



## Tips & Tricks for Sierra Sanity

*Advice from a 30 year Innovative Veteran*

Karen Perone, Rodman Public Library  
kperone@rodmanlibrary.com

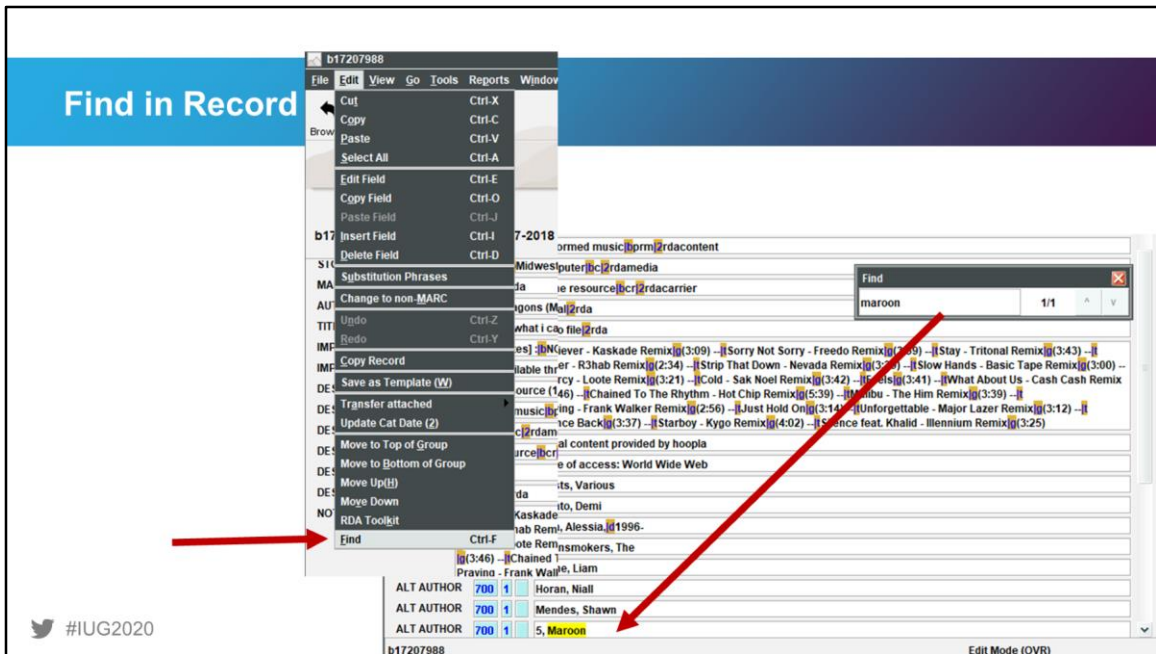
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Pre-Conference • Wednesday, April 15<sup>th</sup>  
Main Conference • Thursday, April 16<sup>th</sup> – Saturday, April 18<sup>th</sup>

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

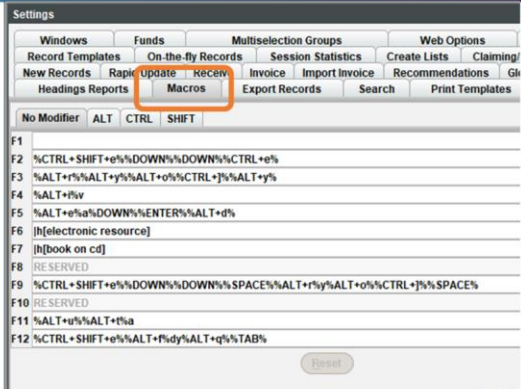


Have you ever encountered a really long contents note or one of those dreaded DVD records that goes on for days? You have one word or phrase that you need to edit, but you're bleary-eyed after editing for hours and just need a little help to find what you need? There is a Find option just like you find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

- Program function keys
- Admin > Settings > Macros
- Use for repetitive tasks



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Sierra Web Help  
Search for: **Macros**



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

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Thanks to Kathy Setter!



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%

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Thanks to Bob Gaydos!



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.”

## Display Settings

The screenshot shows a 'Settings' dialog box with a menu bar at the top containing: Headings Reports, Macros, Export Records, Search, Print Templates, Facet Display, Windows, Funds, Multiselection Groups, Web Options, and Web Master. Below the menu bar are several tabs: Record Templates, On-the-fly Records, Session Statistics, Create Lists, Claiming/Binding, and Statistics. Underneath these are more tabs: New Records, Rapid Update, Receive, Invoice, Import Invoice, Recommendations, Global Update, and Display.

The main content area of the dialog box is divided into several sections:

- Options for Bib View:**  Show Book Jacket or Program Image
- Brief Display:**  Display equivalent 880 fields;  Use larger fonts (does not affect patron record brief display)
- Summary View:**  If no records to display, show all others;  Default to checkin card tab for checkin records
- Browse Options:**  Suppress authority records in Advanced Search browse;  Compact Browse
- Look And Feel:** Skin: Glacier Point (dropdown menu); Toolbar Icon Display:  Icon and label,  Icon only

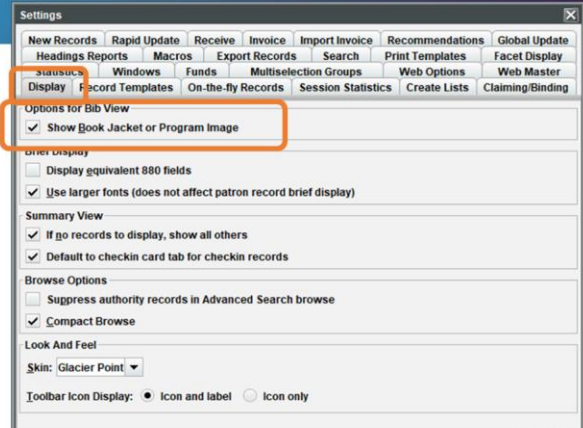
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It's easy to get stuck in a rut with your display. There are many display settings that you can tweak to make your editing experience more rewarding for the type of editing you need to do.

## Book Jackets in SDA

➤ Admin > Settings >  
Display



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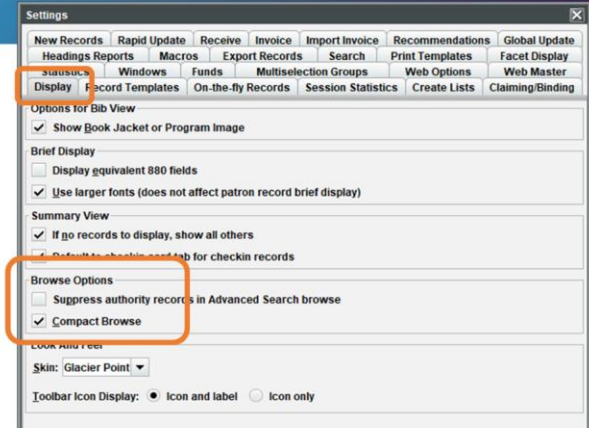


One that has been discussed a lot in recent months revolves around book jackets. If you are having problems with your supplier of images, you may want to turn this option off temporarily so Sierra responds more quickly. If you have a circulation staff member who can't see the images, you may have forgotten to turn this on when setting up their account.



## Compact Browse

- Good for cataloging
- Good for authority work
- Bad if you use like seeing the book jacket



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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

The image shows two screenshots of a library catalog interface. The left screenshot displays a compact view for a specific record, showing the title 'The cuckoo's egg: tracking a spy through the maze of computer espionage' by Clifford Stoll. The right screenshot displays a standard view of search results for 'cuckoo', showing a list of records with their material types (e.g., PRINTED MATL, BOOKS ON CD, E-AUDIO) and book jackets for each entry.

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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

The image shows two side-by-side screenshots of a library catalog interface. The left screenshot shows a standard 'Verify Heading' view for 'Galbraith, Robert'. It displays a search bar with the author's name and a 'Search' button. Below the search bar, there are fields for CALL #, AUTHOR, TITLE, EDITION, and IMPRINT. The main area shows a list of results with columns for Format, #, Description, and # of Entries. A red box highlights the entry for 'Galbraith, Robert' with 39 entries. The right screenshot shows a compact browse view for the same author. It displays the same search bar and fields, but the results are presented in a more compact format. A red box highlights the entry for 'Galbraith, Robert' with 39 entries, which is the same entry as in the standard view. The compact view also shows a 'Source' column with values like 'a100' and 'b100'.

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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



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!



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



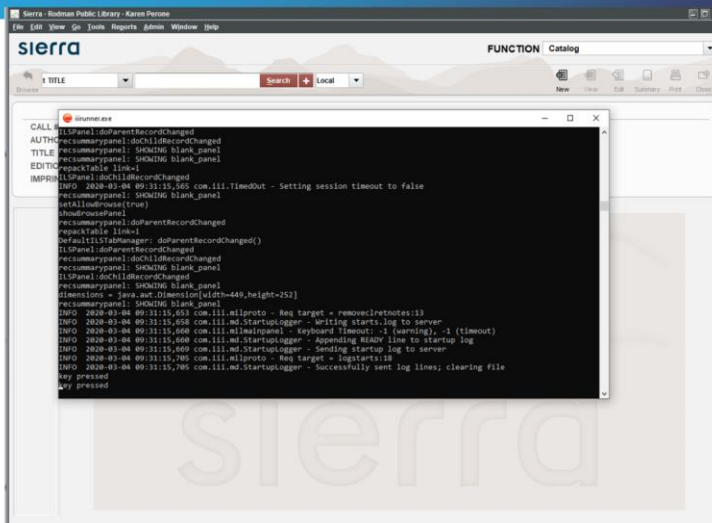
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Thanks to Beth Juhl!



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.

## Missing That Millennium “Black Box”?



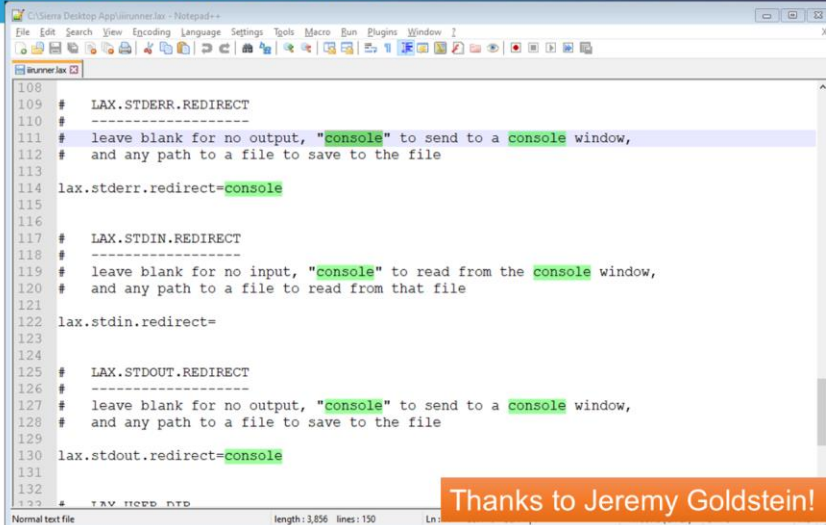
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Remember that Millennium black box that always seemed to be there and in the way? Did you miss it when you upgraded to Sierra? Well, that black box lets you know there is some life in the background when it sometimes seems like a response is taking 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 iirunner.lax



```
108
109 # LAX.STDERR.REDIRECT
110 # -----
111 # leave blank for no output, "console" to send to a console window,
112 # and any path to a file to save to the file
113
114 lax.stderr.redirect=console
115
116
117 # LAX.STDIN.REDIRECT
118 # -----
119 # leave blank for no input, "console" to read from the console window,
120 # and any path to a file to read from that file
121
122 lax.stdin.redirect=
123
124
125 # LAX.STDOUT.REDIRECT
126 # -----
127 # leave blank for no output, "console" to send to a console window,
128 # and any path to a file to save to the file
129
130 lax.stdout.redirect=console
131
132
133 # LAX.HTTP.DIR
```

Normal text file length: 3,856 lines: 150 Ln

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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 iirunner.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.

## That Damn Printer

- Which printer is going to be used:
  - Bib, item, order, patron records = Standard printer
  - Patron checkouts, holds, fines = Receipt printer
- When in doubt, hover over print button



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Thanks to Alison Pruntel!

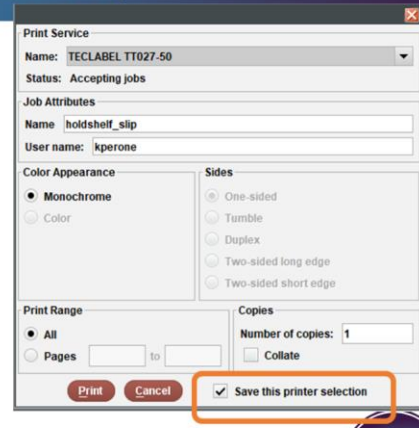
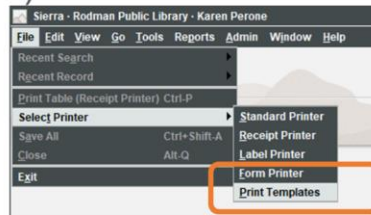


In case you are wondering about the image on the screen, “That Damn Printer” was the name of an early IUG program that was videotaped (yes, back before there were smart phones and VHS was king) featuring two Innovative staff members recreating a typical helpdesk phone call involving printers. Things 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.

## That Damn Printer (aka The Elusive Checkbox)

- You're using Print Templates but the result is going to the wrong printer (or worse, not printing at all)



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Thanks to Alison Pruntel!



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/addabbranch.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

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Thanks to Bob Gaydos!



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.

## Massive Duplication of Locations

```

Mobile Services Truck 1 -- Locations served
001 > lb      041 > lbadv  081 > lbapm  121 > lbcgt  161 > lbczb
002 > lba     042 > lbadx  082 > lbapr  122 > lbcfb  162 > lbczz
003 > lbaaf   043 > lbaea  083 > lbaps  123 > lbchc  163 > lbr
004 > lbaan   044 > lbaec  084 > lbas  124 > lbchc  163 > lbr
005 > lbahh   045 > lbaed  085 > lbas  124 > lbchc  163 > lbr
006 > lbabf   046 > lbaef  086 > lbas  124 > lbchc  163 > lbr
007 > lbabk   047 > lbaen  087 > lbas  124 > lbchc  163 > lbr
008 > lbabm   048 > lbaeo  088 > lbas  124 > lbchc  163 > lbr
009 > lbabn   049 > lbaep  089 > lbas  124 > lbchc  163 > lbr
010 > lbabr   050 > lbaes  090 > lbas  124 > lbchc  163 > lbr
011 > lbabs   051 > lbaet  091 > lbas  124 > lbchc  163 > lbr
012 > lbadw   052 > lbaev  092 > lbas  124 > lbchc  163 > lbr
013 > lbadz   053 > lbaex  093 > lbas  124 > lbchc  163 > lbr
014 > lbaca   054 > lbaefh 094 > lbas  124 > lbchc  163 > lbr
015 > lbacb   055 > lbaefi 095 > lbas  124 > lbchc  163 > lbr
016 > lbacc   056 > lbaefk 096 > lbas  124 > lbchc  163 > lbr
017 > lbace   057 > lbaefm 097 > lbas  124 > lbchc  163 > lbr
018 > lbacf   058 > lbaefr 098 > lbc  124 > lbchc  163 > lbr
019 > lbacg   059 > lbaefr 099 > lbca  124 > lbchc  163 > lbr
020 > lbach   060 > lbaefw 100 > lbca  124 > lbchc  163 > lbr
021 > lbaci   061 > lbaefz 101 > lbcb  124 > lbchc  163 > lbr
022 > lbacj   062 > lbaeg  102 > lbcd  124 > lbchc  163 > lbr
023 > lbac  063 > lbaei  103 > lbcd  124 > lbchc  163 > lbr
024 > lbacm   064 > lbaei  104 > lbcd  124 > lbchc  163 > lbr
025 > lbaco   065 > lbaei  105 > lbcd  124 > lbchc  163 > lbr
026 > lbacp   066 > lbaei  106 > lbcd  124 > lbchc  163 > lbr
027 > lbacr   067 > lbaei  107 > lbce  124 > lbchc  163 > lbr
028 > lbacs   068 > lbaei  108 > lbce  124 > lbchc  163 > lbr
029 > lbacv   069 > lbaei  109 > lbce  124 > lbchc  163 > lbr
030 > lbacw   070 > lbaei  110 > lbce  124 > lbchc  163 > lbr
031 > lbacx   071 > lbaei  111 > lbce  124 > lbchc  163 > lbr
032 > lbacy   072 > lbaei  112 > lbce  124 > lbchc  163 > lbr
033 > lbacz   073 > lbaei  113 > lbce  124 > lbchc  163 > lbr
034 > lbada   074 > lbaei  114 > lbce  124 > lbchc  163 > lbr
035 > lbadc   075 > lbaei  115 > lbce  124 > lbchc  163 > lbr
036 > lbadf   076 > lbaei  116 > lbce  124 > lbchc  163 > lbr
037 > lbadn   077 > lbaei  117 > lbce  124 > lbchc  163 > lbr
038 > lbado   078 > lbaei  118 > lbce  124 > lbchc  163 > lbr
039 > lbads   079 > lbaei  119 > lbce  124 > lbchc  163 > lbr
040 > lbadt   080 > lbaei  120 > lbce  124 > lbchc  163 > lbr
156 > lbcvg  196 > lbxag
157 > lbcvn  197 > lbxag
158 > lbcwc  198 > lbxag
159 > lbcwn  199 > lbxag
160 > lbcwo  200 > lbxag

```

```

1 A B
2 A lba
3 A lbaafAlbaanAlbahhAlbabiAlbakAlbalmAlbalrAlbalwAlbamAlbamxAlbanAlbanfAlbaofAlbaonAlba
pfAlbaphAlbapmAlbaprAlbapsAlbasAlbavAlbawAlbaxAlbaxhAlbaxiAlbaxkAlbaxmAlbaxnAlbaxrAlbaxs
AlbaxwAlbazAlbazzAlbc
4 AlbcfAlbcnAlbcraAlbcxAlbccAlbcdAlbcdnAlbcdxAlbcdAlbceAlbceAlbcenAlbcexAlbcfbAlbcfcAlbcfeAl
bcflAlbcfpAlbcfrAlbcfuAlbcfyAlbcfzAlbcglAlbcgtAlbchAlbchAlbcheAlbchfAlbchnAlbchnAlbchAlbc
huAlbcicAlbcinAlbcjfAlbcjnAlbcjuAlbckiAlbckrAlbcksAlbcnAlbcnfAlbcfoAlbcfnAlbcpcAlbcpeAlbcpf
AlbcpgAlbcpkAlbcpnAlbcprAlbcptAlbcpxAlbcscAlbcslAlbctAlbctnAlbcvfAlbcvgAlbcvnAlbcwAlbcwnAl
bcwoAlbczAlbczzAlbt
5 AlbtAlbtanAlbtbrAlbtfdAlbtfnAlbtftAlbtfnAlbtfiAlbtfkAlbtfmAlbtfrAlbtfsAlbtfwAlbtgzAlbtglAl
btkiAlbtlnAlbtmfAlbtogAlbtotAlbtotAlbtotAlbtotAlbtotAlbtotAlbtotAlbtotAlbtotAlbtotAlbtotAlbt
zbAlbtzzAlbxagAlbxag
6

```

Thanks to Bob Gaydos!



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". 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)

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



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

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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

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



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

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Thanks to Larisa John!



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

ITEM	BARCODE		
in		+	X
	38212002762521	+	X
	38212002762547	+	X
	38212002762539	+	X

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>

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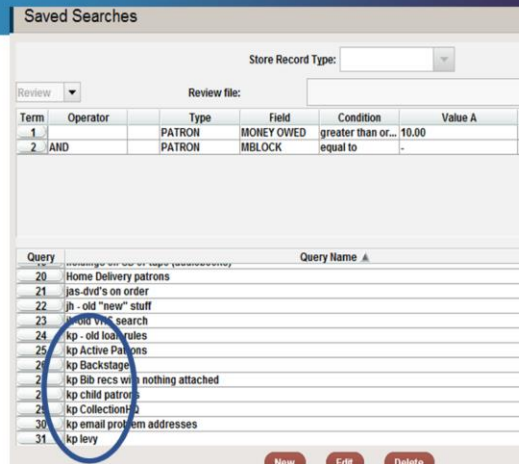
Thanks to Laurie Iffland!



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.

## Review Files

- Use initials in names
  - File names
  - Saved searches
  - Saved exports
  - Saved lists
  - Saved sorts



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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.

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# Database Maintenance

## Global Update Macros

- Save complex change commands for future use
- File > Save/Load Local/Server



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.



## Global Update Macros

File	Name	Current Records	Max Records	Type	Status	Login	Created (date/time)
.61		0	1000		empty		
.62		0	1000		empty		
.63		0	400000		empty	aperone	
.64	LPL patrons with unique block	768	10000	p	complete	yblandt..	08-12-2019 09:45AM
.65	LPL school collection (missing)	123	10000	i	complete	yblandt..	05-24-2019 11:21AM
.66		0	10000		empty		
.67		0	10000		empty		
.68		0	10000		empty		
.69		0	10000		empty		
.70		0	10000		empty		
.71	LPL AR books	5275	10000	i	complete	devars	08-13-2019 01:21PM
.72		0	10000		empty		
.73	Load: Inserted records for Aug_Adds_AB_200	10000	10000	b	complete	kperone	09-05-2019 03:53PM
.74	Load: Inserted records for aug_ebooks.m_349	10000	10000	b	complete	kperone	09-05-2019 03:54PM
.75	Load: Inserted records for aug_videos.m_250	10000	10000	b	complete	kperone	09-05-2019 03:54PM
.76	Load: Inserted records for Aug_Adds_Mn_123	10000	10000	b	complete	kperone	09-05-2019 03:54PM
.77		0	10000		empty		
.78		0	5000		empty		
.79		0	5000		empty		
.80	MB List: BOWEN, DANE W02: 16-09 to 0_15	0	5000	i	complete	swanock	09-04-2019 12:31PM
.81		0	5000		empty		
.82		0	5000		empty		
.83		0	5000		empty		
.84		0	5000		empty		
.85		0	5000		empty		
.86	Load: Overlaid records for LE-09-05-19.m_8	5000	5000	b	complete	aely	09-05-2019 11:36AM
.87	Load: Inserted records for LE-09-05-19.m_13	5000	5000	b	complete	aely	09-05-2019 11:36AM
.88		0	5000		empty		

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RECORDED WITH  
SCREENCAST  
LIMITED TO 200 RESULTS



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

## Statistics Field Report

- Run field stats report
- Find blank/bad values

Select Report

Rodman Public Library  
Report for the Unnamed  
Range = b1000000-1788366  
459965 records were processed. (351624 records had been

Code	Meaning	Record Co.	COPIES
**	Bad Code	31	4
-		214344	328412
i	LAST COPY WID	6	6
n	SUPPRESS BIB	1662	2040
z	SOH SUPPRESS	243922	1219
Totals:		459965	331681

Select Report

Rodman Public Library  
Report for the Unnamed  
Range = b1000000-1788366  
459965 records were processed. (351624 records had been

Code	Meaning	Record Co.	COPIES
badul	Rodmar	6931	18247
bay	Rodmar	1	2
bchil	Rodmar	19960	59292
ladul	Rodmar	20649	52707
lay	Rodmar	670	1526
lchil	Rodmar	9393	35948
madul	Rodmar	97479	146679
mar	Rodmar	127	475
may	Rodmar	3671	7067
mchil	Rodmar	42850	93715
na	Louisville	52214	85178
ns	Louisville	33470	69990
note		1	2
ny	Louisville	4474	7795
nz	Louisville	34366	69990
zzzzz	Rodmar	3	0
Totals:		534761	575909

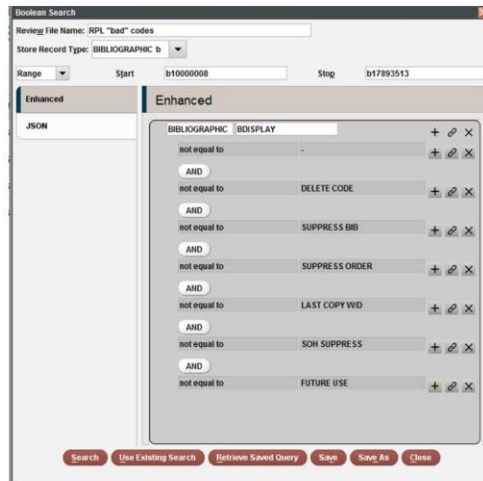
#IUG2020



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?

## Finding “Bad” Codes

- Create List
  - Field doesn't equal all valid values



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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

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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.

Select Report		Rodman Public Library				
IUSE3		Report for the Catd items cross tab - Jan 2015				
LYRCIRC		Review File: Catd items Jan 2015 (1456) (ITEM)				
# OVERDUE		1456 records were processed. (0 records had been deleted.)				
# RENEWALS						
PRICE						
Record Count	Code	Meaning	0 Regular Book	2 Paperback Book	3 Reference Book	6 Toys
TOT CIRC	maq	Main Adult Oversize Q	12	0	0	0
TOT RENEW	maob	Main Adult Oversize Q Bio	1	0	0	0
YTDCIRC	mar	Main Adult Reference	1	0	6	0
	margn	Main Adult ref genealogy	1	0	0	0
	marof	Main Adult Ref Office	51	0	0	0
	marr	Main Ad Ready Reference	0	0	4	0
	masd	Main Adult Book on CD	0	0	0	0
	masf	Main Adult Sci-Fi	1	0	0	0
	masfd	Main Adult Sci-Fi DVD	0	0	0	0
	mawes	Main Adult Western	3	0	0	0
	mc	Main Child Fiction	9	0	0	0
	mcdbb	Main Child Board Books	1	0	0	0
	mcbio	Main Child Biography	3	0	0	0
	mccd	Main Child Compact Disc	0	0	0	0
	mcchd	Main Children's DVD	0	0	0	0
	mcez	Main Child Easy	11	0	0	0
	mcgra	Main Child Graphic Novel	5	0	0	0
	mchol	Main Child Holiday Books	5	0	0	0
	mci	Main Child Fiction 3-4	2	0	0	0
	mcjq	Main Child Fict 3-4 Over	1	0	0	0
	mcnf	Main Children's	31	0	0	0
	mcnf	Main Children's Office	0	0	0	0
	mcpbk	Main Child Paperback	2	1	0	0
	mcpcq	Main Child Pic-Book Oversize	11	0	0	0
	mcpic	Main Child Picture Book	15	0	0	0

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.

Boolean Search

Review File Name: boo boos

Store Record Type: ITEM i


Review: Review file: Catd items Jan 2015 (1456) (ITEM)

Term	Operator	Type	Field	Condition	Value A	Value B
1			ILOCATION	equal to	mar	
2	AND	ITEM	I TYPE	equal to	0	

ITEM ILOCATION equal to "mar " AND ITEM I TYPE equal to "0"

Group  
Ungroup  
Insert Line  
Append Line  
Delete  
Clear All

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

Bib Record - I15653638

File Edit View Go Tools Window Help

Insert Save Save All View Edit Summary Export Print Close

b1411088x  
 AUTHOR Carangelo, Lori  
 TITLE The adoption & donor conception factbook : the most comprehensive source of U.S. & global data on the invisible families of adoption, foster care, & donor conception / Lori Carangelo  
 CALL # 362.8298 C261

Summary Record

Record I15653638

Item-Level Holds 0

Bib-Level Holds 0


Not checked out  
 I15653638 Last Updated: 01-22-2015 Created: 01-15-2015 Revisions: 4

ICODE1	0	INVDA	--	ILOCATION	mar Main Adult Reference
IDISPLAY	-	IN LOC	0	LOANRULE	0
ITYPE	0 Regular Book	RENEWALS	0	STATUS	- AVAILABLE
PRICE	\$26.98	# OVERDUE	0	INTL USE	0
OUT DATE	-- :	ODUE DATE	-- :	COPY USE	0
OUT LOC	0	IUSE3	0	IMESSAGE	- NO MESSAGE
DUE	-- :	RECAL DATE	-- :	OPACMSG	n [NEW ITEM]
PATRON#	0	TOT CHKOUT	0	YTDCIRC	0
LPATRON	0	TOT RENEW	0	LYRCIRC	0
LCHKIN	-- :	LOUTDATE	-- :		

LABEL R

BARCODE 38212005949844

#IUG2020 I15653638 Not checked out Edit Mode (INS)



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.

Bib Record - I12992768 - b11608845

File Edit View Go Tools Window Help

Insert Save View Edit Summary Export Print Close

b11608845  
 AUTHOR **Gottman, John Mordechai**  
 TITLE **The relationship cure : a five-step guide for building better connections with family, friends, and lovers / John M. Gottman and Joan DeClaire**  
 CALL # **158.2 G686**

**Summary**

**Record** I12992768

Item-Level Holds 0  
 Bib-Level Holds 0

**Record**

Checked out on 04-18-2019 05:08PM to 28212001240398 due on 05-30-2019  
 2 renewals 4 overdue(s), last on 07-24-2019 08:13AM  
 I12992768 Last Updated: 07-24-2019 Created: 06-05-2001 Revisions: 122

ICODE1	p	INVDA	08-07-2018	ILOCATION	manf Rodman Main Adult
IDISPLAY	.	IN LOC	100	LOANRULE	1
ITYPE	0 Regular Book	# RENEWALS	2	STATUS	n LONG OVERDUE
PRICE	\$24.00	# OVERDUE	4	INTL USE	0
OUT DATE	04-18-2019 05:08PM	ODUE DATE	07-24-2019	COPY USE	0
OUT LOC	100	IUSE3	0	IME SSGE	- NO MESSAGE
DUE	05-30-2019	RECAL DATE	.	OPACMSG	
PATRON#	1071546	TOT CHKOUT	21	YTDCIRC	1
LPATRON	0	TOT RENEW	9	LYRCIRC	0
LCHKIN	10-02-2017 04:20PM	LOUTDATE	09-01-2017 08:49AM	Item Agency	1 Rodman

MESSAGE Send to cataloging when returned. Barcode missing from item record 7-19-19 klp

I12992768 Checked out on 04-18-2019 05:08PM to 28212001240398 due on 05-30-2019 Edit Mode (INS)

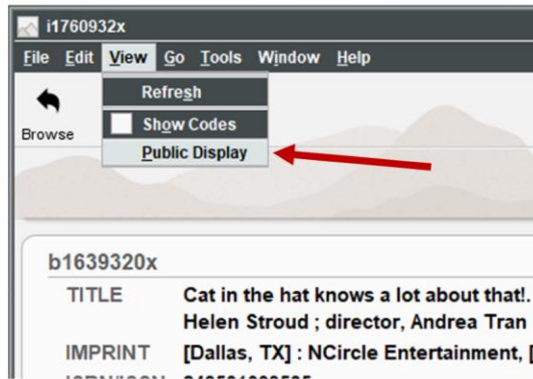
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In this resulting record, I added a message to trap this item when it was returned and to send it to cataloging so the barcode number can be added to the item record. We're still not sure how it was checked out in the first place without a barcode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



## Public Display Option

- From View menu
  - Select Public Display
- Opens WebPAC
  - Easy to see book jacket, reviews, more info



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Thanks to Theresa Retzner!



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

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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

The image shows two screenshots of a library search interface. The top screenshot shows a search for 'HOLD' with the result 'ITEM HOLD not exist'. A red arrow points to the 'Field' column in the search criteria table. The bottom screenshot shows the same search criteria, but the 'Field' column is now 'BARCODE', and the result is 'ITEM BARCODE not exist'.

Term	Operator	Type	Field	Condition	Value A	Value B
1			HOLD	not exist		

ITEM HOLD not exist

Term	Operator	Type	Field	Condition	Value A	Value B
1			BARCODE	not exist		

ITEM BARCODE not exist

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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

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Thanks to Alison Pruntel!



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.

## Global Update Toggle Option

- Open a Review File
- Right-Click on the “Toggle” button



The screenshot shows a web interface titled "1. Select records". At the top, there are radio buttons for "Record Type": BIBLIOGRAPHIC (checked), AUTHORITY, PATRON, ITEM, ORDER, CHECKIN, and VENDOR. Below this is a "Review" dropdown menu and a "Review file:" field containing "26. New Non-Fiction (February 2020) (246) (BIBLIOGRAPHIC)". A search button is visible to the right. The main area is a table with columns for selection checkboxes, a "#", a "TITLE", and a "RES" column. A right-click context menu is open over the "RES" column header, showing options like "RES".

	#	TITLE	RES
<input checked="" type="checkbox"/>	1	b 24510(a)1774 :bthe long year of Revolution /cMary Beth Norton	1
<input checked="" type="checkbox"/>	2	b 24510(a)18 tiny deaths :bthe untold story of Frances Glessner Lee and the invention of modern forensics L...	1
<input checked="" type="checkbox"/>	3	b 24512(a)A beautiful day in the neighborhood :bthe poetry of Mister Rogers /clyrics by Fred Rogers ; illustr...	1
<input checked="" type="checkbox"/>	4	b 24512(a)A black women's history of the United States /cDaina Ramey Berry and Kall Nicole Gross	1
<input checked="" type="checkbox"/>	5	b 24512(a)A child's introduction to the orchestra :blisten to 37 selections while you learn about the instrum...	1
<input checked="" type="checkbox"/>	6	b 24512(a)A collective bargain :bunions, organizing, and the fight for democracy /cJane McAlevey	1
<input checked="" type="checkbox"/>	7	b 24512(a)A culinary history of Cape May :bsalt oysters, beach plums and Cabernet Franc /cJohn Howard-F...	1
<input checked="" type="checkbox"/>	8	b 24512(a)A delayed life :bthe true story of the Librarian of Auschwitz /cDita Kraus	1

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Thanks to Swetta Abeyta!



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.

## Global Update Toggle Option

➤ Select field to view



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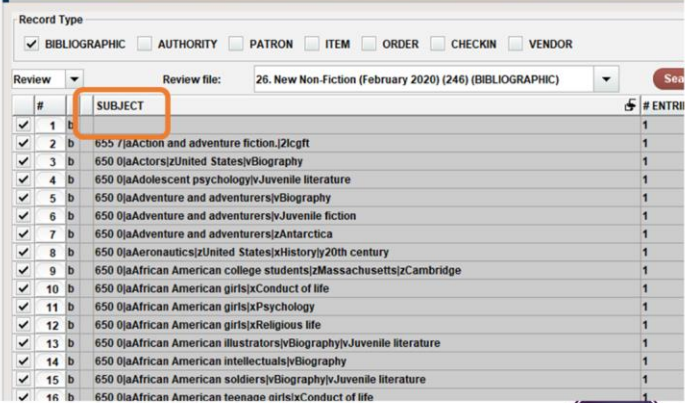
Thanks to Swetta Abeyta!



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

## Global Update Toggle Option

- New data field displays
- “Use displayed data” now makes sense



The screenshot shows a library catalog interface. At the top, there are radio buttons for 'Record Type' with 'BIBLIOGRAPHIC' selected. Below that, a 'Review' dropdown menu is set to '26. New Non-Fiction (February 2020) (246) (BIBLIOGRAPHIC)'. A table of records is displayed with columns for '#', 'SUBJECT', and '# ENTRIES'. The 'SUBJECT' column is highlighted with an orange box. The records list various subject headings such as 'Action and adventure fiction', 'Actors', 'Adolescent psychology', 'Adventure and adventurers', 'Aeronautics', 'African American college students', 'African American girls', 'African American illustrators', 'African American intellectuals', 'African American soldiers', and 'African American teenage girls'.

#	SUBJECT	# ENTRIES
1	b	1
2	b65 7 aAction and adventure fiction. zlcgft	1
3	b650 0 aActors zUnited States vBiography	1
4	b650 0 aAdolescent psychology vJuvenile literature	1
5	b650 0 aAdventure and adventurers vBiography	1
6	b650 0 aAdventure and adventurers vJuvenile fiction	1
7	b650 0 aAdventure and adventurers zAntarctica	1
8	b650 0 aAeronautics zUnited States xHistory y20th century	1
9	b650 0 aAfrican American college students zMassachusetts zCambridge	1
10	b650 0 aAfrican American girls xConduct of life	1
11	b650 0 aAfrican American girls xPsychology	1
12	b650 0 aAfrican American girls xReligious life	1
13	b650 0 aAfrican American illustrators vBiography vJuvenile literature	1
14	b650 0 aAfrican American intellectuals vBiography	1
15	b650 0 aAfrican American soldiers vBiography vJuvenile literature	1
16	b650 0 aAfrican American teenage girls xConduct of life	1

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Thanks to Swetta Abeyta!

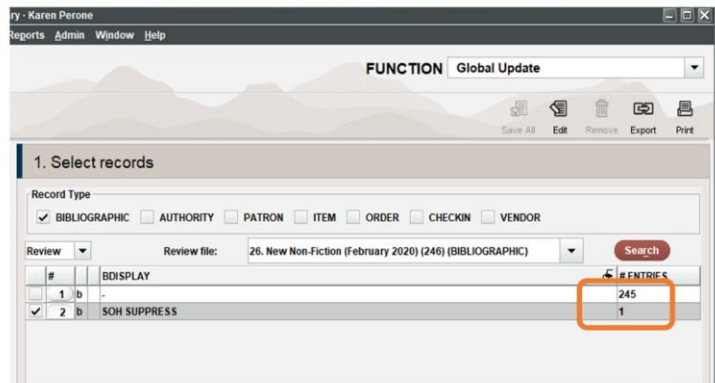


The new data field and its values now appear on screen. And now that checkbox for “Use displayed field” that I always needed to uncheck makes sense! As Swetta added in her note, it helps her figure out what is in the fields and decide if she needs to update them. Sometimes she will just pull a review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



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Thanks to Martha Rice Sanders!



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

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Thanks to Leigh Duncan!



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)

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Thanks to Leigh Duncan!



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

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



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 B  
COUNTY s STARK BIRTH DATE - - C

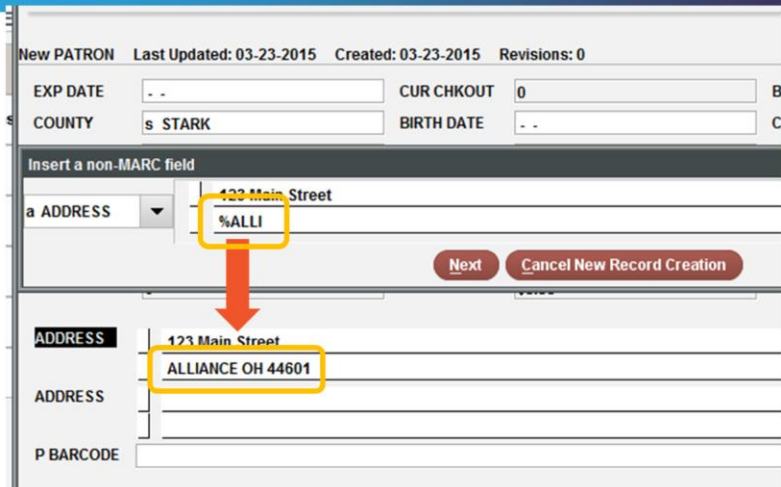
Insert a non-MARC field

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.

## Substitution Phrases in Use

1. Right-Click Select Substitution Phrase from Menu

2. Select from List of Substitution Phrases

3. Click

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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?

Karen Perone, Rodman Public Library  
kperone@rodmanlibrary.com  
flutebrarian@gmail.com (after May 29)

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