

Customizing Print & Email Templates for Sierra Libraries

IUG 2019

Eric Frank

Suffolk Cooperative Library System

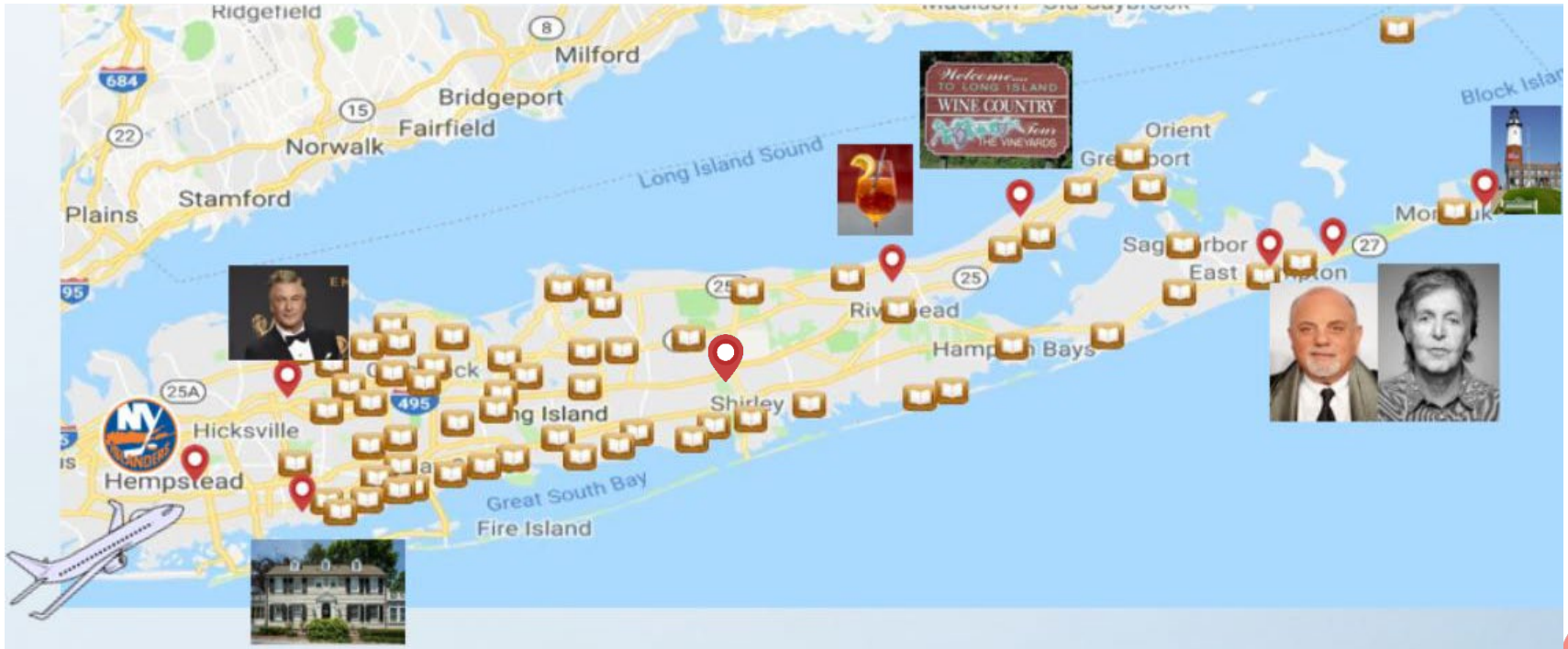
 #IUG2019



Sunday, May 5th | Pre-Conference

Monday, May 6th – Wednesday, May 8th | Main Conference

Suffolk Cooperative Library System Long Island, NY



What we will be discussing today:



- Print & Email Template Basics
- Changing templates with Jaspersoft Studios
- Customizing Due Slips (poster)
- Importing templates into Express Lanes
- Customizing Courtesy Notices
- Customizing Hold Pickup Notices

You probably need to know this..

TIBC Jaspersoft®

- Version of Sierra (4.1)
- Knowledge of Jaspersoft Studios (6.6)
- Basics of an image server



cPanel®

Sierra Version

Sierra · search.livebrary.com · SCLS Eric

File Edit View Go Tools Reports Admin Window Help

sierra

Key or Scan Patron Barcode Search

Browse

EXP DATE --
MBLOCK
PATRN NAME
P BARCODE
ADDRESS

Check Out	0	Check Out
Checked-Out Items	0	Barcode
Holds	0	
Fines	\$0.00	
Check In	0	
Linked Patrons	0	
INN-Reach	0	

About Sierra

Sierra

Copyright © 1999-2019 Innovative Interfaces, Inc.

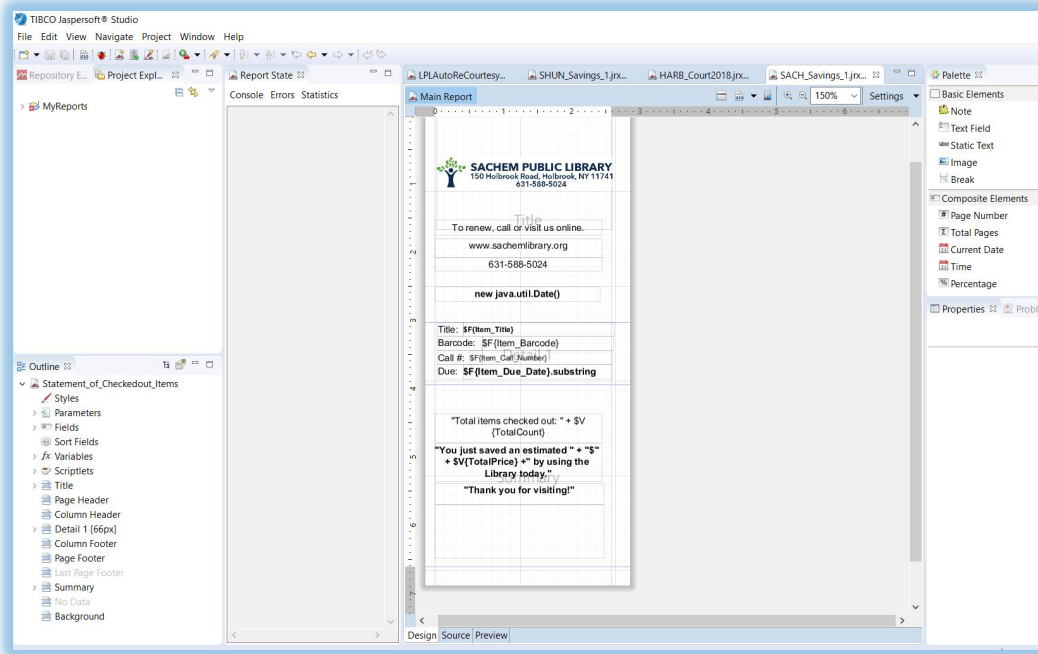
This computer program is protected by copyright law and international treaties. Unauthorized reproduction or distribution of this program is prohibited.

Software Release: Sierra 4.1.0_11
Release Date: September 2018
JRE Version: 1.8.0_45
Current Login: sclsef
Current Permissions: sclsef
Current Accounting/Serials Unit: 22
Current Accounting/Serials Name:NBAB
Current Scope:
Current Locations Served:SCL SILL
Server PID: [20402]
Fiscal Close: Method 1: One set of funds

OK Diagnostic Info

- HELP | ABOUT
- Certain features in this session may require a later version of Sierra
- The more Sierra permissions the better

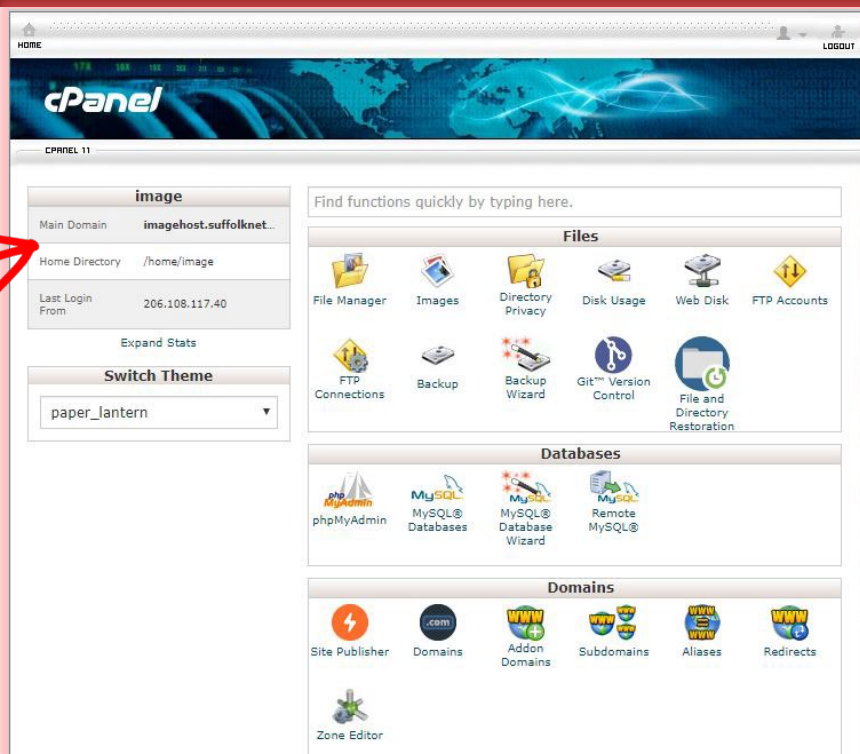




- Install the free version from a Google search
 - Prefer version 6.6
- Should look like this
- Don't be afraid to hit buttons..



cPanel Image Server



HOME

LOGOUT

cPanel

CPANEL 11

image

Main Domain	imagehost.suffolknet...
Home Directory	/home/image
Last Login From	206.108.117.40

Expand Stats

Switch Theme

paper_lantern

Find functions quickly by typing here.

Files

- File Manager
- Images
- Directory Privacy
- Disk Usage
- Web Disk
- FTP Accounts
- FTP Connections
- Backup
- Backup Wizard
- Git™ Version Control
- File and Directory Restoration

Databases

- phpMyAdmin
- MySQL Databases
- MySQL Database Wizard
- MySQL Remote MySQL

Domains

- Site Publisher
- Domains
- Addon Domains
- Subdomains
- Aliases
- Redirects
- Zone Editor

- I use a paid version
- Should be **https**
- Other image servers should work

cPanel

Is it too late to walk out without him noticing?



- Print & Email Template Basics
- Changing templates with Jaspersoft Studios
- Customizing Due Slips (poster)
- Importing templates into Express Lanes
- Customizing Courtesy Notices
- Customizing Hold Pickup Notices

Due Slips: no template (Sierra 4.1)

#999 02-22-2019 04:23PM
Item(s) checked out to p20783395.

TITLE: Robert Moses : builder for democr
BRCD: 30699000272057
DUE DATE: 03-15-19

▼ DUE SLIP

Sierra Admin

MESSAGES

Message to print on due slip:

Line 1:

Line 2:

Patron information on due slip:

barcode name neither

Unchecked

Settings

Windows	Funds	Multi-selection Groups	Web Options
Record Templates	On-the-fly Records	Session Statistics	Create Lists Claiming/Bind
New Records	Rapid Update	Receive Invoice	Import Invoice Recommendations Global
Headings Reports	Macros	Export Records	Search Print Templates

Output Type Due Slip

Use Print Templates

Preferred Templates

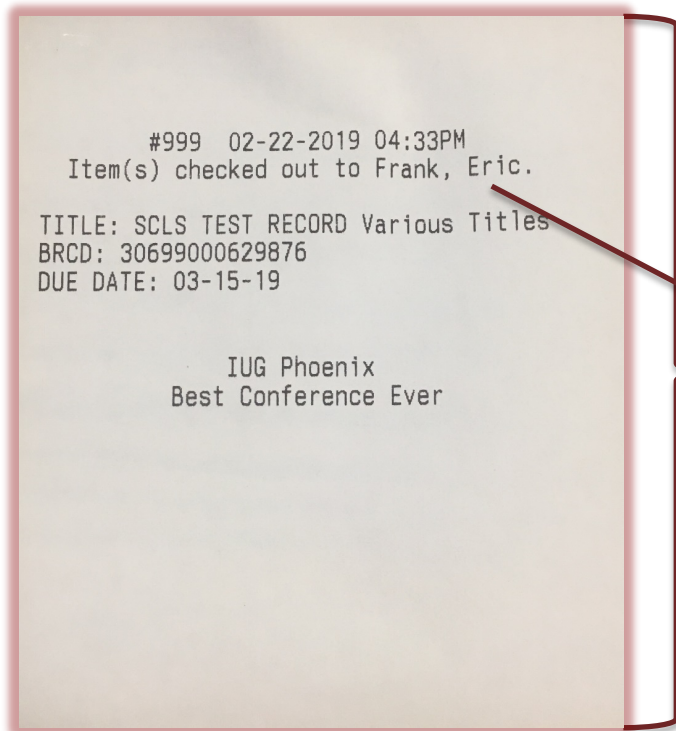
SHUN Save SHUN Savings

Other Templates

SACHdue SACH Due Slip

SACHdue18 SACH due 2018

Due Slips: no template w/ text (Sierra 4.1)



▼ DUE SLIP

Sierra Admin

MESSAGES
Message to print on due slip:

Line 1:

Line 2:

Patron information on due slip:
 barcode name neither

Unchecked

Settings

Windows	Funds	Multi-selection Groups	Web Options
Record Templates	On-the-fly Records	Session Statistics	Create Lists Claiming/Bind
New Records	Rapid Update	Receive Invoice	Import Invoice Recommendations Global
Headings Reports	Macros	Export Records	Search Print Templates

Output Type: Due Slip Use Print Templates

Preferred Templates

SHUN Save	SHUN Savings
-----------	--------------

Other Templates

SACHdue	SACH Due Slip
SACHdue18	SACH due 2018

Uh, yeah, easy!



- Print & Email Template Basics
- Changing templates with Jaspersoft Studios
- Customizing Due Slips (poster)
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- Customizing Courtesy Notices
- Customizing Hold Pickup Notices

Due Slips: III generic templates

Email

The screenshot shows the SCLS Eric web interface. A 'Settings' window is open, displaying a preview of an email template titled 'Date Due Receipt'. The preview includes a header with a logo and the date '02/22/2019'. Below the header, it says 'You have checked out the following item(s):'. A table with columns 'TITLE', 'BARCODE', and 'DUE DATE' is shown, with 'null' under 'BARCODE'. A list of 'Other Templates' is visible on the right, including 'SMTH Due Slips', 'SMTK Due Slips', 'SMTN Due slips', 'Due Date', 'test by lorraine 9', 'Test yoda', 'WBABlogo', 'WBABlogo1', 'rev04', 'WBABOCT16', 'WBABOCT16', 'WBABSEPT16', 'SEPT16', 'WBABsummer', 'WBAB', 'WISPSave', 'WISP Savings', 'Default Due Slip', and 'Default 40 Colum'. Buttons for 'Rename', 'Edit', 'Preview', 'Import', and 'Export' are at the bottom.

Print

The screenshot shows the SCLS Eric web interface. A 'Viewing_DueSlip_40_Col' window is open, displaying a preview of a print template titled 'Date Due Receipt'. The preview includes the date '02/22/2019' and the text 'Items checked out to'. Below this, the fields 'TITLE', 'BARCODE', 'DUE', and 'DATE' are listed. A list of 'Other Templates' is visible on the right, including 'SMTH Due Slips', 'SMTK Due Slips', 'SMTN Due slips', 'Due Date', 'test by lorraine 9', 'Test yoda', 'WBABlogo', 'WBABlogo1', 'rev04', 'WBABOCT16', 'WBABOCT16', 'WBABSEPT16', 'SEPT16', 'WBABsummer', 'WBAB', 'WISPSave', 'WISP Savings', 'Default Due Slip', and 'Default 40 Colum'. Buttons for 'Import' and 'Export' are at the bottom.



generic templates

Always export the most recent Innovative template to modify

- At the bottom of the template library (_right side)

Why?

- It will have all the latest features that Sierra offers in the data library
- Simply updating an old version may not work for that reason
- You can copy the information from the old one into the new one

Due Slip: Email



Circulation Notices

sierra@suffolknet.org

To: eric@suffolknet.org

> 🖨️ ↶ ↷ ⏪ ⏩ < 1 secs ago • ⓘ 🔒

**Image needs to be
on a secure image
server**

Date Due Receipt


Stat Group ⁹⁹⁹ 03/26/2019

Frank, Eric

You have checked out the following item(s):

TITLE	BARCODE	DUE DATE
SCLS TEST RECORD Various Titles	30699000361603	04-16-19

Due Slip: Email customized



Date Due Receipt 03/26/2019

Smithtown Library - Nesconset Building
<http://smithlib.org>

Check this out...

Project Prom-Every year, thousands of girls and guys struggle to afford the expenses of prom, so a collective of Suffolk County libraries are stepping up to help. Please see the Reference Desk for more information.

Frank, Eric

You have checked out the following item(s):


TITLE: The encyclopedia of ancient and forbidden knowledge /

DVD

BARCODE: 30699000274723

Due Date: 04-16-19

Check your account and renew library items here: <http://smithlib.org> or call (631) 360-2480



SACHEM PUBLIC LIBRARY
150 Holbrook Road, Holbrook, NY 11741
631-588-5024

03/26/2019

Sachem Public Library

<http://www.sachemlibrary.org>

Frank, Eric

You have checked out the following item(s):

TITLE: SCLS TEST RECORD Various Titles

BARCODE: 30699000129448

Due Date: 04-16-19

- Electronically
- Right now only Expresslanes but hopefully coming
- Customizable
- Marketing
- [URL Link](#)



#IUG2019

Customizing Due Slip for Email (screencast)

The screenshot shows the Sierra library system interface. The main window is titled "sierra" and has a "FUNCTION" dropdown set to "Check Out (Circulation Desk)". A search bar is present with the text "Key or Scan Patron Barcode" and a "Search" button. On the left, there is a sidebar with a file manager showing folders like "BAD_SCLS", "cache", "etc", "logs", "mail", "public_ftp", "public_html", "cgi-bin", "constar", "imageh", "livebran", "scls", "ssl", "tmp", and "var".

The main content area is titled "Check Out" and includes a "Print slip" checkbox which is checked. Below this is a table with the following columns: Barcode, Title, Due Date, and Status. The table contains several rows of data, including:

Barcode	Title	Due Date	Status
EISPllogo.gii		Oct 29, 2013, 1:30 PM	Image/x-generic
ELWDlogo16.png		Nov 9, 2016, 2:29 PM	image/x-generic
EIwoodLogo300.jpg		May 15, 2013, 1:16 PM	Image/x-generic

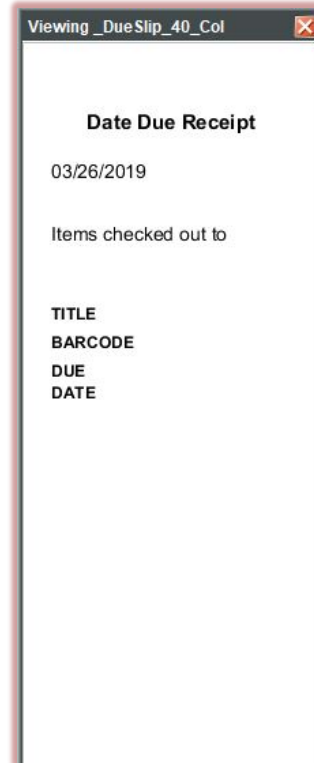
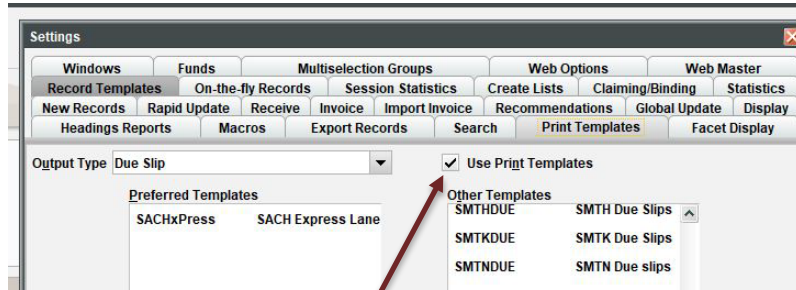
On the right side of the interface, there is a "Permissions" section with a list of values, all of which are "0644".

RECORDED WITH
SCREENCASTOMATIC

#IUG2019

IUG2019
Phoenix, AZ

Due Slip: print




- Simple
- Requires a postscript printer
- Customizable
- Free Marketing
- Inexpensive

Sample from Poster Session

CREATING A SAVINGS RECEIPT IN SIERRA


WILL BE DEMONSTRATED IN SESSION TITLED: CUSTOMIZING TEMPLATES IN SIERRA SPECIFICALLY PRINT & EMAIL



ERIC FRANK | SUFFOLK COOPERATIVE LIBRARY SYSTEM
ERIC@SUFFOLKNET.ORG

USING ITYPES IN SIERRA TO CREATE A SAVINGS RECEIPT

1. Export your ITYPES into Excel
2. Use Sierra statistics or find the average of your material cost to assign to the ITYPES
3. Export the most recent III due slip template from Sierra
4. Open that template in JasperSoft Studio. Create the variable fields **TotalPrice**, **TotalCount** & **Price**
5. Create a summary field & add **SV[TotalPrice]** as the java code
6. Open the **Price** editor box and import your price (nearest dollar) associated with the name of each ITYPE
7. Add another text field box & the java code **SV[TotalCount]**
8. Finish, save & import into Sierra



ERIC FRANK | SUFFOLK COOPERATIVE LIBRARY SYSTEM
ERIC@SUFFOLKNET.ORG

Step 1: Export generic III template from Sierra

The screenshot displays the TIBCO JasperSoft Studio interface. The main workspace shows a report design for 'Date Due Receipt'. The design includes a title 'Date Due Receipt', a date field 'new java.util.Date()', and a table with columns 'TITL', 'BARCODE', and 'DUE'. The table data is as follows:

TITL	BARCODE	DUE
SF(Item_Titl)	SF(Item_Barcode)	SF(Item_Due_Date)

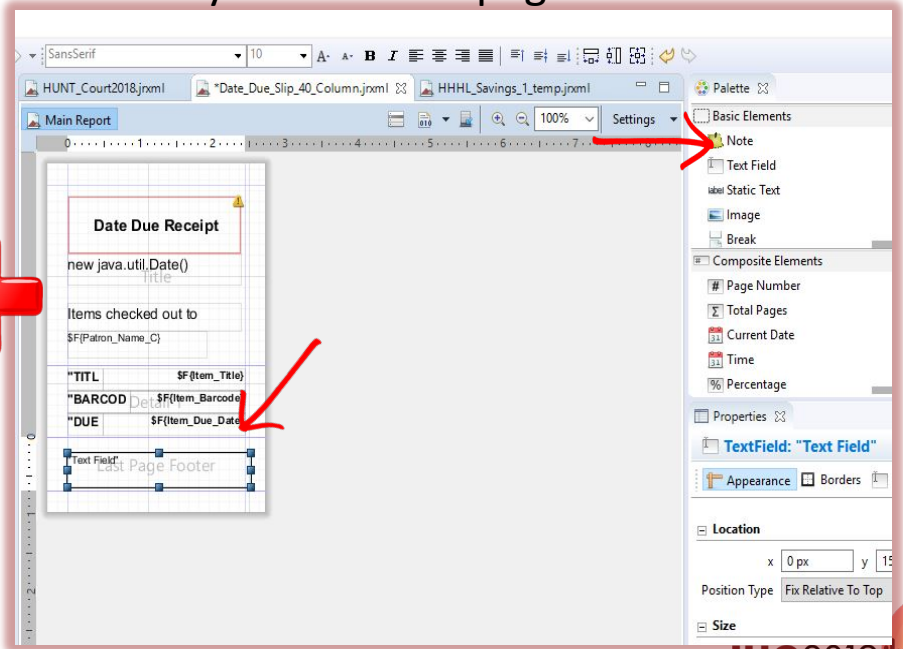
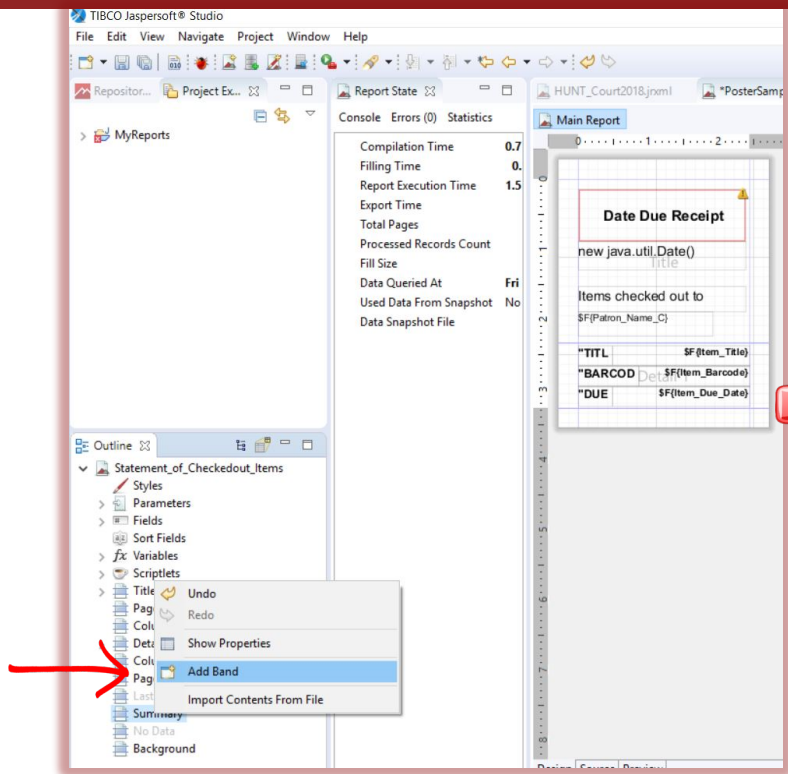
The Properties window on the right shows the report configuration:

- Report Name: Statement_of_Che
- Description:
- Language: java
- Imports: net.sf.jasperreport
- Format Factory Class:
- When No Data Type: <NULL>
- Options: Title On A New Page, Summary On A New Page, Summary With Page Header And Foote, Float Column Footer

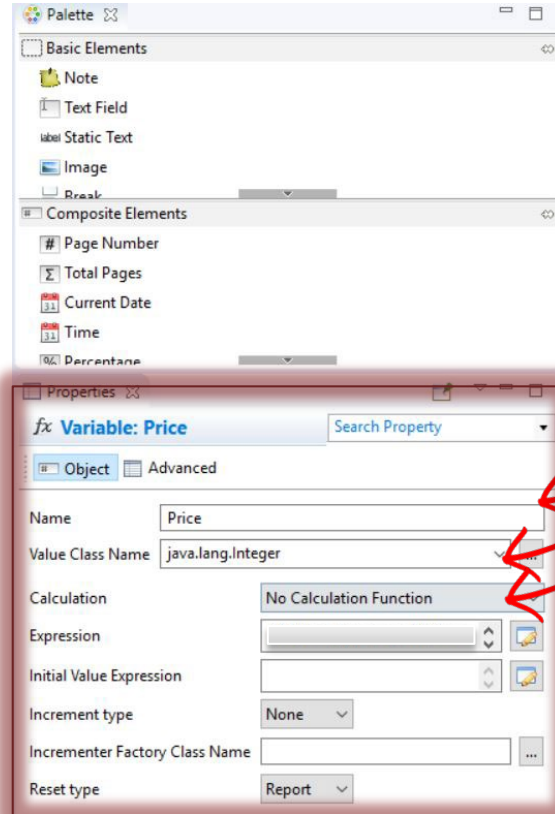
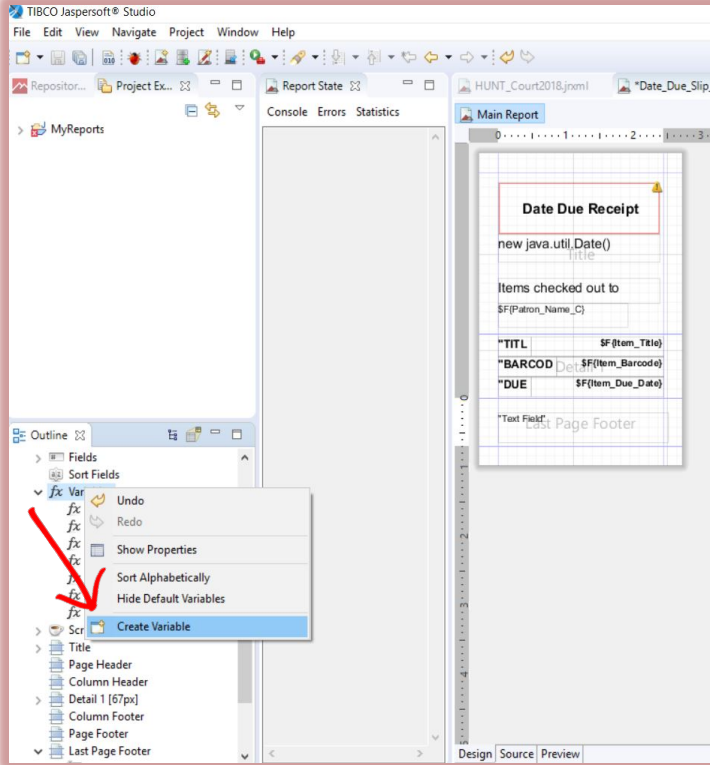
- Open the generic template in JasperSoft Studios

Step 2: Add a Summary band & text field

Insert a text field and draw a box over the newly created last page footer band.

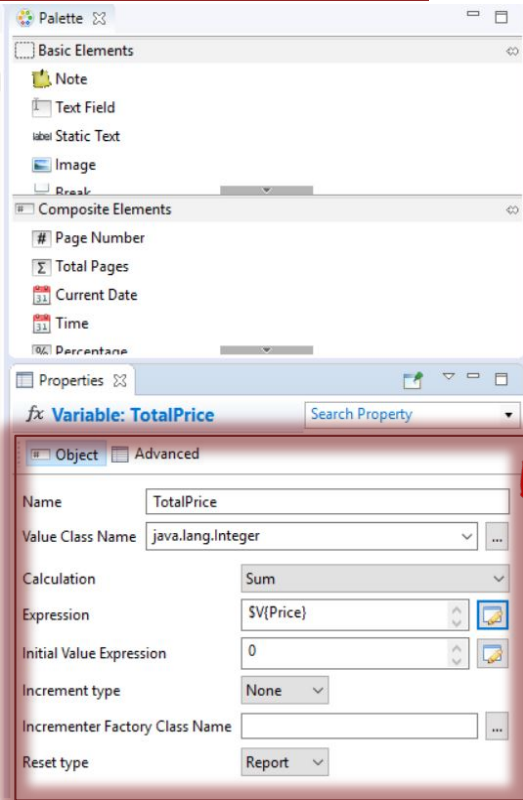
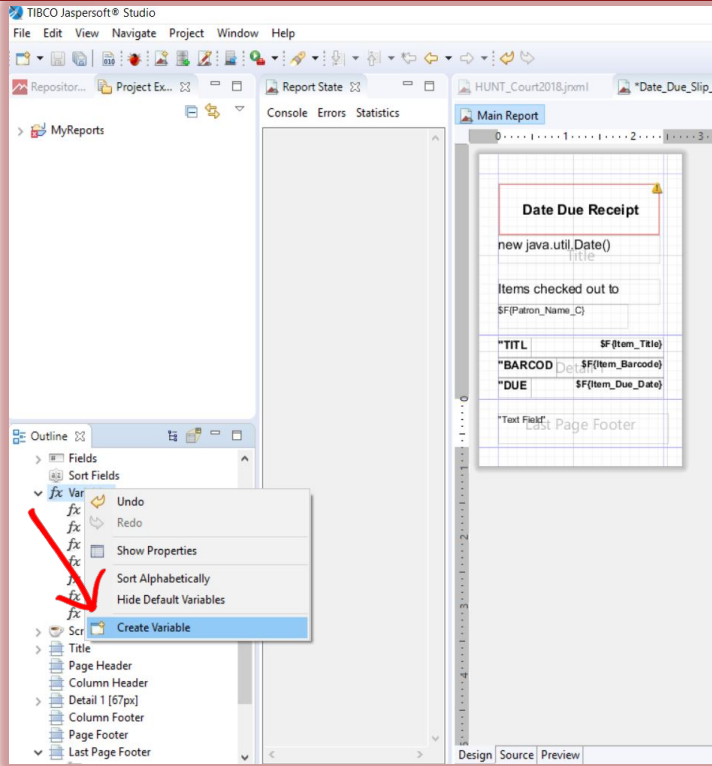


Step 3a: Create these 3 fx Variables



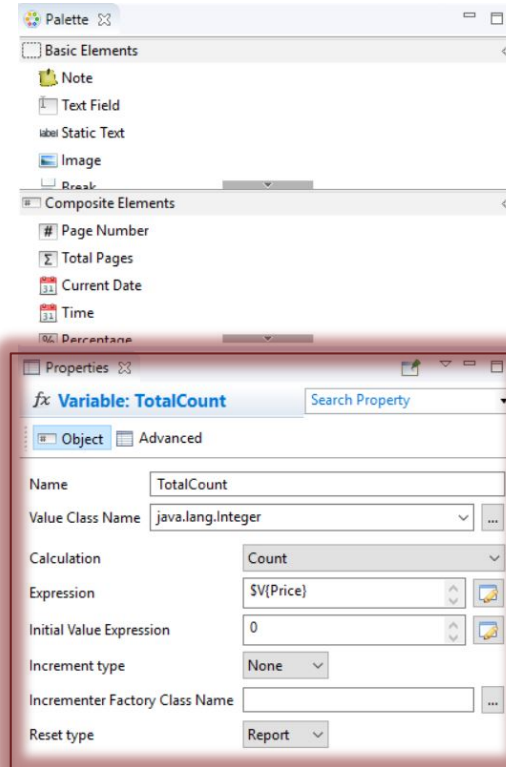
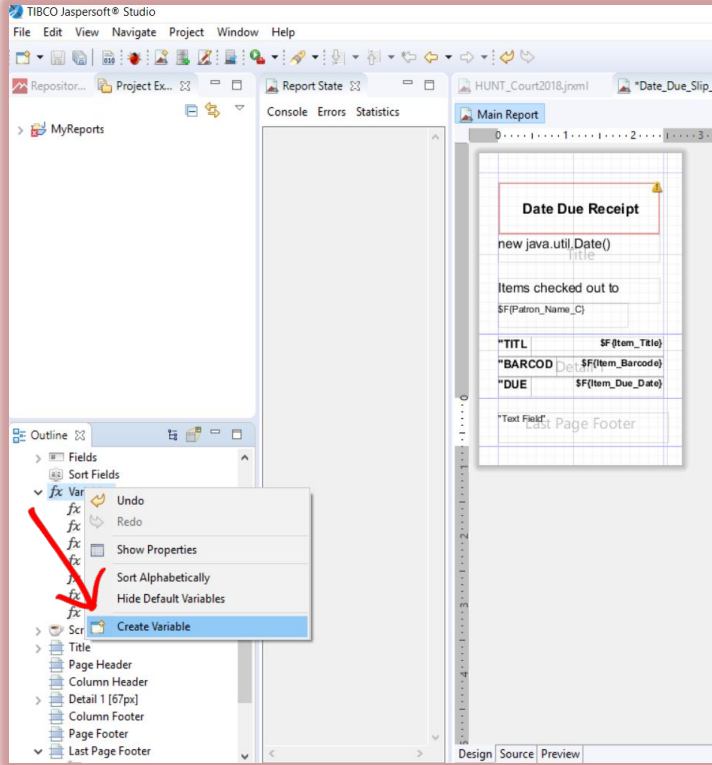
- Rename Variable_1 to Price
- Change Value Class Name
- Change Calculation

Step 3b: Create these 3 *fx* Variables



- Repeat previous steps but to look like this

Step 3c: Create these 3 fxVariables



- Repeat previous steps but to look like this

Step 4: Add newly created Variable field

The screenshot shows the JasperReports Expression Editor window. The main text area contains the expression `"$" + $V{TotalPrice}`. A red arrow points to the `$V{TotalPrice}` part of the expression. Below the text area, there are two panes: 'Parameters' and 'Fields'. The 'Fields' pane is expanded, showing a list of fields including `Item_Title Field String`, `Item_Author Field String`, `Item_Publisher Field String`, `Item_Bib_Record_Id Field String`, `Item_Edition Field String`, `Library_Address_Line1_C Field S`, `Library_Address_Line2_C Field S`, `Library_Address_Line3_C Field S`, `Library_Address_Line4_C Field S`, `Patron_Name_C Field String`, `Patron_Address_Line1_C Field S`, `Patron_Address_Line2_C Field S`, `Patron_Address_Line3_C Field S`, `Patron_Address_Line4_C Field S`, `Item_Barcode Field String`, `Item_Due_Date Field String`, and `Item_Location Field String`. The `$V{TotalPrice}` variable is highlighted in the list. A red arrow also points to the `$V{TotalPrice}` variable in the list. The 'Value Class (backward compatibility only)' section at the bottom is empty. The 'Finish' and 'Cancel' buttons are visible at the bottom right.

- Add the expression and java code “\$”
- <https://docs.oracle.com/javase/6/docs/api/java/lang/String.html>

Step 5: Repeat with other variable field

The screenshot shows the JasperReports Expression Editor window. The main text area contains the expression: `SV(TotalCount) + "Items checked out"`. A red arrow points to the text `"Items checked out"`. Below the text area, there are two panes: "Parameters" and "Variables". The "Variables" pane is active, showing a list of variables. The variable `TotalCount` is selected, and its type is `Integer`. A red arrow also points to the `TotalCount` variable in the list. The background shows a preview of a report titled "Date Due Receipt" with a table containing columns for "Date Due", "Barcode", and "Due".

- Optional, but add the expression and java code "items checked out"
- <https://docs.oracle.com/javase/6/docs/api/java/lang/String.html>

Step 6: Itypes from Sierra

Item #	Label
0	
1	Does Not Circulate
2	Default Circ
3	
4	
5	AR TEST 5
6	AR TEST 6
7	AR TEST 7
8	
9	
10	
11	
12	
13	New Book - 7 Day
14	New Book - 14 Day
15	New Book - 21 Day
16	New Book - 28 Day
17	Paperback
18	
19	Holiday
20	Civil Service Manuals
21	Test Books
22	
23	Magazine
24	Entertainment VHS
25	Non-Fiction VHS
26	
27	
28	Book on Tape
29	

Admin |
Parameters
| General |
Itypes

Itype #	Item	Price
0		
1	Does Not Circ	\$20.00
2	Default Circ	\$15.00
3		
4	TEST	
5	TEST	
6	TEST	
7		
8		
9		
10		
11		
12		
13	New Book – 7 Day	\$25.00
14	New Book – 14 Day	\$15.00
15	New Book – 21 Day	\$15.00
16	New Book – 28 Day	\$15.00
17	Paperback	\$8.00
18		
19	Holiday	\$20.00
20	Civil Service Manuals	\$20.00
21	Test Books	\$25.00
22		
23	Magazine	\$5.00
24	VHS	\$10.00
25	Non Fic VHS	\$10.00
26		
27		
28	Book on Tape	\$67.00
29		
30	Vertical File	\$10.00
31	Kits	\$100.00
32		
33		
34		
35	Equipment	\$50.00
36	Automotive Book	\$20.00
37	Special Collection	\$50.00
38	Realia	\$50.00

- Export Itypes from Sierra into Excel (easier to use because it pulls the name and **NOT** number!

Step 7: Import Itypes into Jaspersoft

Add the expression and repeat for EVERY Itype

The screenshot displays the TIBCO JasperSoft Studio interface. The main window is the Expression Editor, which contains the following Java code:

```
($F{Item_Type}.equals("Does Not Circulate") ? 20 : .)
```

A red arrow points to the expression editor. Below the code, there are two panes: "Parameters" and "Fields". The "Fields" pane lists various fields, including "Price". A red arrow points to the "Price" field in the "Fields" pane. To the right of the Expression Editor is the Properties window, which shows the "Variable: Price" configuration. A red arrow points to the "Calculation" dropdown menu, which is currently set to "No Calculation Function".

Step 8: Itypes from Sierra

The screenshot displays the TIBCO JasperSoft Studio interface. The main window is the Expression Editor, which contains the following code:

```
($F{Item_Type}.equals("Does Not Circulate") ? 20 : $F{Item_Type}.equals("Default Circ") ? 15 : $F{Item_Type}.equals("New Book - 7 Day") ? 25 : $F{Item_Type}.equals("New Book - 14 Day") ? 15 : $F{Item_Type}.equals("New Book - 21 Day") ? 15 : $F{Item_Type}.equals("New Book - 28 Day") ? 15 : $F{Item_Type}.equals("Paperback") ? 8 : $F{Item_Type}.equals("Holiday") ? 20 : $F{Item_Type}.equals("Civil Service Manual")
```

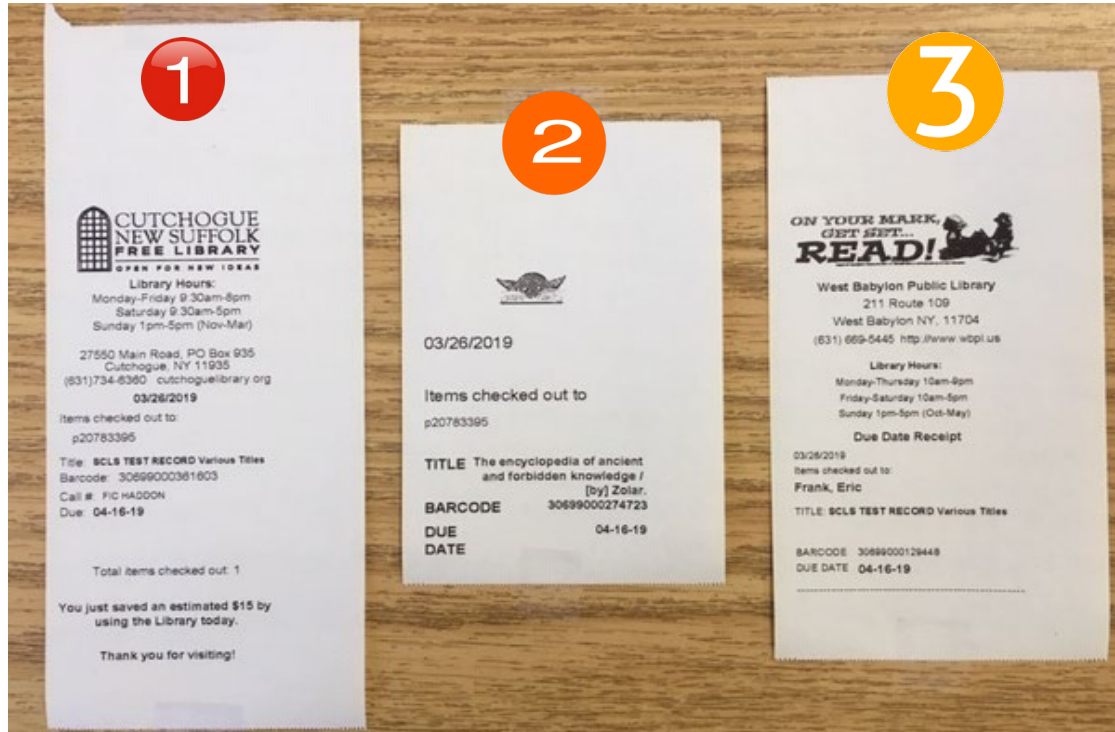
A red arrow points to the text "Edit the JasperReports expression that returns the expected type." above the code. Another red arrow points to the "Price" field in the Outline pane on the left. A third red arrow points to the "No Calculation Function" dropdown in the Properties palette on the right, which is now populated with the expression: `($F{Item_Type}.equals("Does Not Circulate") ? 20 : $F{Item_Type}.equals("Default Circ") ? 15 : $F{Item_Type}.equals("New Book - 7 Day") ? 25 : $F{Item_Type}.equals("New Book - 14 Day") ? 15 : $F{Item_Type}.equals("New Book - 21 Day") ? 15 : $F{Item_Type}.equals("New Book - 28 Day") ? 15 : $F{Item_Type}.equals("Paperback") ? 8 : $F{Item_Type}.equals("Holiday") ? 20 : $F{Item_Type}.equals("Civil Service Manual")`.

This field is now populated

Due Slip: print customized (screencast)

The screenshot displays the TIBCO JasperSoft Studio interface. The central window shows a report titled "Main Report" for "CUTC_Court2018_1.jrxml". The report content includes the logo for "CUTCHOGUE NEW SUFFOLK FREE LIBRARY" with the tagline "OPTIM FOR NEW IDEAS". Below the logo, it lists "Library Hours" for Monday-Friday, Saturday, and Sunday. The address is "27550 Main Road, PO Box 935, Cutchogue, NY 11935" with the phone number "(631)734-6360" and website "cutchoguelibrary.org". A Java code snippet is shown: `new java.util.Date()`. The report also displays "Items checked out to:" with a field `SF(Patron_Record_ID_C)`. A table lists item details with columns for Title, Barcode, Call #, and Due date, with a due date formula: `Due: SF(Item_Due_Date).substring`. A summary section contains a text box with the formula: `"Total Items checked out." + SV (TotalCount)`. Below this, a message reads: "You just saved an estimated " + S + SV(TotalPrice) + " by using the Library today." followed by "Thank you for visiting!". The interface includes a menu bar, toolbar, palette, and a right-hand properties panel for a text field.

Due Slip: print samples



1

Hours, image, address, website, savings

2

Image, patron number, bold text

3

Marketing image, address, website, hours

Savings receipt FAQ

- Q: Can you get the historical savings data for a patron?
- Q: Can you pull the item price from the item record to be calculated?
- Q: Can you use this on an Expresslane?
- Q: What happens if I add or change an ITYPE?

Yeah.. I'm just gunna print the slides



- Print & Email Template Basics
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- Customizing Hold Pickup Notices

Caution: Selfcheck portion ONLY

KEEP OUT! CAUTION! KEEP OUT! CAUTION! KEEP OUT! CAUTION!

Welcome to Self Check Out.
Please scan your library card.

Enter your
Username



English

Español

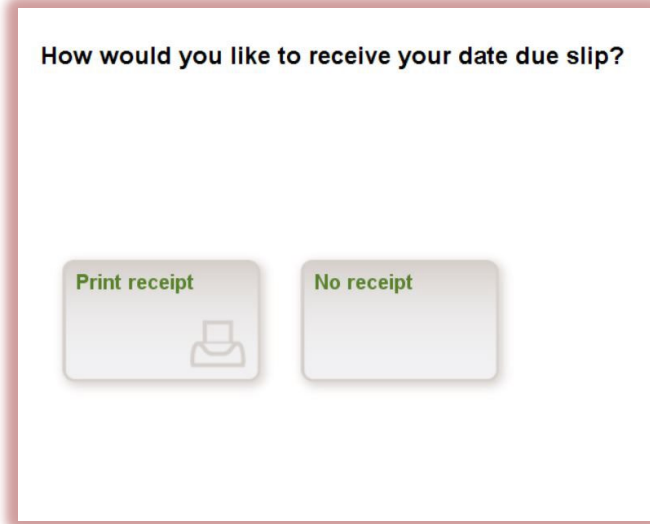
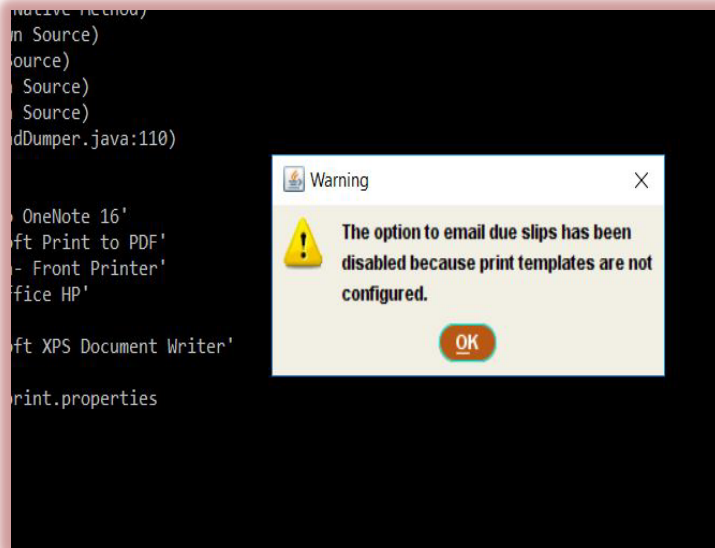


**EXPRESS
Lane**

IUG2019
Phoenix, AZ

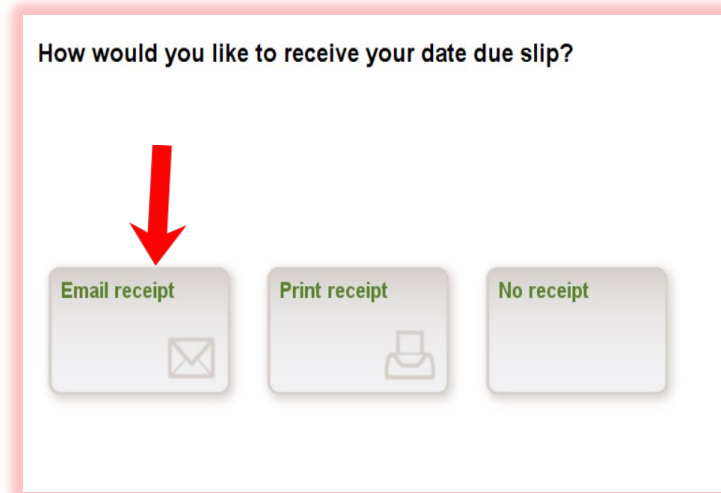
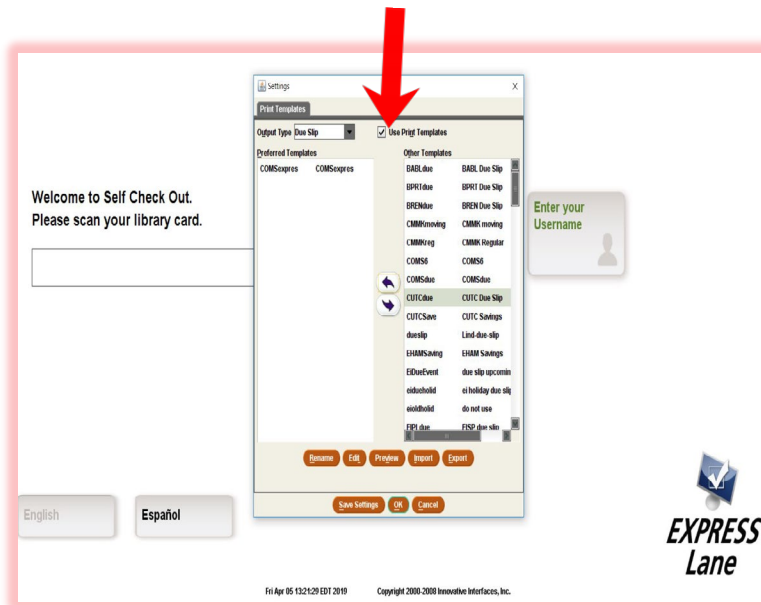
 #IUG2019

Using Expresslane templates (none)



Expresslane screen

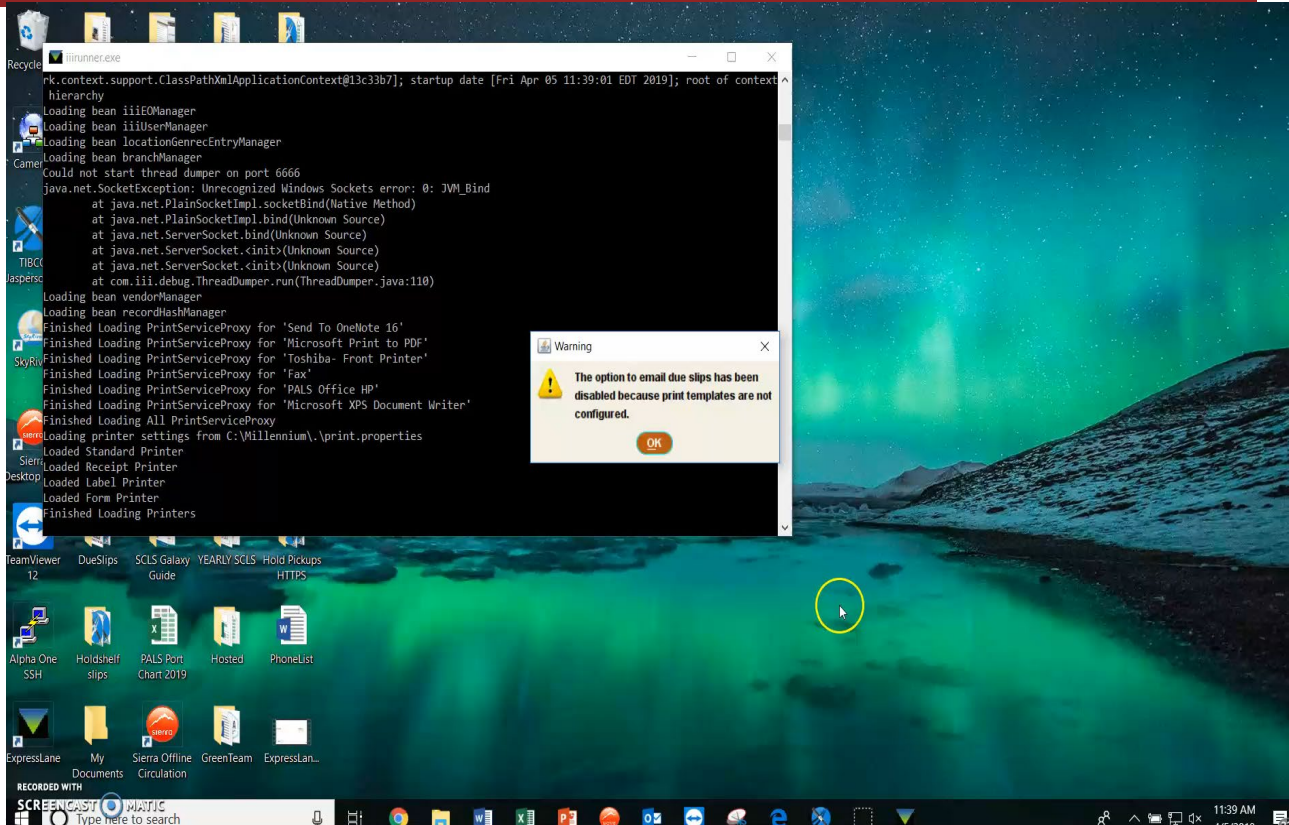
Using Expresslane templates (enabled)



1234512345 followed by Sierra
login with permission

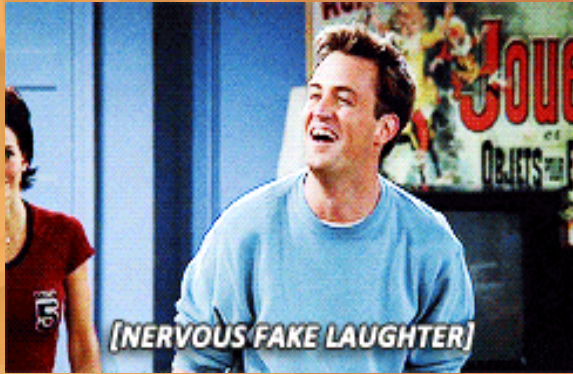
#IUG2019

Importing templates into Expresslanes



- Expresslane login
- Sierra login (right permissions)
- Template code 1234512345
- Printer code 0987654321
- Escape code *different for everyone

I have a headache



- Print & Email Template Basics
- Changing templates with JasperSoft Studios
- Customizing Due Slips (poster)
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- Customizing Courtesy Notices
- Customizing Hold Pickup Notices

Courtesy Notices basics

The screenshot shows the Sierra library system interface. The top navigation bar includes 'File', 'Edit', 'View', 'Go', 'Tools', 'Reports', 'Admin', 'Window', and 'Help'. The 'Admin' menu is open, showing options like 'Change Password', 'Free Records in Use', 'Install Latest Translation Files', 'Settings', 'Options', 'RFID Pad Server Options', 'Parameters', and 'Opt Out SMS Subscriptions'. The 'Parameters' menu is further expanded to show 'General', 'Acquisitions', 'Cataloging', 'Circulation', 'INN-Reach', 'Program Registration', 'Serials', and 'Web Access Management'. The 'Circulation' menu is expanded to show 'Automated Self Check-out Media Types (8)', 'Automated Self Check-out Messages (5)', 'Branch Addresses', 'Collection Agency Settings', 'Days Closed', 'Email Subject', 'Hold Pickup Locations', 'Hold Thresholds (7)', 'Hours Open', 'Loan Rule Determiner', 'Loan Rules', 'Predefined Charges (2)', 'Statistical Group Maintenance', 'Text of Circulation Notices', 'Time to Reshelve', and 'Time to Holdshelf'. The 'Text of Circulation Notices' option is highlighted.

Check Out	0
Checked-Out Items	0
Holds	0
Fines	\$0.00
Check In	0
Linked Patrons	0
INN-Reach	0

Barcode	Title

- Permission 398
- I come from a consortia and we elected to make a uniform response for all our libraries.
- ADMIN | PARAMETERS | CIRCULATION | TEXT OF CIRCULATION NOTICES

Courtesy Notices setup

35 - Courtesy

Text of Circulation Notice

File	Tools
13	Not Used
14	NOT IN USE
15	Not Used
16	Not Used
17	Not Used
18	NOT USED
19	NOT USED
20	NOT USED
21	NOT USED
22	NOT USED
23	NOT USED
24	NOT USED
25	NOT USED
26	NOT IN USE
27	Not Used
28	NOT USED
29	NOT USED
30	NOT IN USE
31	NOT IN USE
32	NOT IN USE
33	NOT IN USE
34	NOT USED
35	Courtesy
36	NOT USED
37	NOT USED
38	NOT USED
39	BILL notice
40	NOT USED
41	NOT USED

Notice Type (English)

Notice Type (Spanish)

Notice Text (English)

This is a friendly reminder that items are coming due soon. Some items may have been renewed for you automatically. Please see below for details.

View your patron account at:
<https://search.livebrary.com/patroninfo>. Thank you!

This email is an automated message. For further information, please contact your local library.

Notice Text (Spanish)

Este es un recordatorio amigable que los artículos llegarán pronto. Algunos los artículos pueden haber sido renovados automáticamente. Por favor mira abajo para más detalles.

Ver cuenta de usuario en:
<https://search.livebrary.com/patroninfo> o contacto su biblioteca local.

NO RESPONDA A ESTE CORREO ELECTRONICO.

This email is an automated message. For further information, please contact your local library.

OK Cancel Print

- Permission 373 & 380
- Max 15 lines & Max 76 characters per line
- You have to add the “text of circulation notice” number into the loan rules

Courtesy Notices Loan Rule setup

The screenshot shows the Sierra library system interface. The 'Admin' menu is open, and the 'Circulation' sub-menu is selected. The 'Loan Rules' option is highlighted. The main interface shows a search bar and a 'Check Out' summary table.

Check Out	0
Checked-Out Items	0
Holds	0
Fines	\$0.00
Check In	0
Linked Patrons	0
INN-Reach	0

- Permission 373 & 376
- ADMIN |
PARAMETERS |
CIRCULATION | LOAN
RULES

Courtesy Notices Loan Rule setup

File	Tools	Name
712	14Day5Ce	14Day5Ce
713	14Day10Ce	14Day10Ce
714	21 Day 5 Ce	21 Day 5 Ce
715	21 Day 10 C	21 Day 10 C
716	21 Day 50 C	21 Day 50 C
717	21 Day \$1	21 Day \$1
718	21 Day No Fr	21 Day No Fr
719	21 Day \$1 \$	21 Day \$1 \$
720	21 Day \$5 \$	21 Day \$5 \$
721	21 Day \$10	21 Day \$10
722	21 Day \$20	21 Day \$20
723	21 Day 5 ce	21 Day 5 ce
724	21 Day 10 ce	21 Day 10 ce
725	21 Day 5Ce	21 Day 5Ce
726	21 Day10Ce	21 Day10Ce
727	21 Day50Ce	21 Day50Ce
728	21 Day \$1 N	21 Day \$1 N
729	21 Day No Fr	21 Day No Fr
730	21 Day\$1\$1	21 Day\$1\$1
731	21 Day\$5\$5	21 Day\$5\$5
732	21Day\$10\$1	21Day\$10\$1
733	21Day\$20\$2	21Day\$20\$2
734	21Day5cent	21Day5cent
735	21Day10cer	21Day10cer
736	21 Day 5 Ce	21 Day 5 Ce
737	21 Day 10 C	21 Day 10 C
738	21 Day 50 C	21 Day 50 C
739	21 Day \$1 C	21 Day \$1 C
740	21 Day \$1\$1	21 Day \$1\$1
741	21 Day \$5\$5	21 Day \$5\$5

Field	Value
Time Third Odue	0
Time Fourth Odue	0
Time Fifth Odue	0
Time Sixth Odue	0
Text First Odue	1
Text Second Odue	0
Text Third Odue	0
Text Fourth Odue	0
Text Fifth Odue	0
Odue Penalty	0
Text First OdueR	1
Text Second OdueR	0
Text Third OdueR	0
Text Fourth OdueR	0
Text Fifth OdueR	0
Courtesy Notice Text Number	35
Number Of Days Before Odue	3
Time 1ST Odue Recall	0
Text Recall Notice	0
Text Pickup Notice	0
Text Cancel Pickup	0
Grace Period For Fines	0

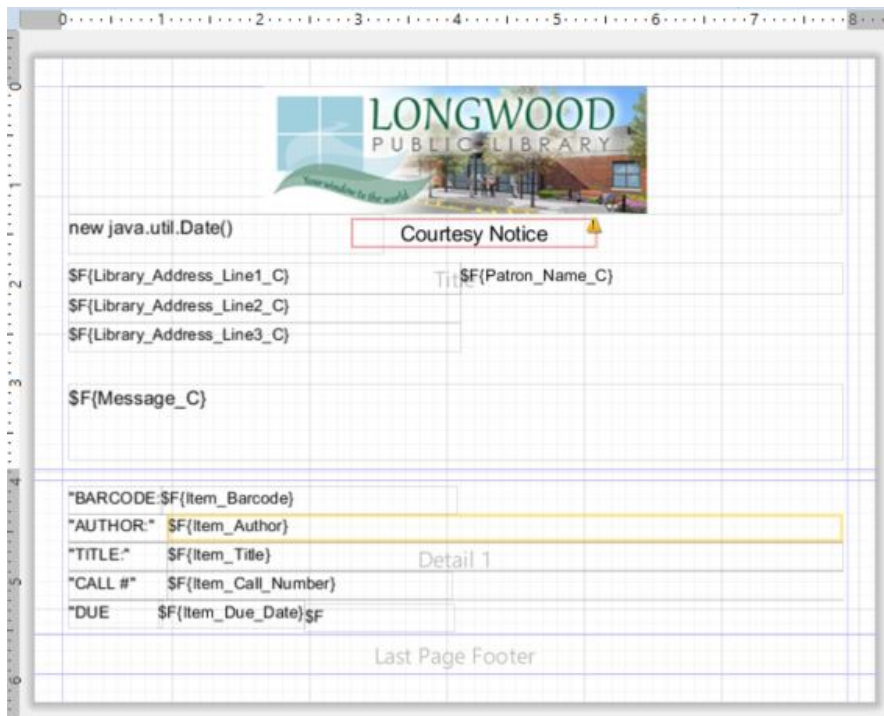
- In this sample circulation notice text 35 matches
- That message will now populate in the courtesy notice based on the loan rules

Courtesy Notice export

The screenshot shows a 'Main Report' window with a grid background. At the top, there's a header area with a small image of a building and a box labeled 'Courtesy Notice'. Below this, there are several rows of fields. The first row contains 'new java.util.Date()'. The second row has '\$F(Library_Address_Line1_C)' and '\$F(Patron_Name_C)'. The third row has '\$F(Library_Address_Line2_C)' and '\$F(Patron_Address_Line1_C)'. The fourth row has '\$F(Library_Address_Line3_C)' and '\$F(Patron_Address_Line2_C)'. The fifth row has '\$F(Patron_Address_Line3_C)'. The sixth row has '\$F(Message_C)' highlighted with a yellow border and a red arrow pointing to it from the right. Below this, there are more fields: '*ITEM #' \$F(Item_ID), '*AUTHOR:' \$F(Item_Author), '*TITLE:' \$F(Item_Title), '*CALL #' \$F(Item_Call_Number), '*BARCODE:' \$F(Item_Barcode), '*LOCATION:' \$F(Item_Location), '*DUE' \$F(Item_Due_Date) \$F, and 'Notice Text #' \$F(Text_Number_C) 'Print Sequence #' \$F(Print_Sequence_C). The window title is 'Main Report' and the zoom level is '110%'.

- Export the generic version which looks like this
- Delete fields you don't need
- Field that comes from the text of notices in Sierra

Courtesy Notice construction



The screenshot shows a grid-based interface for constructing a library notice. At the top, there is a logo for Longwood Public Library with the tagline "Inspired by the world". Below the logo, the text "new java.util.Date()" is visible. A red box highlights the text "Courtesy Notice" with a yellow warning icon. The grid contains several data fields:

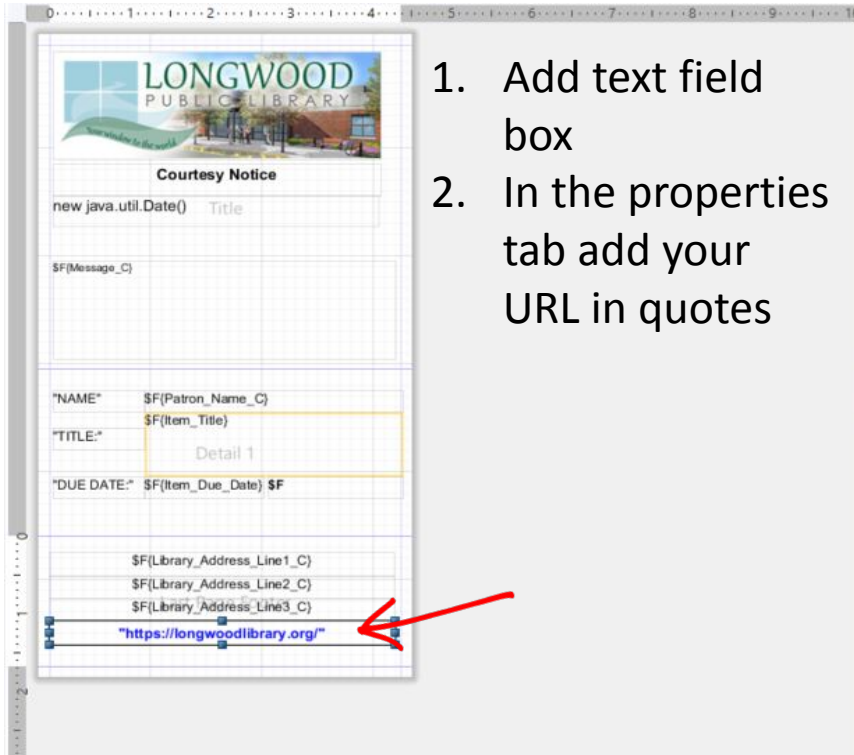
- `$F{Library_Address_Line1_C}`
- `$F{Library_Address_Line2_C}`
- `$F{Library_Address_Line3_C}`
- `$F{Message_C}`
- `$F{Patron_Name_C}`
- `*BARCODE:$F{Item_Barcode}`
- `*AUTHOR:" $F{Item_Author}`
- `*TITLE:" $F{Item_Title} Detail 1`
- `*CALL #" $F{Item_Call_Number}`
- `*DUE $F{Item_Due_Date}$F`

At the bottom of the grid, the text "Last Page Footer" is visible.

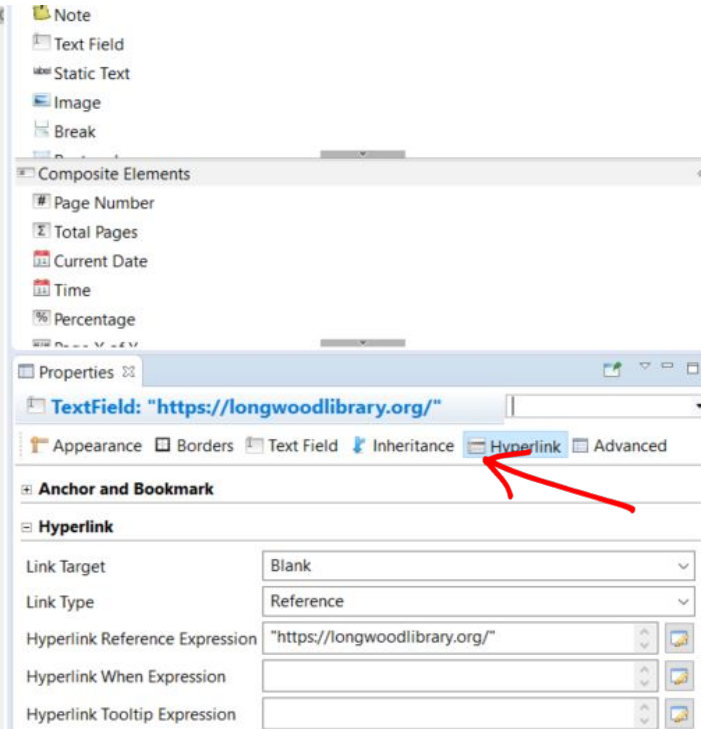
- Changed Library logo
- Removed unused information

Courtesy Notice adding a link part 1

1. Add text field box
2. In the properties tab add your URL in quotes



The screenshot shows a form editor interface for a 'Courtesy Notice'. The form contains several fields: 'Title', '\$F(Message_C)', '\$F(Patron_Name_C)', '\$F(Item_Title)', 'Detail 1', '\$F(Item_Due_Date)', '\$F', '\$F(Library_Address_Line1_C)', '\$F(Library_Address_Line2_C)', '\$F(Library_Address_Line3_C)', and a text field containing the URL 'https://longwoodlibrary.org/'. A red arrow points to the text field containing the URL.



The screenshot shows the 'Hyperlink' properties tab in a form editor. The 'Text Field' contains the URL 'https://longwoodlibrary.org/'. The 'Hyperlink' section is expanded, showing the following properties:

Property	Value
Link Target	Blank
Link Type	Reference
Hyperlink Reference Expression	"https://longwoodlibrary.org/"
Hyperlink When Expression	
Hyperlink Tooltip Expression	

A red arrow points to the 'Hyperlink' tab in the properties window.

Courtesy Notice adding link part 2

LONGWOOD PUBLIC LIBRARY

Courtesy Notice

new java.util.Date() Title

SF(Message_C)

"NAME:" SF(Patron_Name_C)
SF(Item_Title)
"TITLE:" Detail 1

"DUE DATE:" SF(Item_Due_Date) SF

SF(Library_Address_Line1_C)
SF(Library_Address_Line2_C)
SF(Library_Address_Line3_C)

"Here"

3. Add how you want the URL to display in the text field tab with quotes

Note

- Text Field
- Static Text
- Image
- Break

Composite Elements

- Page Number
- Total Pages
- Current Date
- Time
- Percentage

Properties

TextField: "Here" Search Property

Appearance Borders Text Field

Expression "Here"

Evaluation Time Now

Blank When NULL

Stretch With Overflow

Pattern

Pattern Expression

Text Alignment

Rotation

Font

SansSerif 10

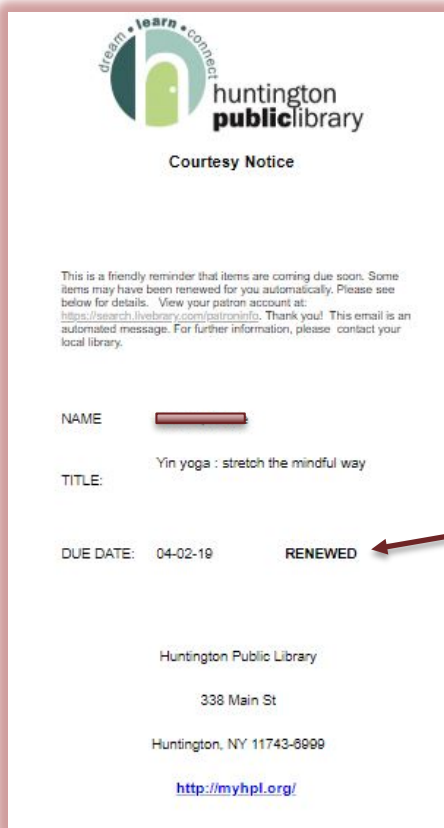
Markup none

Courtesy Notice adding link part 3

The screenshot shows a software interface with a 'Main Report' window. A 'Forecolor' dialog box is open, displaying a color picker with a blue color selected. The dialog includes fields for 'New color', 'Actual color', 'Transparency' (set to 255), and color selection options (H, S, B, R, G, B, Hex). The 'Hex' field contains '#F0F5FA'. The 'Properties' panel is open to the 'Appearance' tab, showing a 'Forecolor' property with a blue color swatch. Red arrows point from the 'Forecolor' property in the 'Properties' panel to the 'Forecolor' dialog box.

4. Highlight the text box
5. In the appearance tab click the forecolor box
6. Click the eye dropper, navigate to your desired color and hit the space or insert your RGB color

Courtesy Notices Sample



- [https image](#)
- Text of circulation notice
- [URL link](#)
- Autorenew added (at least Sierra 4.0)
- Library address


It's the last day.



- Print & Email Template Basics
- Changing templates with Jaspersoft Studios
- Customizing Due Slips (poster)
- Importing templates into Express Lanes
- Customizing Courtesy Notices
- Customizing Hold Pickup Notices

Customizing Hold Pickups

Using everything you learned today you can now:

	
Greetings from your library!	
new java.util.	Hold Pickup Notice
\${Patron_Name_C}	
\${Patron_Barcode}	
\${Message_C}	
TITLE:	\${Item_Title}
AUTHOR:	\${Item_Author}
PICKUP LOCATION:	\${Item_Pickup_Location}
PICKUP BEFORE:	\${Item_Pickup_By_Date}
If the requested item is no longer needed you can cancel your hold "here."	
Visit us at:	
Babylon Public Library 24 South Carl Ave Babylon, NY 11702 (631) 669-1624	
http://babylonlibrary.org	

- Add a logo
- Customize wording
 - In Sierra
 - In Jaspersoft
- Add a Clickable URL or 2
 - Customize color
 - Customize link

Customized Hold Pickup



Comsewogue Public Library

170 Terryville Road
Port Jefferson Station, NY 11776
Tel.631.928.1212 • Fax.631.928.6307
www.cplib.org



Greetings from your library!

07/31/2018

Hold Pickup Notice

The item below is ready for pickup. Please pick it up as soon as possible. Thank you. Contact your library for more information at <https://www.livebrary.com/local-libraries> PLEASE DO NOT REPLY TO THIS EMAIL

TITLE: SCLS TEST RECORD Various Titles
AUTHOR:
PICKUP LOCATION: Comsewogue Library

If the requested item is no longer needed you can cancel your hold [here](#).

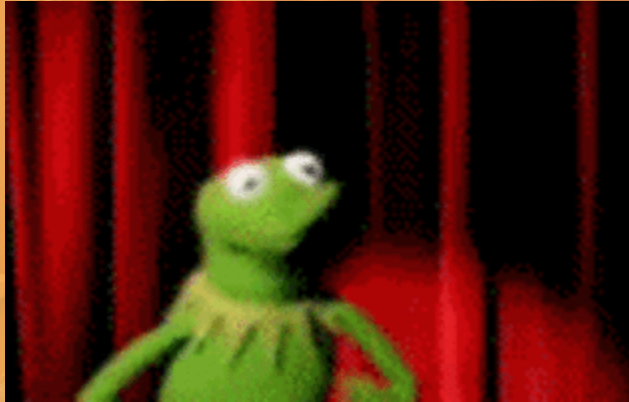
Comsewogue Public Library
170 Terryville Road
Port Jefferson Station, NY 11776-1369
(631) 928-1212



#IUG2019

IUG2019 
Phoenix, AZ

Oh for Pete's sake



- Print & Email Template Basics
- Changing templates with JasperSoft Studios
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- Importing templates into Express Lanes
- Customizing Courtesy Notices
- Customizing Hold Pickup Notices

A Special Thanks to:



Karen Perone

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Richard Jackson

Sierra Listserv

Questions??



Thanks for coming!



Eric Frank

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System

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