



Refreshing Your Sierra System

Leigh Duncan, Wright State University

About Our Sierra System

Wright State University Libraries – Main Campus

Lake Campus

College of Education Resource Center

Kettering College

Dayton-area hospitals

- Dayton Children's Hospital
- Kettering Medical Center
- Grandview Medical Center
- Miami Valley Hospital
- VA Medical Center

Sierra Administration

Sierra Admin
App

Admin
Corner

Sierra Desktop
App

ASAA

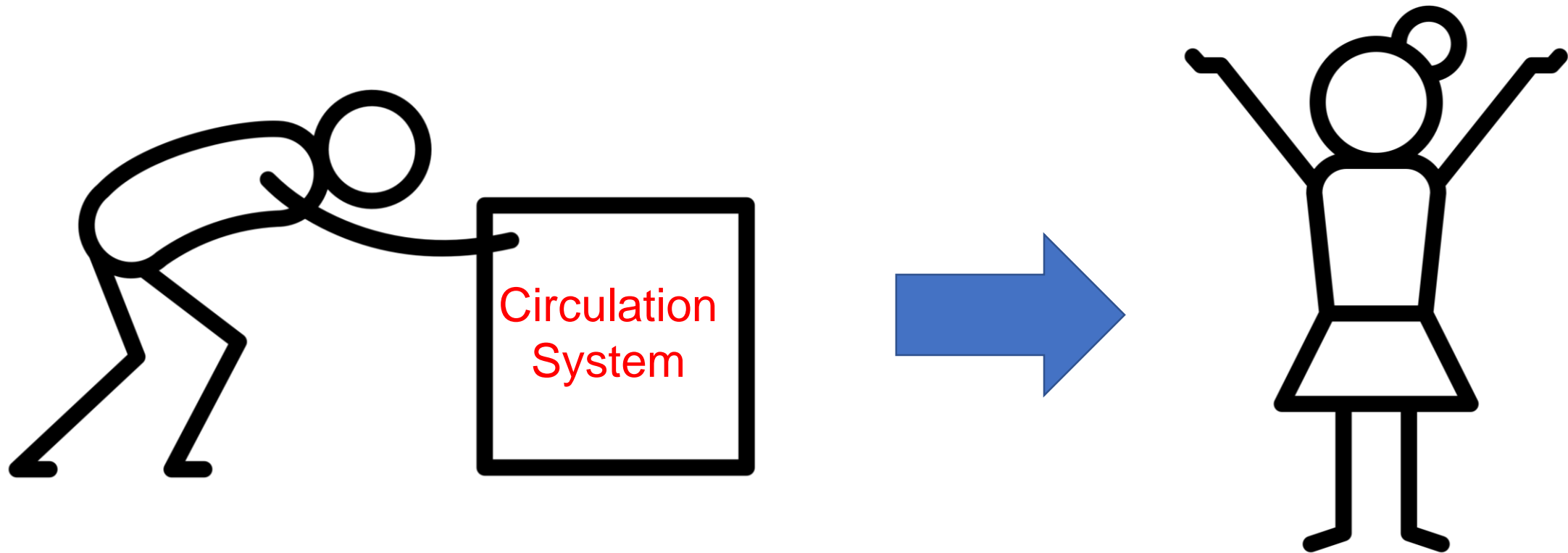
Sierra Services

- Circulation Materials
- Reserving/Booking Library Materials
- Authentication Source
- Print Book/Journal Acquisitions
- Serials Check-in
- Catalog
- E-Resource Management
- and more . . .



Why?

Flexibility and Agility





How?

The Plan

1. Examine the central database tables to see if any unused codes could be deleted: Branches (Locations), Patron Types, Item Types
2. Determine if there are any unused Loan Rules
3. Reduce the number of notice texts
4. Investigate usage for catalog scopes and review for possible removal
5. Implement print templates for circulation notices
6. Implement auto-renewals



#1 – (Branch) Location Codes

(Branch) Location Codes - Process

1. Function=Statistics
2. Run a fixed-field report for item records
3. Choose the Location Report and look at the Record Count column
4. If there are no records using the location code, it will not display in the report. Be sure to compare the Branches table entries to the statistics report
5. Note any locations that have 10 or fewer items—these are your no-use or little-use location codes

(Branch) Location Codes - Report

Select Report	Wright State University Libraries		
COPY #	Report for the fixed fields - item		
ICODE1	Range = i1000000-4684586		
DISPLAY	1387332 records were processed. (2297255 records had been deleted.)		
I TYPE	<		
OUT LOC			
IN LOC			
LOCATION			
LOANRULE			
STATUS			
IMESSAGE			
OPACMSG			
All Fields			
	Code	Meaning	Record C...
	02100	Kettering College	27642
	02101	Kettering College Audio Visual	4522
	02103	Kettering College Reserve	645
	02104	Kettering College Reserve	38
	02105	Kettering College Reserve	94
	02106	Kettering College Reserve	19
	02107	Kettering College Reserve	2

(Branch) Location Codes - Process

6. Run a fixed-field stats report for bibs and all other attached record types; determine if the locations identified as no-use or little-use are present on these stats reports. Locations that are not included on any report are your most likely to be deleted codes.
7. After running these reports, you'll have a list of unused or little-used location codes.
8. Consult with stakeholders (in my library that's mainly our technical services department) and determine which locations can be deleted
9. Review relevant documentation before deleting Branch codes

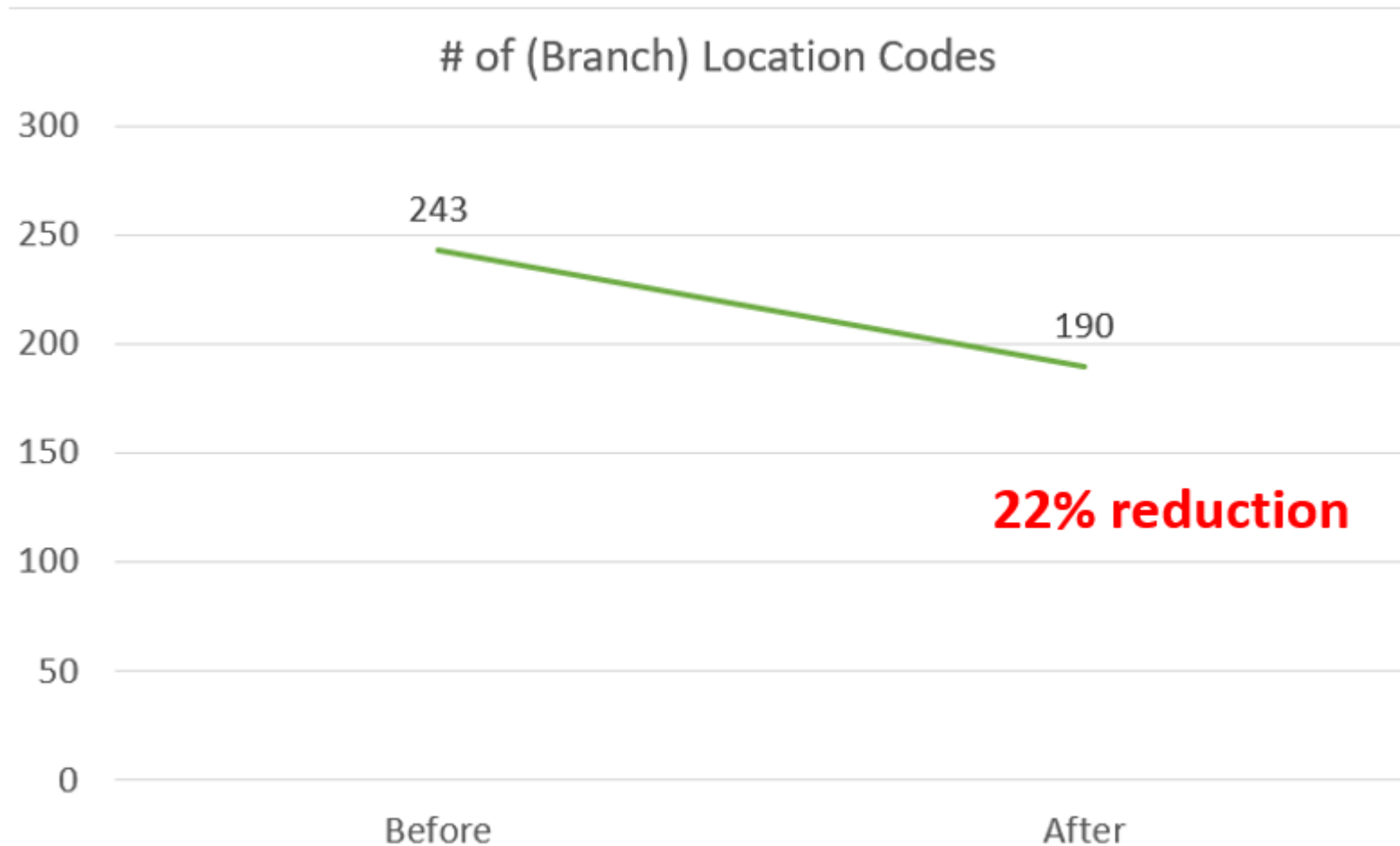
(Branch) Location Codes - Process

Review relevant documentation before deleting any codes

- Branch codes are used in other areas of the system, including:
 - Scoping
 - Locations Served
 - Hold Pickup Locations
 - Days Closed/Hours Open
 - Loan Rule Determiner
 - Link Maintenance
 - System Options
 - Record Templates
 - and more . . .

TIP: Delete Branch codes from all other areas of the system first; the Branches table should be the last place you delete the code

(Branch) Location Codes - Statistics





#2 – Catalog Scopes

Catalog Scopes

The screenshot shows the Wright State University Libraries Catalog homepage. At the top, there is a green navigation bar with the 'W' logo, 'UNIVERSITY LIBRARIES', 'SPECIAL COLLECTIONS & ARCHIVES', 'CORE SCHOLAR', and 'MY ACCOUNT'. Below this is the main title 'UNIVERSITY LIBRARIES CATALOG'. A search bar is present with a 'Keyword' dropdown, a search input field, and a 'Search' button. To the right of the search bar is a 'View Entire Collection' dropdown menu, which is currently open, showing a list of collection scopes. The 'View Entire Collection' option is highlighted in blue. Below the search bar, there are two main sections: 'NEW BOOKS & MEDIA' and 'ASK A LIBRARIAN'. The 'ASK A LIBRARIAN' section features a green speech bubble icon with the text 'ASK A LIBRARIAN'. At the bottom, there is a green footer with the Wright State University logo, address, and copyright information. A red box highlights the dropdown menu.

W UNIVERSITY LIBRARIES SPECIAL COLLECTIONS & ARCHIVES CORE SCHOLAR MY ACCOUNT

UNIVERSITY LIBRARIES CATALOG

Keyword View Entire Collection

- View Entire Collection
- Dunbar Library - Books
- Dunbar Library - Course Reserves
- Dunbar Library - Media
- Dunbar Library
- Journals
- Reference
- Media
- E-books
- Music Recordings
- Music Scores
- Archives
- Dayton Children's Hospital
- Educational Resource Center
- Grandview Hospital
- Kettering College
- Kettering Medical Center
- Lake Campus
- Miami Valley Hospital
- VA Medical Center

NEW BOOKS & MEDIA

Explore new materials in your subject area that have recently been purchased by the University Libraries or made available through institutional subscriptions.

[VIEW NEW BOOKS & MEDIA >](#)

ASK A LIBRARIAN

Get your questions answered by a librarian through our chat service, an individual research appointment, or our 24/7 research guides.

ASK A LIBRARIAN

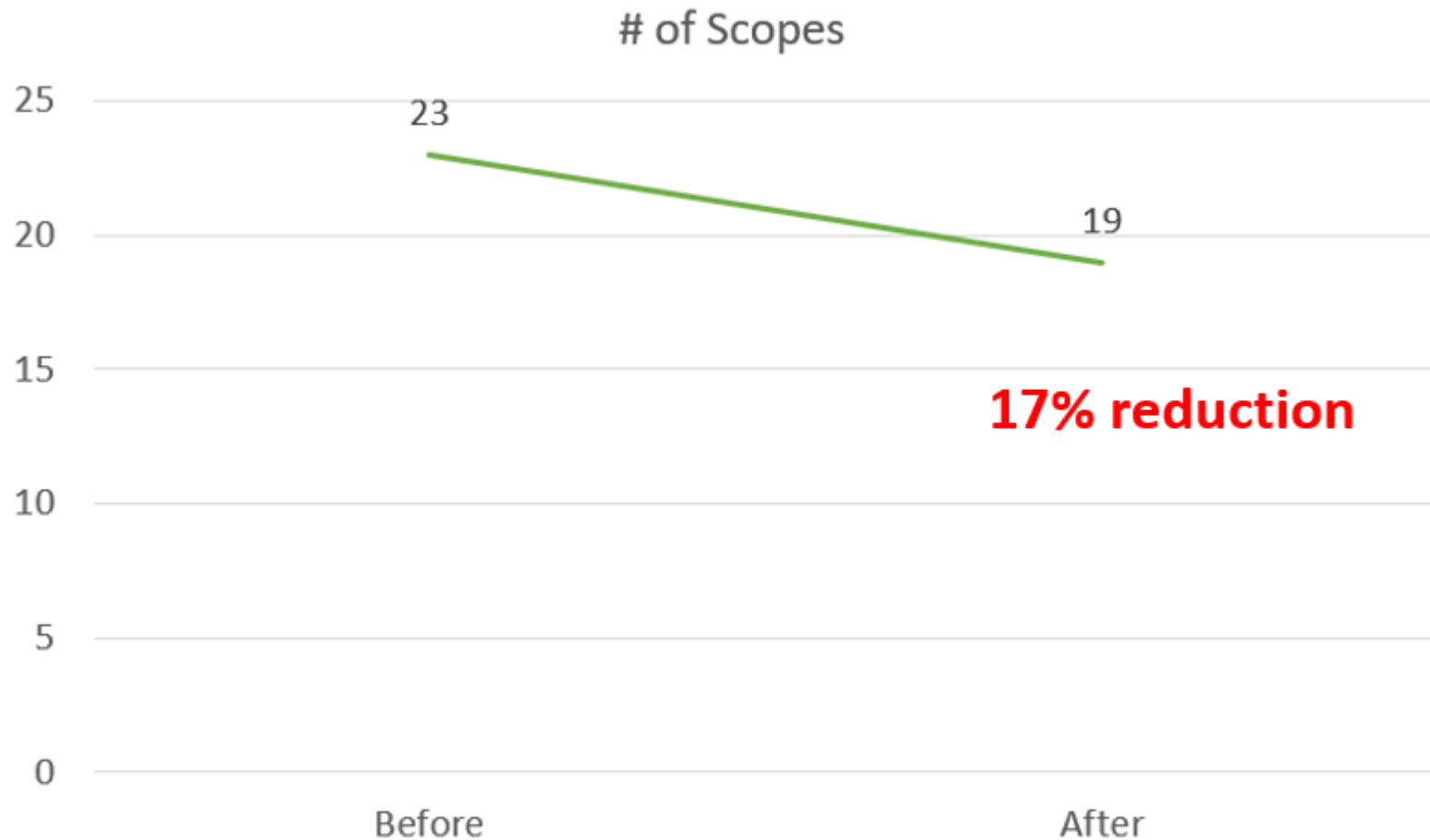
WRIGHT STATE UNIVERSITY UNIVERSITY LIBRARIES 3640 Colonel Glenn Highway, Dayton, Ohio 45435 | (937) 773-3100 Copyright © 2018 | Wright State University Libraries Accessibility

IUG 2020 MINNEAPOLIS

Catalog Scopes - Process

1. If you use Google Analytics, review rudimentary scope usage statistics
2. Work with stakeholders to determine which scopes to delete
3. Work with III to remove locations from scopes
4. Reorder remaining scopes, as needed

Catalog Scopes - Statistics





#3 – Patron Types

Patron Types - Process

1. Function=Statistics
2. Run a cross-tab report on patron records, looking at the ptype and home library fields
3. Choose the Record Count report and look for any ptypes with a low number in the Total column

Note: Again, ptypes with zero uses will not display; compare your Patron Types table with the statistical report to identify any ptypes not in use

4. Consult with stakeholders to determine which codes can be deleted

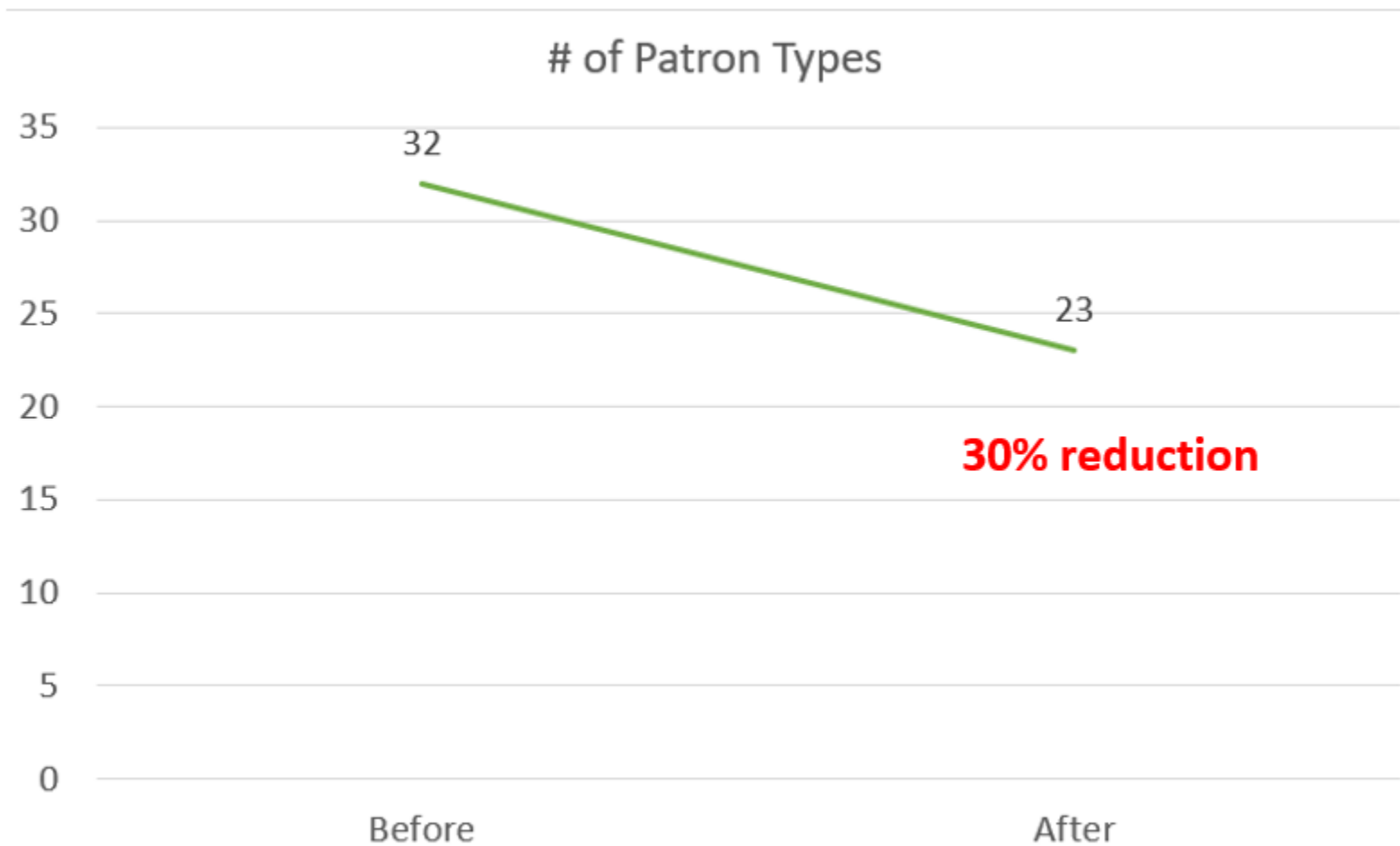
Patron Types - Process

- Patron Types are used in other areas of the system, including:
 - Patron Blocks
 - Loan Rule Determiner
 - System Options
 - Record Templates
 - WWWOptions

*If applicable, work with your inn-reach system administrator to update your patron type mapping with central.

TIP: Delete Patron Types from all other areas of the system first; the Patron Types table should be the last place you delete the codes

Patron Types - Statistics





#4 – Loan Rules

Loan Rules - Warning

Warning:

“***Do not*** delete, reorder, or insert entries in the **Loan Rules** table. The system identifies loan rules by their numerical position in the **Loan Rules** table. Changing the order of entries in the table causes the system to apply the wrong loan rule parameters system-wide. You can append new entries to the end of the table or reuse entries that are not currently used to circulate items.”

--Sierra Web Help manual

Loan Rules - Process

1. Open the Loan Rule Determiner table
2. Sort by the Loan Rule column
3. Note any loan rules numbers not in use (e.g. if you see entries for loan rules 1,2,3,5 then you know loan rule #4 is not currently being used)
4. Go to Function=Create Lists and create an item record list looking for any of your unused loan rule numbers in the Loan Rule field
5. If the loan rule is not being held in the Loan Rule field of the item record, it is a candidate for “removal”

Loan Rules - Process

▪ OK TO REUSE

- If the loan rule is not being used for current circulation AND is it not being used in the Loan Rule field in any item records, change the name of that rule to something like OK TO REUSE

DO NOT DELETE

- If the loan rule is not being used for current circulation, but it is being used in the Loan Rule field of item records, change the name of that rule to something like DO NOT DELETE or DO NOT REUSE

Loan Rules - Process

Our Loan Rules table showing rules labeled OK TO REUSE and DO NOT DELETE

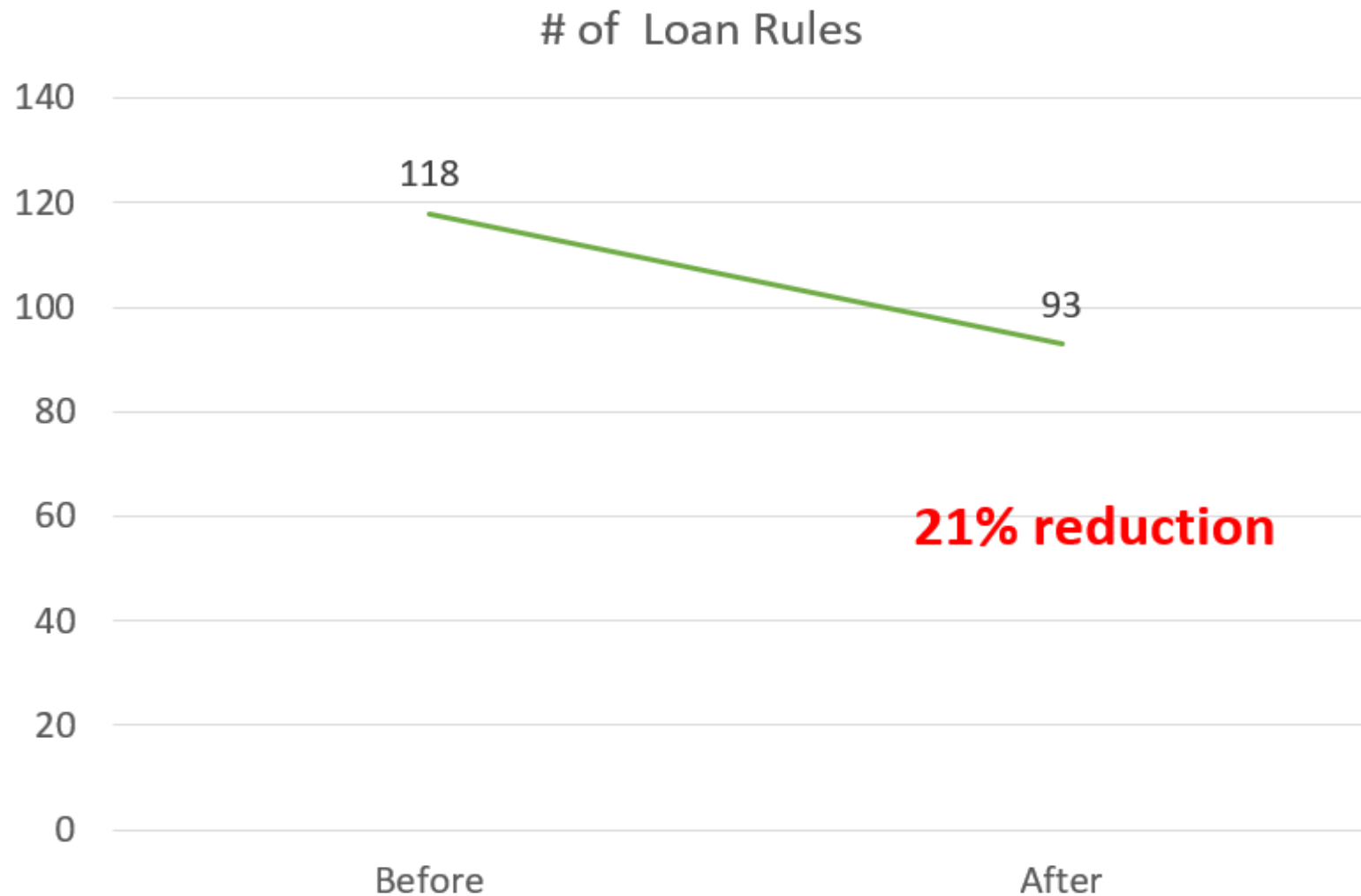
	Name	Code	Normal Loan Pe...	Holdable	Bookable	Home Pickup	Shippable
19	OK TO REUSE	R	7	y	n	n	n
20	KMC 14day L...	R	14	y	n	n	n
21	Grandview 2...	R	21	y	n	n	n
22	MVH 21-day	R	21	y	n	n	n
23	DO NOT DELE...	R	28	y	n	n	n
24	DO NOT DELE...	R	77	y	n	n	n
25	OK TO REUSE	J	2	y	y	n	n
26	UL 24hr	J	24	n	y	n	n
27	UL 3hr	J	3	n	n	n	n

Loan Rules – System Option

#39 - Renewals: Check loanrule at time of renewal

- YES: allows the system to check the loan rule determiner table at the time of renewal; if the loan rule has changed, the new loan rule will dictate the renewal parameters

Loan Rules - Statistics





#5 – Notice Texts

Notice Texts

- 9 libraries sharing 1 Sierra system
 - 5 sets of overdue notices
 - 4 sets of hold pickup/cancellation notices
 - 3 sets of bills
 - 2 sets of all other notices

Notice Texts - Goals

■ Goals

1. Consolidate as many notices as possible
2. Remove any negative or punitive language
3. Make the text clear and concise (knowing most people skim e-mails at best)

Notice Texts - Process

1. Admin > Parameters > Circulation > Text of Circulation Notices
2. Copy and paste notice texts into a spreadsheet
3. Evaluate texts for duplication; determine which can be consolidated
4. Consult with stakeholders and determine which notices to consolidate
5. Determine which loan rules are using the affected notices and prepare a plan to update the loan rules*

*I created an Access database of loan rules and notice texts—I can quickly query which rules contain a certain text #

Notice Texts

Notice Type	Notices	New Text
Adjustment	16,34	Thank you for returning questions.
	71	This is a statement of fines on library materials. WSU students and staff are responsible for their library materials. If you have a library account link?

Add'l Renewal Period	Max # Renewals	Max # Auto Renewals	Minimum Use
42	6	6	42
7	3	3	7
21	6	6	21
7	3	3	7
21	3	3	21
14	1	1	14

Keep original version

Does the text content change substantially?

Yes: Update UL text now; keep Affiliate text pending approval of new text. Check Loan Rule database; note where texts being consolidated are.

No: Update and consolidate texts. Check Loan Rule database; note where texts being consolidated are used.

Notice Type/Name	New Text #	Text Change	Link required
1 UL 1st od Fac/Staff	1 yes	yes	n
2 UL 2nd od Fac/Staff	2 yes	yes	n
3 UL 3rd od Fac/Staff	3 yes	yes	n
4 UL Hold Pickup	4 yes	no	n
5 drop hold UL unclaim	5 yes	no	n
6 drop hold UL cancel	6 yes	no	n
7 UL Bill Fac/Staff	7 yes	no	n
8 OLD UL/HSL Adjust	8 no	no	n

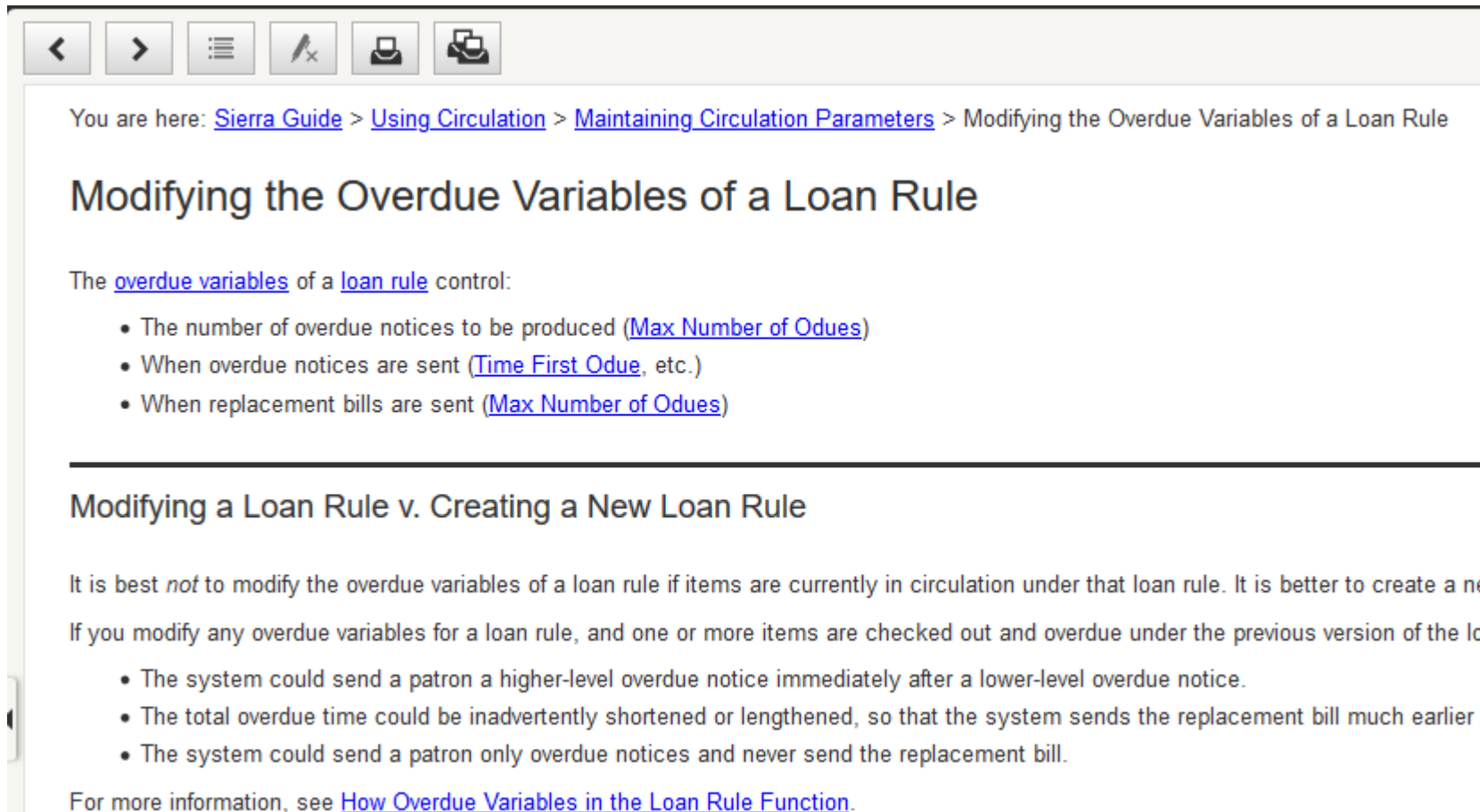
Code	Loan Period	Holdas
N	0 y	n
N	0 n	n
R	7 v	n

Name	Current Text	New Text
UL 1st OD Fac/Staff	This notice was produced automatically on the 7th day this material was overdue to remind you to renew or return as soon as possible. View your account to renew: http://wsuol2.wright.edu/patroninfo	This is the first notice that your library materials are overdue. Please renew or return as soon as possible. Contact your home library or reply to this e-mail with questions.



Notice Texts - Documentation

- Before making changes, we consulted Sierra documentation:



The screenshot shows a web browser window displaying a page from the Sierra Guide. The breadcrumb trail at the top reads: "You are here: [Sierra Guide](#) > [Using Circulation](#) > [Maintaining Circulation Parameters](#) > Modifying the Overdue Variables of a Loan Rule". The main heading is "Modifying the Overdue Variables of a Loan Rule". Below the heading, the text states: "The [overdue variables](#) of a [loan rule](#) control:" followed by a bulleted list:

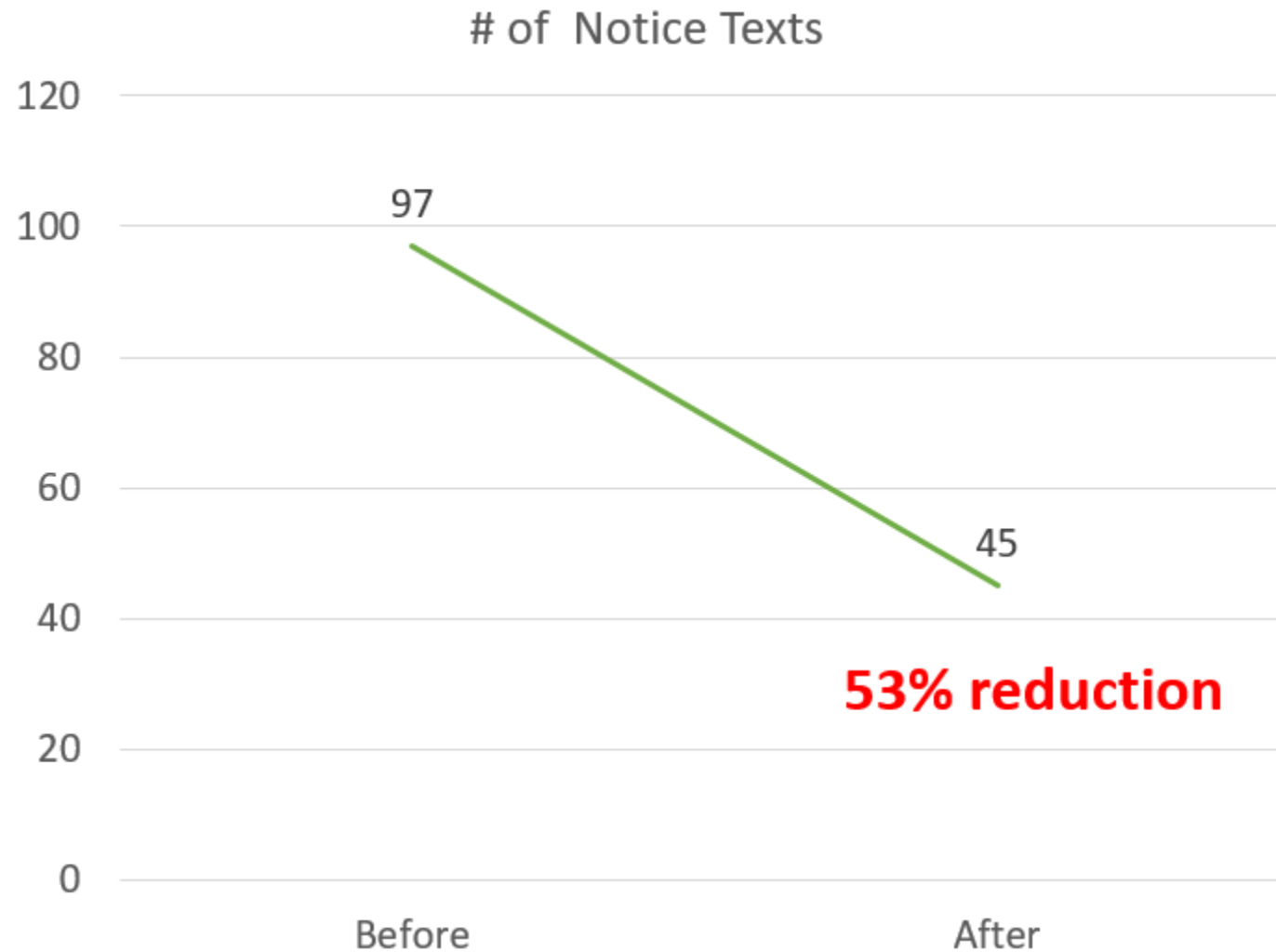
- The number of overdue notices to be produced ([Max Number of Odues](#))
- When overdue notices are sent ([Time First Odue](#), etc.)
- When replacement bills are sent ([Max Number of Odues](#))

The next section is titled "Modifying a Loan Rule v. Creating a New Loan Rule". The text explains: "It is best *not* to modify the overdue variables of a loan rule if items are currently in circulation under that loan rule. It is better to create a new loan rule." It then states: "If you modify any overdue variables for a loan rule, and one or more items are checked out and overdue under the previous version of the loan rule, the following issues could occur:"

- The system could send a patron a higher-level overdue notice immediately after a lower-level overdue notice.
- The total overdue time could be inadvertently shortened or lengthened, so that the system sends the replacement bill much earlier or later than expected.
- The system could send a patron only overdue notices and never send the replacement bill.

For more information, see [How Overdue Variables in the Loan Rule Function](#).

Notice Text - Statistics



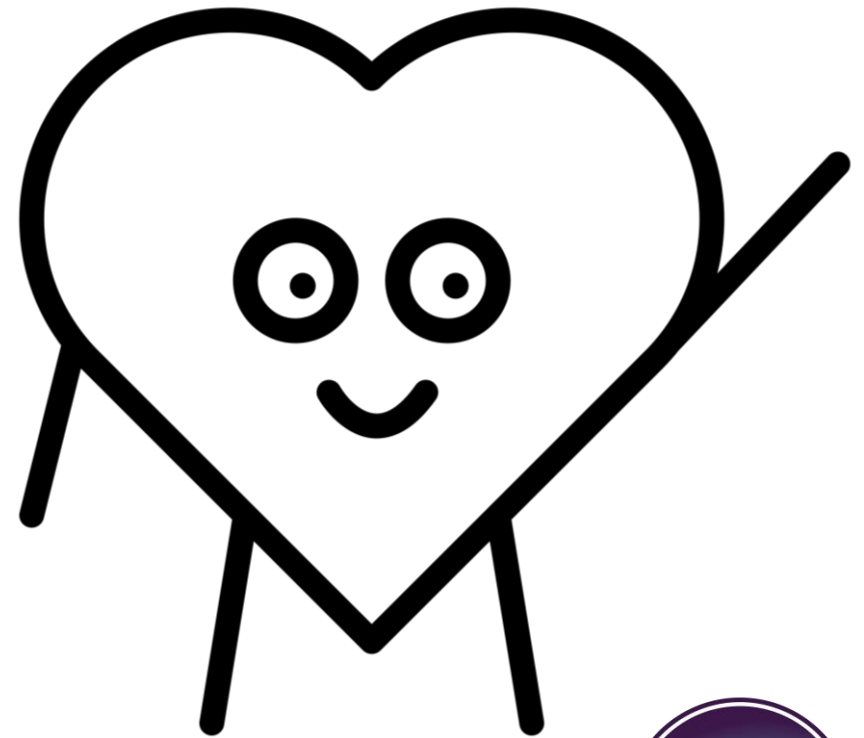
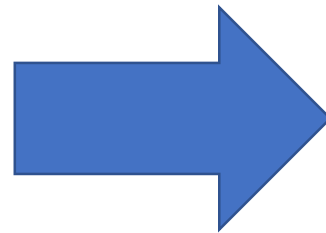
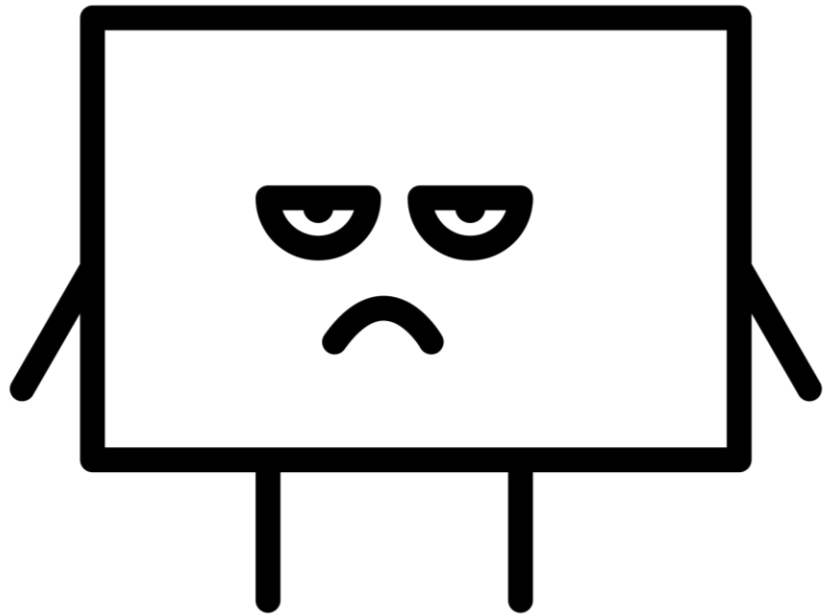


Print Templates for Circulation Notices

Circulation Print Templates

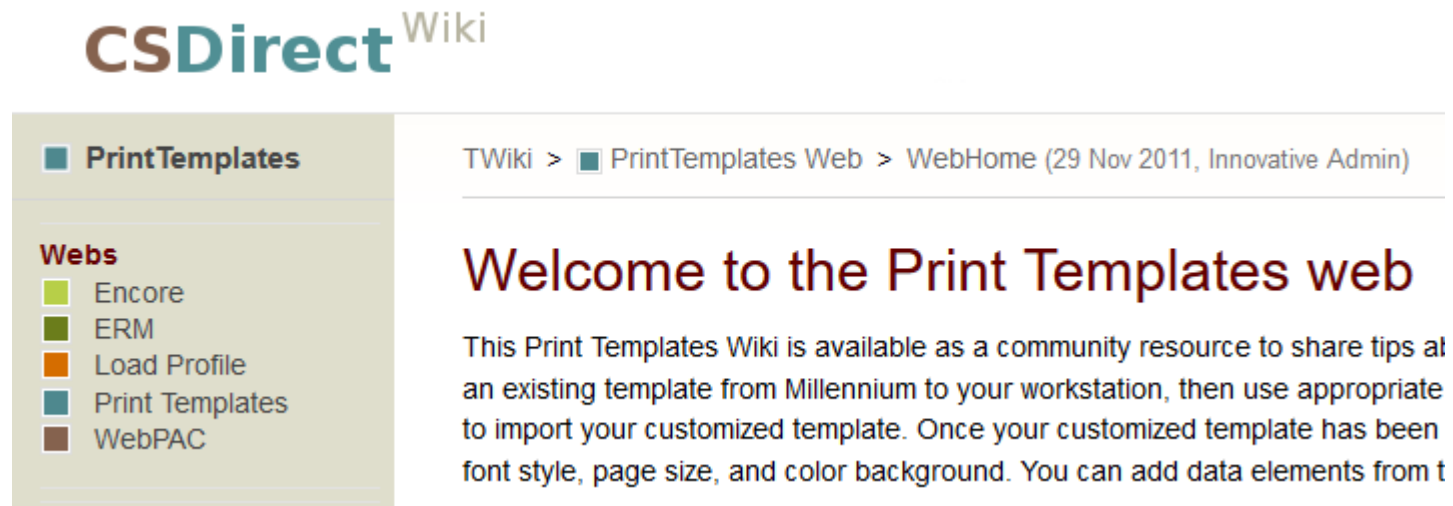
- Templates to create:
 1. Courtesy (required for auto-renewals)
 2. Hold Pickup
 3. Hold Cancellation
 4. Overdue
 5. Hourly Overdue
 6. Recall
 7. Bills
 8. Fines
 9. Adjustments
 10. Manual Fines

Jaspersoft Studio



Circulation Print Templates - Documentation

- CSDirect Print Templates wiki: <https://csdirect.iii.com>



The screenshot shows the CSDirect Wiki interface. At the top left, the logo reads "CSDirect Wiki". Below it, a navigation menu lists "PrintTemplates" as the active page. A sidebar titled "Webs" contains a list of categories: Encore, ERM, Load Profile, Print Templates, and WebPAC. The main content area displays a breadcrumb trail: "TWiki > PrintTemplates Web > WebHome (29 Nov 2011, Innovative Admin)". The main heading is "Welcome to the Print Templates web". The introductory text states: "This Print Templates Wiki is available as a community resource to share tips at an existing template from Millennium to your workstation, then use appropriate to import your customized template. Once your customized template has been font style, page size, and color background. You can add data elements from t".

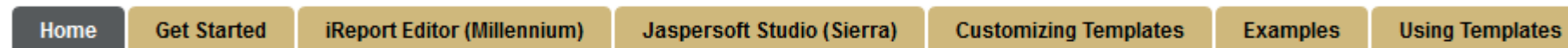
Circulation Print Templates - Documentation

- Print Templates LibGuides – University of Colorado (<https://libguides.uccs.edu>)



[Kraemer Family Library](#) / [LibGuides](#) / [Print Templates 102](#) / [Home](#)

Print Templates 102: Home



Welcome!

This guide builds on the basic skills outlined in our [Print Templates 101](#) guide. Some of the advanced techniques you'll find in this guide include:

- Adding Images to a template
- Using JavaScript
- Adding Barcodes

We provide many examples which illustrate how to use both basic and advanced techniques to format templates to suit your institutions needs.



Circulation Print Templates – Quality Control

Circulation Print Templates – Quality Control

Logo

- Logo URL: <https://www.libraries.wright.edu/assets/images/resources2017/UL-logo-notice.png>
- Logo properties: check “Lazy”
- Logo border: width 1, color white, #FFFFFF

Fonts

- Notice name: 20
- Date/Address/Name/Message: 14
- Item information: 12

Spacing

- Source code added:

```
<property name="net.sf.jasperreports.export.html.header" value="&lt;head&gt;&lt;style&gt;table p { margin: 0; }&lt;/style&gt;&lt;/head&gt;"/>
```

Circulation Print Templates – Testing

- Sierra Documentation – “Selecting Notice Parameters”

When you generate notices for a specific branch location or set of locations served, the system uses different criteria for different notice types to determine whether the notice belongs to the selected location:

Notice Type	Selected Location Must Match
Hold pickup and cancellation notices	The hold's pickup location.
Manual fine notices	The location selected by staff when adding the fine to the patron's record.
All other notice types	The LOCATION fixed-length field in the item record for which the notice is being prepared.

Circulation Print Template - Example

WRIGHT STATE
UNIVERSITY

UNIVERSITY LIBRARIES

Courtesy Notice

February 26, 2020
Wright State - Dunbar Library
937-775-2525

[View Your Account](#)

This is a reminder that library materials may be due soon. Item(s) eligible for renewal have been automatically renewed. View due dates and renewal status below. Contact your home library or reply to this e-mail with questions.

Anthology of classical myth : primary sources in translation.

Call #: PA3621 .A585 2016
Barcode: 404-313304925ci3ug
Date Borrowed: 01-17-20 08:13AM
Date Due: 02-28-20

The face of battle / John Keegan

Keegan, John, 1934-2012
Call #: D25 .K43 1976
Barcode: 1002633254ou4ug
Date Borrowed: 01-17-20 08:13AM
Date Due: 04-10-20

RENEWED



#IUG2020



Jaspersoft Studio Tips

- To get the logo image to display properly, check the “*lazy*” box on the **Properties** tab in the **Image** section
- To insure multiple items appear on the notices, I checked the “*ignore pagination*” box on the main template **Properties** tab in the **Report** section
- To reformat the patron’s name as FirstName LastName, use the **java expression** available on the CSDirect wiki

Caveat

****These instructions are based on my experience with our Sierra system****

****Consult the Sierra Web Help manual before making system changes****

What's Next

- Item Types
- Options Groups
- Implementing circulation print templates for our hospital libraries

What's Next For You?

- What refresh projects have you done?
- What sort of maintenance do you do on a regular basis?
- What projects are on your wish list?

Questions/Comments?

Thank You!

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Selected Works: https://works.bepress.com/leigh_duncan/