Tips & Tricks for Sierra Sanity

Advice from a 30 year Innovative Veteran

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A few months ago, as I was preparing this presentation, I sent out a call to the Users Group asking for your favorite tips and tricks. I have been collecting these tidbits through the years and they have saved me much time and many tears. Since this is my final IUG presentation, I wanted to pass these along to you so that you, too, can work more efficiently. Throughout the presentation, you will see small blue boxes that will point you to the correct search in the Sierra manual for further information. There are also some orange boxes along the way giving shout-outs to those users who submitted their tips and tricks for this presentation.

General Settings
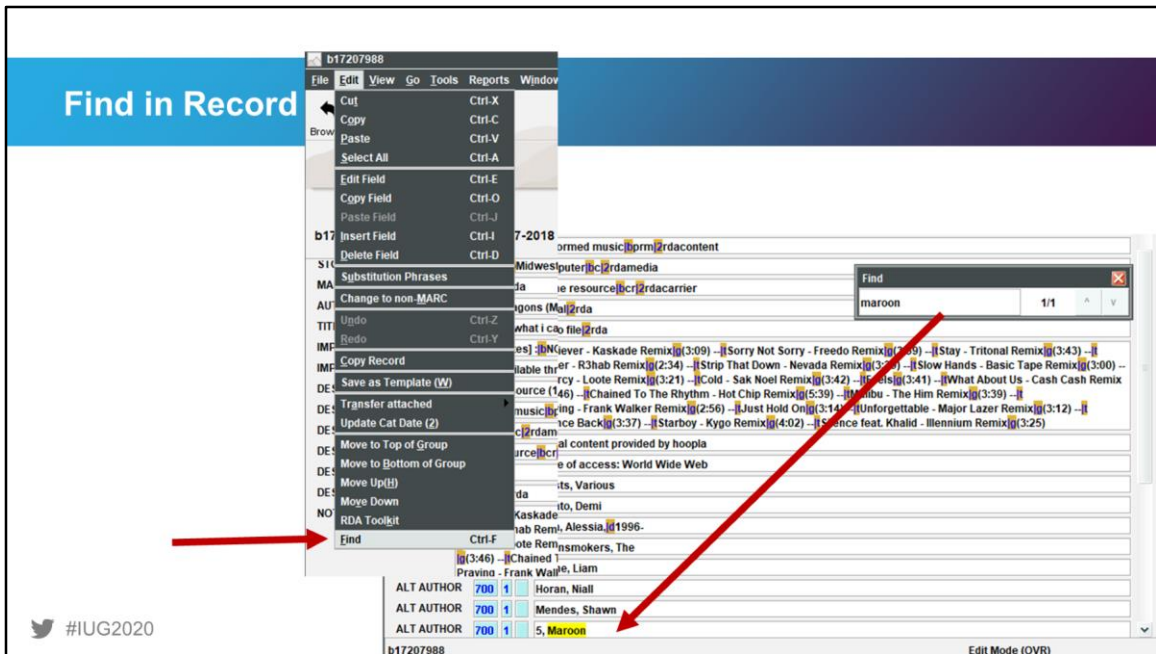
Have you ever encountered a really long contents note or one of those dreaded DVD records that goes on for days? You have one word or phrase that you need to edit, but you're bleary-eyed after editing for hours and just need a little help to find what you need? There is a Find option just like you find in Word, Excel, or any web-browser.

 From the Edit menu, select Find or press Ctrl-F. A Find box pops up where you can enter the word or phrase you want to find. It will highlight the first occurrence and tell you how many total occurrences appear in the record.
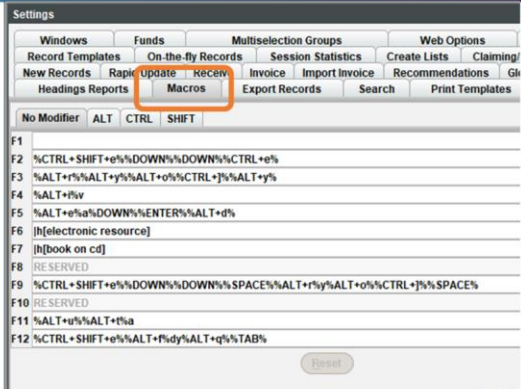
Macros are available for those repetitive tasks that often involve many key strokes or clicks. You can program up to 43 macros using the function keys alone or in conjunction with the ALT, CTRL, or SHIFT keys and they stay with the user, not the computer. Here are some that I have on my login to handle routine edits such as long GMDs that could be easily mistyped. You can program in spaces, arrow keys, and the return key along with command keys.

Macros to Enter Frequently Used Tables

➢ To access Rule Determiner Table:
%ALT+a%p%i%u

➢ To access Loan Rule Table:
%ALT+a%p%i%r

Thanks to Kathy Setter!

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Kathy Setter submitted these helpful macros if you need to edit a lot of loan rules at one time. Use the % sign in front and behind special character combinations so that letters are not misinterpreted.

Longest Macro I've Seen

➢ %TAB%%TAB%%CTRL+v%%HOME%%SHIFT+RIGHT%
%SHIFT+RIGHT%%SHIFT+RIGHT%%SHIFT+RIGHT%
%SHIFT+RIGHT%%CTRL+x%%SHIFT+TAB%%SHIFT+
TAB%%CTRL+v%%TAB%3%TAB%%TAB%false%TAB%
%ALT+s%

Thanks to Bob Gaydos!

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And this submission from Bob Gaydos has to be one of the longest macros out there. Bob designed this one to cut and paste data when editing. As he stated, "A macro cannot operate across forms or dialog boxes, but I have been able to jam quite a few keyboard moves in there."
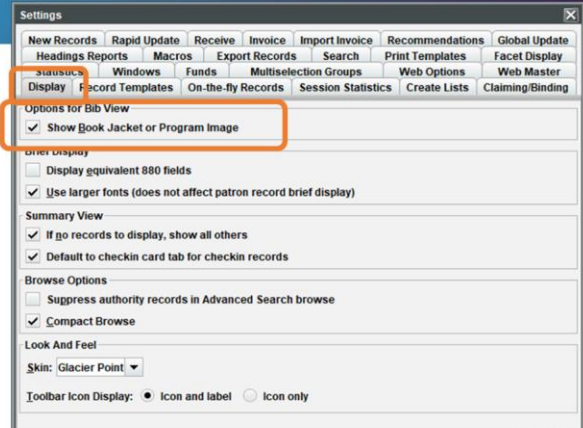
It's easy to get stuck in a rut with your display. There are many display settings that you can tweak to make your editing experience more rewarding for the type of editing you need to do.
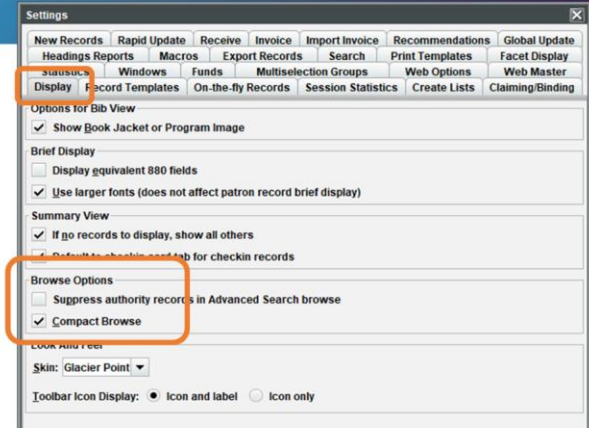
One that has been discussed a lot in recent months revolves around book jackets. If you are having problems with your supplier of images, you may want to turn this option off temporarily so Sierra responds more quickly. If you have a circulation staff member who can't see the images, you may have forgotten to turn this on when setting up their account.

Another display option that any serious cataloger, especially one who deals with authority records, should use is Compact Browse. I use this display extensively, but my copy catalogers do not. They like to see the book jackets and I just want to see the headings.

Compact Browse Book Jackets

Here is a side-by-side comparison of a compact browse screen on the left and the standard browse screen on the right. On the compact browse screen, you only see the jacket for the selected record whereas the standard browse displays the jackets of all the entries, along with the material type icon.

Compact Browse Authorities

As for authority records, with compact browse, it is easy to glance through the names listed, see how many entries match, and distinguish the authority records from the bibs. We also get a list of the titles associated with the author in the search. With the standard browse, it is not clear how many entries match the heading since each is on its own line. Although the Source column shows where the entry is within the record (a100 for authority name, b100 for bib author), there aren't any other details to help distinguish the entries in the list.

System Admin

Case of the Disappearing SDA

➤ Problem: SDA "opens" but can't be seen on the screen
➤ Solution:
1. Hover over taskbar icon
2. When preview appears, right-click on preview window
3. Select Move
4. The SDA should now move onto the screen

➤ Or, try Cascade the Windows
1. Right-click on the task bar and choose Cascade Windows

#IUG2020 Thanks to Craig Bowman and Ann Mroczenski, via Sierra List!

Have you ever had this happen to you? You start Sierra but nothing shows on the screen. Somehow it has reached the end of the Internet and has fallen off the screen. Two solutions that date back to 2015 come from Craig Bowman and Ann Mroczenski. They suggested a couple of task bar options to move the screen from the pop-up preview or to select cascade windows when right-clicking on an empty spot on the task bar.

Upgrading/Migrating the System

➢Block off the entire day as BUSY
  ➢Karen's note: this includes putting phone on DND and closing your door
➢Test, test, test
➢Open tickets (pessimist)
➢Close ticket (optimist)
➢Bring donuts

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Thanks to Beth Juhl!

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Beth Juhl offers some Sierra sanity options for the day you upgrade or migrate your system. First, block off the entire day as being busy so people leave you alone. If that doesn't work, I've added putting your phone on do not disturb and closing your door. You should plan to do a lot of testing and know that you will need to open many tickets that you will hopefully get to close quickly. And when all else fails … bring donuts.

Find the Bugs

➢Encourage staff to report bugs
➢Reward them by giving them a bug in return
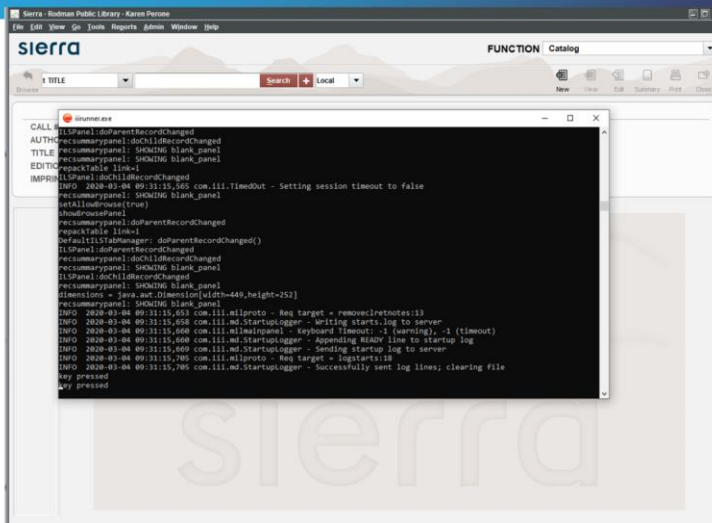➢Have a contest to see who has the best bug collection

Thanks to Beth Juhl!

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Who says systems work has to be dull and tedious? Beth also has a good attitude about getting staff involved with checking things on the system by encouraging them to report bugs that they find. She will then reward them with a small plastic bug of some kind. It has become a coveted race to see who has the best bug collection on staff.

Remember that Millennium black box that always seemed to be there and in the way? Did you miss it when you upgraded to Sierra? Well, that black box lets you know there is some life in the background when it sometimes seems like a response is taking forever. It is still there and waiting for you to turn it on. It is also helpful to have the Java dialogs that may have been recorded just before the system froze on you or crashed. Think of it as the "black box recorder" of Sierra.

Add "console" to iiirunner.lax

Thanks to Jeremy Goldstein!

To set up the Java console, go to your Sierra installation folder (generally C:\Sierra Desktop App on Windows computers) and edit the iiirunner.lax file. Search for console and add the word console to the end of the commands that you see here. If you want to record to a file instead of to the screen, use a file save path instead. And even though he says he can't take credit for this tip, I thank Jeremy Goldstein for reminding me of it.

In case you are wondering about the image on the screen, "That Damn Printer" was the name of an early IUG program that was videotaped (yes, back before there were smart phones and VHS was king) featuring two Innovative staff members recreating a typical helpdesk phone call involving printers. Things haven't changed much in 25 years and printers are still a problem.

Part of the problem with Sierra is trying to figure out which printer is going to be used to print the job in question. To figure this out, Alison Pruntel offers these suggestions: bib, item, order, and patron records all use the standard printer. Patron checkouts, holds, and fines use the receipt printer. But when in doubt, hover over the print button to see which printer is going to be used.
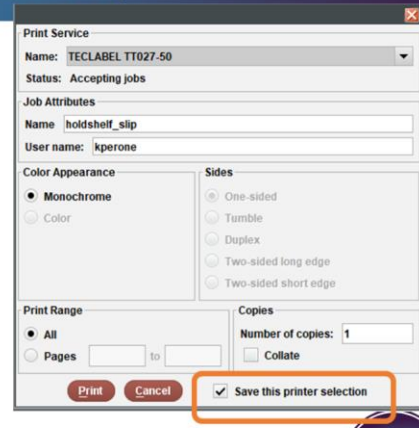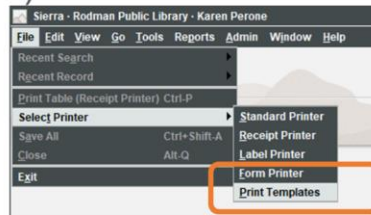
But wait, there's more! You may also be using a print template, which is really a virtual printer. You may have selected the correct printer, but you still need to select the print templates option and check the Save the printer selection to get the results to print out properly.

Location Codes

➢ Adding new locations
  https://csdirect.iii.com/documentation/addabranch.shtml

➢ Deleting old locations
  https://innovativeusers.org/list/archives/2014/msg01119.html

➢ Always restart session to see changes

Sierra Web Help
Search for: **Adding Location Codes**
Deleting Location Codes

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Adding and deleting location codes are always a challenge. Whenever I need to change location codes, I have these resources at hand because of the many tables that are affected by adding or deleting just one code. When you add any new location to the branch table, remember to restart Sierra to continue with the other table edits. Never delete a location code from the branch table until you are sure that code is not in use anywhere on your system. Just as you start the add process with adding the location to the branch table, the location is removed from the branch table as your final step.

Use a Powerful Text Editor

➤Notepad++
➤UltraEdit
➤Sublime Text
  ➤Great for:
    ➤Regular expressions
    ➤Column-based editing
    ➤Sorting
    ➤Deduping
    ➤Trimming trailing spaces

Thanks to Bob Gaydos!

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Bob Gaydos suggests that any Sierra administration who is not using a powerful text editor is no doubt making extra work for themselves. These are his suggested editors of choice for manipulating data into submission and the types of edits that he does on a regular basis.

To show the power of these editing tools, Bob sent me this example of adding up to 200 new item location codes to his system for a new branch. On the left is the locations served table for a new branch. On the right is the preparation for adding these new codes by using a text editor to manipulate the exported list of location codes from another branch. Along with changing the branch prefix for each of the codes, he also Prepends each with an "A" for ADD an entry. Admin Corner uses Linux so Windows-based text editors will not work properly. Use one of the Unix text editors mentioned on the previous slide.

Create Lists

Shortcut Keys

➢ Create lists / Browse records
  ➢ Next record - <ctrl>]
  ➢ Previous record - <ctrl> [
➢ Summary of attached records
  ➢ Next record - <ctrl> >
  ➢ Previous record - <ctrl> <
➢ Spot check a long Create List
  ➢ Type the number of an entry
  ➢ Ctrl-END (bottom of list)
  ➢ Ctrl-HOME (top of list)

Sierra Web Help
Search for: **Using Shortcut Keys**

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If you don't like the constant switching back and forth from keyboard to mouse, get familiar with shortcut keys. Most helpful when editing records from a review file or browsing catalog or patron records are these. When looking through the records in a review file, there is no need to close the record and then click on the next record to open it. Likewise, if looking through a summary of records attached to a bib record, these keystrokes will save you from constantly closing and opening records. Or, if you have a long review file to spot check, highlight one of the entries and then type a number to jump to that entry in the list, say, 50, 100, 150 to check every fiftieth record.

Editing from a Create List

➢As you go, remove completed records
➢Dedup a list to remove deleted records
➢Sort several different ways

If you do edit from a review file, I find it helpful to remove the records that I have finished editing as I go so I don't edit something that is completed and so that I can keep my place of where to start the next time. If you are using a list to determine whether a missing item should be deleted or just suppressed and you delete several items, dedup the list to remove them from the list. I recently had a list of missing items and after determining what could be deleted, I deduped the list so I could rapid update the suppression fields and add a missing note. Also, when editing from a large review file, sort it in several different ways to look at all possible types of codes that may be in the records, especially if you are wanting to do a mass deletion of records.

Browse Query

➢ Alternative to Create Lists for quick lookups

➢ Search for patrons by phone # or email

➢ Access through Tools > Browse Query

  ➢ Circulation – Search/Holds

  ➢ Cataloging

Sierra Web Help
Search for: **Retrieving Records with Browse Query**

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One search feature that our staff relies on for quick lookups of non-indexed information (phone numbers and emails in our case) is Browse Query. This search is structured just like Create Lists, except that the results are not saved to a file for future use. It is available in Cataloging and Circulation Search/Holds functions. If you don't find exactly what you want and just want to modify your search, that is not possible. You will have to start the search from scratch.

Exporting Data from Create Lists

➢ Commas, quotes, parentheses, etc. are tricky
➢ When exporting data, use Control Character = 9
➢ Will create a tab-delimited file
➢ No tabs are defined in MARC
➢ Easy to import into Excel

Thanks to Larisa John!

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Exporting records from Create Lists can be a bit tricky, especially if you have repeated fields or data fields with semicolons or commas in them. These are common delimiters for data files and can prove to be time consuming to cleanup if you import the data into Excel. Larisa John suggests using the control character "9" as the delimiter when exporting to create a perfect tab-delimited file. The reasoning is simple – there are no tabs in MARC!

Quickly Scan Barcodes Into a Create List

➢ Use the Enhanced data entry screen

Sierra Web Help
Search for: **Using the Enhanced Query Builder**

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There have been many suggestions for entering a long list of barcodes into a Create List. We do this every month as items are withdrawn from our collection and accumulated so they can be mass-deleted after statistics are gathered. The easiest way I've found is by using the Enhanced tab in Create Lists. The key here is to use "in" as the operator. You can scan the barcodes and then click the "+" to add the next barcode or you can program your barcode scanner to include the "+" for a totally hands-free process. One word of warning with this process. Do not leave a blank search line at the end of your list. Doing so will cause your file to fill with records you don't want because the blank search includes ALL values.

Quickly Scan Barcodes Into a Create List

➢Alternately, use "The Wrangler"

https://listserv.iii.com/read/messages?id=492887#492887

Thanks to Laurie Iffland!

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A very popular post earlier this year was offered by Laurie Iffland who shared "The Wrangler". Laurie's instructions are very detailed on how to manipulate data and create a list based on ISBNs or barcodes by using Excel and enhanced and JSON tabs in Create Lists.
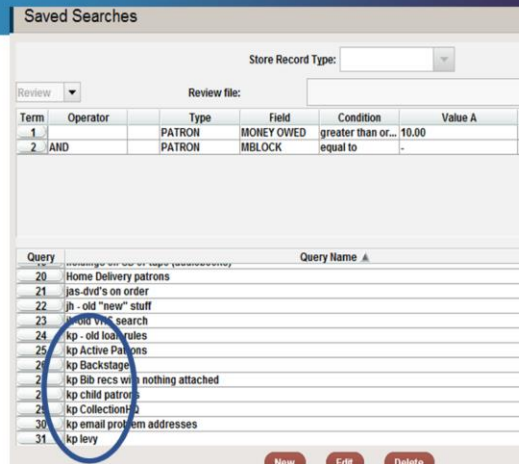
Many of our systems have long lists of saved information in Create Lists. It can become very unwieldy if saved info is not named in some orderly fashion. My suggestion is to come up with a universal naming scheme so that when the saved info is sorted, all the like files will fall together. In this example, I named all of my saved searches with my initials as the start of the name, so when I sort the list, all my searches are clumped together. If you have multiple libraries, I suggest starting the name with your library's abbreviation and then add your initials and then the name of the search.

Database Maintenance

Just as there are macros for individual record editing, there are macros available for global update as well. This takes the power of global update even further as you can save the complex update structures for future use. Two options are available: Local or Server. Macros saved locally will only be available to the current user. Macros saved on the server will be available to all users.

If this demo was live, it would show the process for loading and enacting a global update with a saved macro.

The steps:

1. Create a review file
2. Go to Global Update and select the file
3. On the Command tab, cancel the pop-up "Choose Command" box
4. Select File > Load (Server)
5. Select the saved Macro from the list
6. Edit the Macro if needed.
7. Preview the changes and process the file

One way to find blank or bad codes in your records is to run a field statistics report. But once you see that there are errors in your database, how do you actually find and fix them?
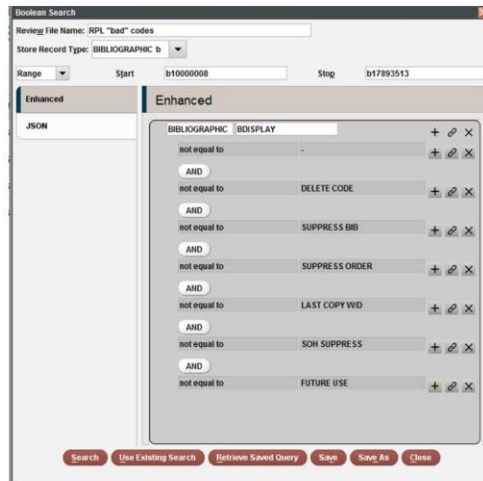
To find the "bad" codes, use the Enhanced tab of Create Lists to search the field in question for all the values that aren't equal to all the valid codes. As you see here, I am searching the BDISPLAY field and then anding together all the valid values with "not equal to" qualifiers. What will result is a list of records that have some other value in the field. How do bad codes happen? Sometimes they are the result of deleting a code before all records are deleted or changed.

Statistics Cross-Tab Report

➢ Create List
➢ Run cross-tab report
➢ Find miscoded fixed fields
  ➢ Regular books coded as audiobooks
  ➢ Audiobooks coded as DVDs
  ➢ DVDs coded as videocassettes
  ➢ BIB vs. ITEM location codes

The statistics cross-tab report is a powerful tool for finding hidden mistakes. To do this, create a list of records that you want to check. Run the cross-tab report on the list in the statistics function. Some things to check are regular books coded as audiobooks, audiobooks coded as DVDs, DVDs coded as videocassettes, or bib locations in the item location field.

Here is an example from our monthly cataloging statistics. In this example, 1 reference book was coded as a regular book and 2 paperbacks were coded as regular books.

Using the information in the statistics report, I can create a list based on the errors found.

Once I find the record in question, I can correct not only that error, but also several other errors that were found when the record was inspected. The regular book template was used instead of the reference book template causing the errors. The status should be "o" and the OPACMSG should be "-" in addition to changing the itype to 3 for reference book.

In this resulting record, I added a message to trap this item when it was returned and to send it to cataloging so the barcode number can be added to the item record.
We're still not sure how it was checked out in the first place without a barcode field!

Theresa Retzner reminds us of this one that is often forgotten and hidden in the View menu. When looking at a record in the SDA, you may want to view it from the public webPAC side. From the View menu, select Public Display. It is very helpful during cataloging to view what the patron will see. It is sometimes easier to see typos this way. Public desk staff have easier access to added webPAC info, such as reviews, links to related titles, and book jackets by searching in SDA and then viewing the public display.

Headings Reports for Finding Errors

➢If you run no other reports, at least run these:
  - ➢Invalid Headings
  - ➢Blind References
  - ➢Duplicate Authorities
  - ➢Duplicate Entries

➢Force records into report
  - ➢Rapid update suppression value
  - ➢Rapid unsuppress value

Except for the die-hard catalogers amongst us, the Headings Reports can be very intimidating. They can become very large and unruly, especially after a large digital load with all its dirty data. If you run no other reports, at least run these once a week if not daily: Invalid headings, Blind references, Duplicate authorities, and Duplicate entries. If you send your headings out for processing on a regular basis, you can probably clear the Headings used for the first time report. Otherwise, train your catalogers to use Ctrl-g on specific headings when cataloging or Ctrl-h to check all headings in the record and fix any headings BEFORE the record is completed. If you suspect that there are records that need to be checked, you can force headings to be checked by updating a field, usually the suppression field, and then unsuppressing them.

Records That Have Lost Their Way

➢Bib records without a title/245

➢Bib records without a call number

➢Patron records with no name

➢Orphaned bib records

➢Deserted records

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Sometimes you may want to check your database for records that are missing a crucial field such as bibs without titles or call numbers, patrons with no names, orphaned bib records, or deserted records. These types of errors sometimes occur when you lose your connection to Sierra, the cataloger abandons one record in favor of another, or someone starts to register a patron and they decide to not get a card.

Missing Fields

This little tip is useful when searching all your records to see if a crucial field is missing or not. Start with a search for a field that has exists or not exists as its condition such as HOLD. Once that is entered, you can then change the field to be searched to any field name you want. In this case, I changed it to BARCODE, but you could just as easily change it to title or anything else.

Make e-Resources Better for Patrons

➢ The 856 lists the resource URL for accessing

➢ But which service is needed?

➢ Create List by service (OverDrive, hoopla, etc.)

➢ Global Update:
|zConnect to title online → |zAccess via Libby/OverDrive

We all have lots of e-resources available in our catalogs these days, but how does a patron (or staff member for that matter) know by glancing at the record whether they need to use their hoopla, Overdrive, or [insert your other eservice here]? Alison Pruntel has solved this one for us. Instead of just having "Click here to access online" with the link, tailor the link with the specific service or app name. To do this, create a list based on the service and then globally update the records changing the existing generic text of "Connect to title online" or whatever you have in subfield z to "Access via [service name]". Your patrons and frontline staff will thank you for your efforts.

This next tip is one that was new to me. Did you know that you don't have to only view the list of Global Update records one way? Thanks to Swetta Abeyta for pointing this one out. With your review file of records selected, right-click on the little toggle button at the top right of the display column.

From the drop-down box that appears, select the field you want to display. You can choose from Bibliographic variable or fixed-length fields.

The new data field and its values now appear on screen. And now that checkbox for "Use displayed field" that I always needed to uncheck makes sense! As Swetta added in her note, it helps her figure out what is in the fields and decide if she needs to update them. Sometimes she will just pull a review file into global update to take a closer look at the data.

Global Update Toggle

➢ Can also use for finding odd/missing codes, extra spaces, etc.

1. Select records

Record Type

☑ BIBLIOGRAPHIC ☐ AUTHORITY ☐ PATRON ☐ ITEM ☐ ORDER ☐ CHECKIN ☐ VENDOR

Review file: 26. New Non-Fiction (February 2020) (246) (BIBLIOGRAPHIC)

#		BDISPLAY	# ENTRIES
1	b	-	245
2	b	SOH SUPPRESS	1
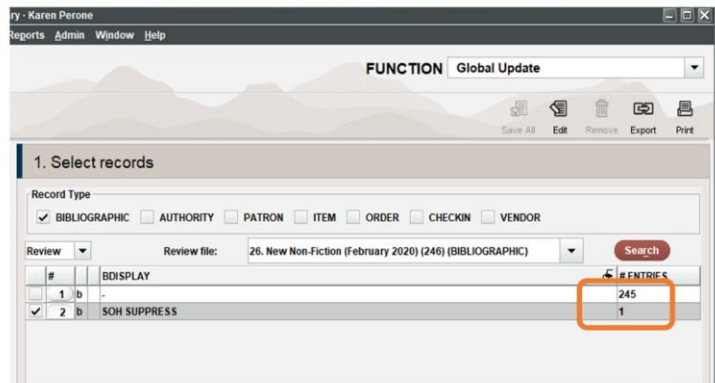
Thanks to Martha Rice Sanders!

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And Martha Rice Sanders added this to the toggle option idea – Using global update to review records in a review file helps to find odd or missing codes, extra spaces in headings, etc., etc.

Circulation

INN-Reach Items Falsely Saying They're Not Checked Out

➢ Problem: You check in a local item from INN-Reach and the system says it's not checked out.
  ➢ Item still shows a due date and patron info
➢ Solution:
  1. Open item record
  2. Change STATUS to "@" (INN-Reach Off-Site)
  3. Save record
  4. Check in the item
  5. If this doesn't work, open Service Commitment

Thanks to Leigh Duncan!

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Many of our libraries belong to INN-Reach consortiums and with that comes a whole bunch of other oddities. This suggestion from Leigh Duncan offers advice on how to handle an item that thinks it's not checked out even though it shows a due date and the patron's info. Open the item record and change the status to @ which is the value for INN-Reach off-site. Save the record and try checking it in again. Many times this will work, but if it still insists that it is not checked out, you will need to open a service commitment to resolve the issue. This process also works when you want to delete a record where the link was broken during an INN-Reach cancellation.

Tired of Mousing?

➢ Problem: You are tired of all the mouse clicks to move from Check-out to Check-in

➢ Solution:
1. Program function keys (Macros) or use keyboard shortcuts
2. Check-Out: Alt-G U D H (Macro: %ALT+g%udh)
3. Check-In: Alt-G U C (Macro: %ALT+g%uc)

Thanks to Leigh Duncan!

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Leigh has also shared her favorite macros to help circulation staff move quickly between check-in and check-out without having to use the mouse. You can either use the keyboard shortcuts or program 2 neighboring function keys with macros to easily switch functions.

Substitution Phrases

A > ADDITIONAL system functions

A > ALTER system parameters

S > SYSTEM Codes

O > Set System OPTIONS

D > Database maintenance

18 – Substitution Phrases

Sierra Web Help
Search for: **Substitution Phrases**

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Substitution phrases are one of the most helpful features for repetitive entering of data. These are similar to macros but can be programmed for specific modules and for use during one session or anytime and all staff can use them. The system-wide substitution phrases need to be programmed in Admin Corner using the roadmap listed here.

Substitution Phrases

22 >	p	AEL ALLIANCE EARLY LEARNING
23 >	p	ALLI ALLIANCE OH 44601
24 >	p	AMS ALLIANCE MIDDLE SCHOOL
25 >	p	FRA FRANKLIN HEAD START
26 >	p	LEX LEXINGTON ELEMENTARY
27 >	p	MAR MARLBORO ELEMENTARY
28 >	p	MMS MARLINGTON MIDDLE SCHOOL

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Our library finds substitution phrases helpful with patron record creation or editing. Before we enabled this feature, there were a multitude of variations for the various schools in our database and our city name had some creative spellings. Patrons would enter anything from abbreviations to the full school name on their card applications. It made searching this field nearly impossible. Now staff use the substitution phrases during record creation or updating and we have continuity. We also use this for the addresses that most of our patrons use. Again, the goal is fewer typos and consistency of data entry.

Substitution Phrase in Use

New PATRON   Last Updated: 03-23-2015   Created: 03-23-2015   Revisions: 0

EXP DATE   . .   CUR CHKOUT   0
COUNTY   s STARK   BIRTH DATE   . .

Insert a non-MARC field

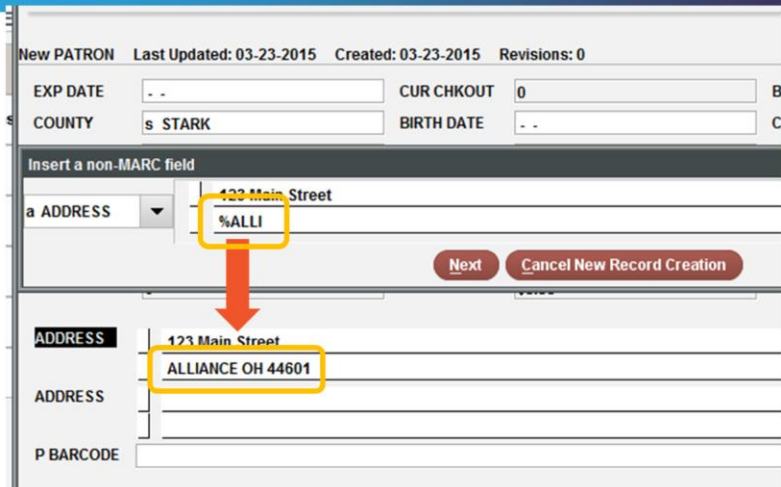a ADDRESS   ▼   123 Main Street
                      %ALLI

                                          Next   Cancel New Record Creation

ADDRESS   123 Main Street
                  ALLIANCE OH 44601

ADDRESS

P BARCODE

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To make use of the substitution phrase, the staff member enters the code with a % in front of it. When the field is entered, the full value is displayed.

Another way to use the substitution phrase is during full-screen editing. Here the staff member right-clicks in the field and selects Substitution Phrase from the menu. The staff member selects the substitution phrase they want to use and the full value is displayed when the "Use" button is clicked.

Remind your staff:
Always be nice to your Systems Administrator.
If that doesn't work, bring donuts.

With apologies to Beth Juhl

That concludes my tips and tricks that will hopefully help you keep your Sierra Sanity in check. And to paraphrase a very wise friend and colleague of mine: Remind your staff: Always be nice to your systems administrator. If that doesn't work, bring donuts. Thank you everyone. I will miss all of you in my retirement.

What's Your Favorite Tip?

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