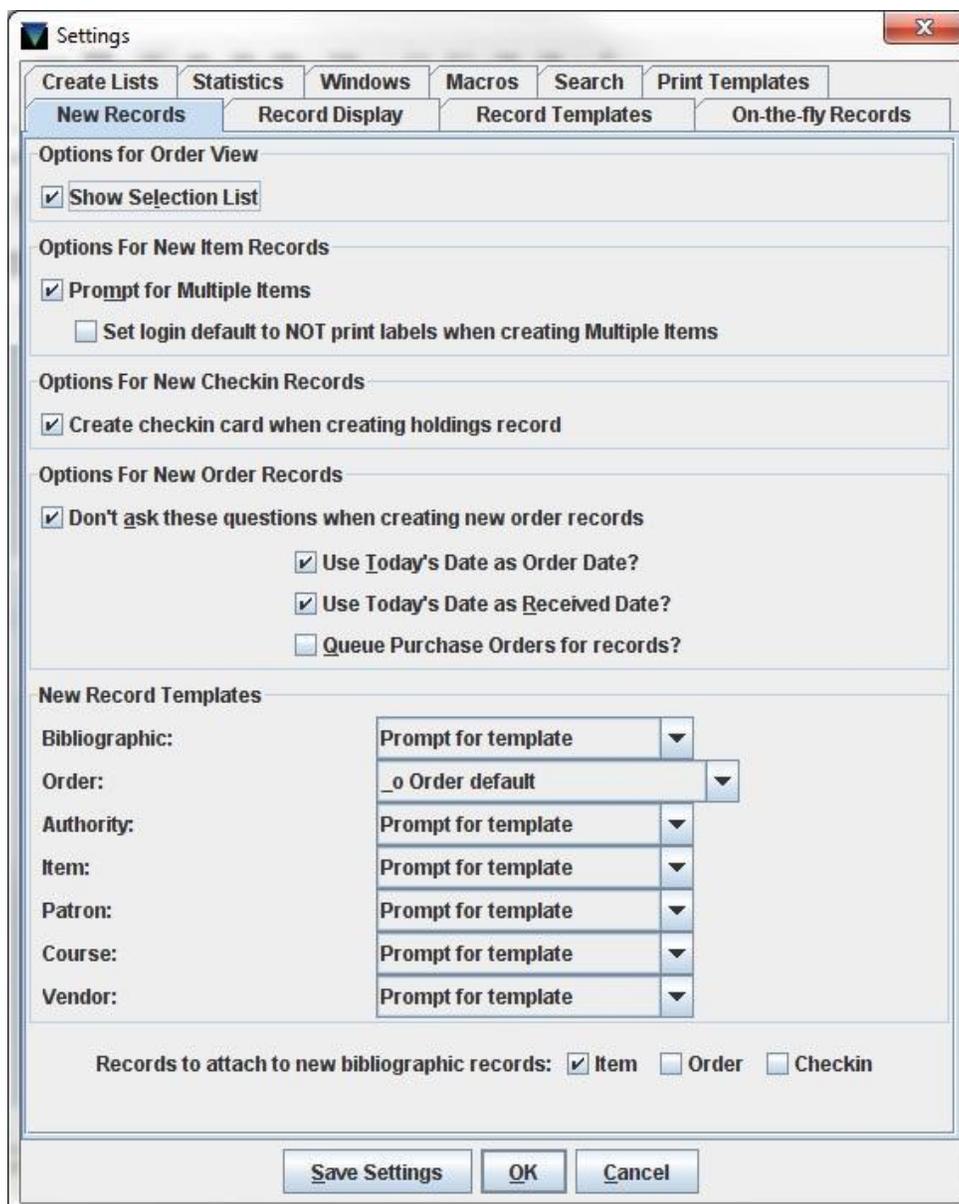
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When printing to a standard printer, your defaults should work. If we need to make an adjustment after the “go live” day, we will have updated documentation at that point.

New Records

Prior to Migration

Each time that you create a new record (item, bibliographic or patron) you either select a pre-existing template or a series of prompts automatically appear. For those prompts to automatically appear, check your new record tab in settings and see which template you are using:



Settings

Create Lists Statistics Windows Macros Search Print Templates

New Records Record Display Record Templates On-the-fly Records

Options for Order View

Show Selection List

Options For New Item Records

Prompt for Multiple Items

Set login default to NOT print labels when creating Multiple Items

Options For New Checkin Records

Create checkin card when creating holdings record

Options For New Order Records

Don't ask these questions when creating new order records

Use Today's Date as Order Date?

Use Today's Date as Received Date?

Queue Purchase Orders for records?

New Record Templates

Bibliographic: Prompt for template

Order: _o Order default

Authority: Prompt for template

Item: Prompt for template

Patron: Prompt for template

Course: Prompt for template

Vendor: Prompt for template

Records to attach to new bibliographic records: Item Order Checkin

Save Settings OK Cancel

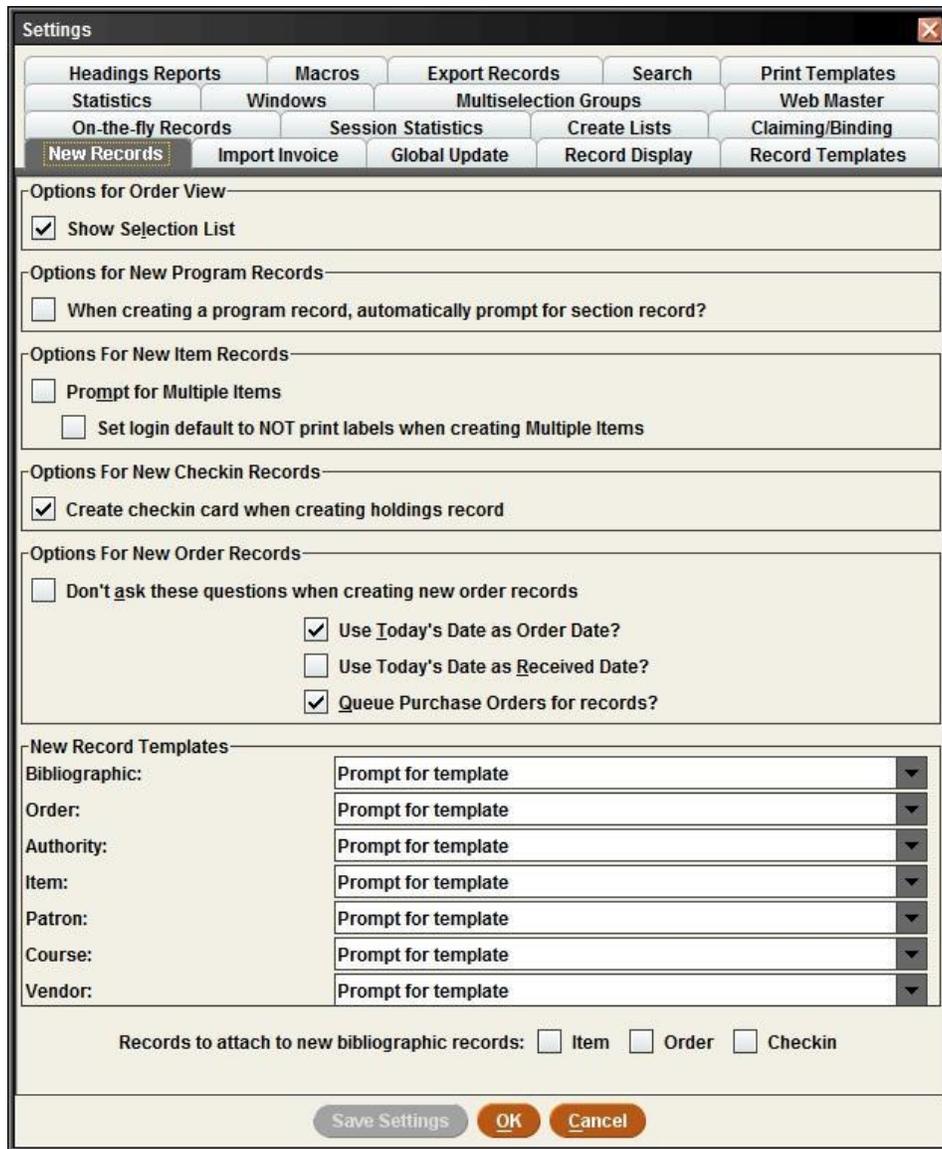
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After Migration

In the example above, the only pre-existing template is for new order records. So in Sierra the only new record pre-existing template I would need to select is for order records. To do this, in Sierra select Admin > Settings:



Admin should launch on the new records tab:



Use the dropdown to select the templates that had been set in Millennium.



Macros and shortcuts

Macros, like new records, can be customized to each individual login. You may be using Macros in which case follow the above instructions for new records except copy your Macros by accessing Admin > Settings and selecting the Macros tab.

Some useful Macros (and keyboard shortcuts) for Circulation:

Function	Keyboard Shortcut	Macro
Close Sierra	Alt+f+x	%ALT+f%x
Launch Circulation Desk (Check-Out)	Alt+g+u+d	%ALT+g%u%d
Launch Check-In (No Patron)	Alt+g+u+c	%ALT+g%u%c
Launch Notices	Alt+g+u+t	%ALT+g%u%t
New Patron	Alt+f+n	%ALT+f%n
Search/Holds	Alt+g+u+h	%ALT+g%u%h
Catalog		%ALT+g%c%g
Receive		%ALT+g%a%r

If you are using a helpful macro, feel free to share it on the Millennium listserv. Please call with any questions or comments.