EXPLORING SIERRA'S HIDDEN GEMS

PRECIOUS TIDBITS FOR IMPROVING YOUR WORKFLOW

OBJECTIVES

- Discover the capabilities of Sierra.

- Examine ways to incorporate these features into your workflow.

- Learn what your peers are doing.

- It is my hope that you will walk away with at least one new thing that can help you out in the library.

FOCUS

- Macros

- Browse Queries

- Create Lists

- Search Range feature

- High Demand Holds

- Reinstate Fine

- Merge Identical Patrons

- Linking Patrons

- Emailing Receipts/Slips

NOTE

- Some of these features may need to be enabled by Maine InfoNet staff before you are able to see and utilize them.

- Not all of the features we will discuss are new.

MACROS

Use them to…

- Create shortcuts to your functions (checkout, check in, create lists, catalog, serials).

- Create macros for commonly used notes, messages, addresses, cataloging information or searches.

- Use macros for diacritics that you use frequently.

Where to find them on the website –

URSUS - http://www.maineinfonet.org/ursus/support/circulation-resources/sierra-circulation-manual/

Minerva - http://www.maineinfonet.org/minerva/support/circulation/sierra-circulation-manual/

Settings ✕

| No Modifier | ALT | CTRL | **SHIFT** |

F1	%ALT+g%c%g%s
F2	%ALT+g%c%g%samerican
F3	%ALT+g%c%g%sjournal of
F4	%ALT+g%c%g%dmaine history
F5	
F6	%ALT+g%n
F7	
F8	%ALT+g%d%f
F9	
F10	
F11	
F12	

Reset

Save Settings | OK | Cancel

BROWSE QUERIES

- Use it for quick and concise searches (Max…5,000 records)

- Lists that do not need to be retained
  - Since it isn't retained, you don't have to follow the standards for keeping the review files in Create Lists organized.

- In Catalog Function, Tools>Browse Query

Examples:
  - Patron phone numbers
  - Patron email addresses
  - Notes/Messages in item records
  - View hold information

Browse Query

Store Record Type: PATRON p ▼

| Index ▼ | BARCODE (b) ▼ | 23972000000000 | to | 23972999999999 |

Term	Operator		Type	Field	Condition	Value A	Value B	
1			PATRON	Telephone	has	581-3088		
2	OR		PATRON	Telephone2	has	581-3088		

PATRON Telephone has "581-3088" OR PATRON Telephone2 has ""

Group

Ungroup

Insert Line

Append Line

Delete

Clear All

Search   **Use Existing Search**   **Retrieve Saved Query**   **Close**

CREATE LISTS

Allows you to choose a review file large enough to contain the search and retain it for future use

- Search an indexed range, existing review file or a specific range
- Use an existing search
- Retrieve saved query

Examples:

- Compile review files for weeding
- Create patron expiration lists to export into a mail merge
- Items that haven't circulated
- Use in conjunction with Statistics

File   Edit   View   Go   Tools   Admin   Reports   Help

sierra

FUNCTION   Create Lists ▼

Append   Dedupe   Copy   Empty   Rename   Own   Release   Cancel

Review Files

Saved Searches

Saved Sorts

Saved Lists

Saved Exports

Review Files

All ▼ | Search Records | Sort Records | List Records | Export Records | Show Records | Show Info |

File	Name	Current Records	Max Records	Type	Status	Login	Created [date/time]
1		0	5000		empty		
2	~SYS kbk ya change	2617	5000	b	complete	arevitt	07-24-2014 / 22:56'09
3	LPL 10-21-14 id kj	483	5000	p	complete	kjones	10-21-2014 / 14:12'44
4	EC rev list 137 name 039 2/19/14	35	5000	a	complete	econway	02-19-2014 / 10:20'08
5	SJC - Test BV list	409	5000	i	complete	sdavis	11-11-2014 / 11:44'18
6	+=sys test	965	5000	i	complete	neubanks	11-12-2014 / 14:33'03
7	SKI NEW ADDITIONS OCT2014	1	5000	i	complete	skicirc	11-08-2014 / 10:17'54
8	uni audiobooks ln	97	5000	i	complete	lnason	11-09-2014 / 19:21'13
9	Load: Overlaid records for MSTLNAMN.10(04-17-2014)	25	5000	a	complete	econway	09-08-2014 / 12:02'04
10	SCA billed 10/31/14 dm	43	5000	i	complete	dmenard	10-31-2014 / 12:40'48
11	JML MAINE SPECIAL COLLECTION	1145	5000	i	complete	kwoodside	09-16-2014 / 13:19'48
12	Load: Overlaid records for testBibs907(06-19-2014)	19	5000	b	complete	neubanks	09-09-2014 / 16:29'24
13	CML chris 11.13.14 active new	1256	5000	p	complete	cmlcirc	11-13-2014 / 11:56'00
14	Hob Patrons 11/13/14	2468	5000	p	complete	aromer	11-13-2014 / 13:13'29
15	Hob Patron Type	0	5000	p	complete	aromer	11-14-2014 / 15:23'07
16	SKladded titles AUG	4	5000	i	complete	drankin	09-16-2014 / 13:20'21
17	JML WEEDING BSMT FIC(04-23-2014)(04-23-2014)	3351	5000	i	complete	kwoodside	09-16-2014 / 13:19'43
18		0	5000		empty		
19		0	5000		empty		
20	TCC reserves itype 93	68	250	i	complete	jmoreno	09-29-2014 / 14:33'25
21	TCC patrons to delete jhm aug18	92	5000	p	complete	jmoreno	08-18-2014 / 12:13'53
22	YPL large print noncirc since 2009 fbd 9/23/14	55	5000	i	complete	fdehler	09-23-2014 / 11:48'27
23	TCC nursing shelf list R's july 2014 jhm	988	5000	i	complete	jmoreno	07-15-2014 / 08:54'56
24	mgw titles mgw	312	5000	b	complete	cdamon	09-15-2014 / 13:21'39

Boolean Search ✕

Revie**w** File Name: --lau opl weeding

Store Record Type: ITEM i ▼

Index ▼   BARCODE (b) ▼   34473000000000 to 34473999999999

Term	Operator		Type	Field	Condition	Value A	Value B	
1			ITEM	CALL #	between	000	999	
2	AND		ITEM	CREATED	less than	06-30-2011	- -	
3	AND		ITEM	LCHKIN	less than	06-30-2011	- -	

ITEM CALL # between "000"and "999 "   AND ITEM CREATED less than "06-30-2011"   AND ITEM
 LCHKIN less than "06-30-2011"

Group

Ungroup

Insert Line

Append Line

Delete

Clear All

Search   **Use Existing Search**   **Retrieve Saved Query**   **Save**   **Save As**   **Close**

SEARCH RANGE FEATURE

Instead of searching the catalog…

- create a review file in create lists and browse through the list using the search range feature.
    - Peruse a list in a more browse-friendly way.
    - Make changes and move on quickly.
- Tools>Search>Range

File   Edit   View   Go   Tools   Admin   Reports   Window   Help

sierra

FUNCTION   Catalog

View   Edit   Summary   Print

Range ▼

Range
Review
Index
Advanced

Start   b10000008   Stop   b31219676   Start

\#
AUTHOR
TITLE
PUBLISHER

Summary   Record

File　Edit　View　Go　Tools　Admin　Reports　Window　Help

sierra

FUNCTION　Catalog

View　Edit　Summary　Print
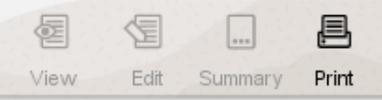
Index ▾ 　　　JOURNAL TITLE (s) ▾ 　　audubon　to　babytalk　　Start

CALL #
AUTHOR
TITLE
PUBLISHER

Summary

Record

File   Edit   View   Go   Tools   Admin   Reports   Window   Help

sierra

FUNCTION   Catalog

Save All   View   Edit   Summary   Export   Print

Index ▾   Current [   ] audubon   To babytalk   Previous   Next   Stop

b13112740

MAT TYPE b PERIODICAL

TITLE   Audubon [periodical].

LOCATIONS   apl , bfl , cml , jml , lpl , mca , nor , opl , pfl , rpl , sca , tcs , swh , uni , wlk , ysm , ypl , ysc

Summary	
Record	i60486545
Item-Level Holds	0
Bib-Level Holds	0

Summary

View i ITEM ▾   Attach New Item   Delete   Move   Select

✔	#	Record Number	LOCATION	BAR CODE	VOLUME
✔	1	i60486545	aplmc	30129102036168	v.114 no.6 Nov/Dec 2012
	2	i60762147	aplmc	30129102042141	v.115 no.1 Jan/Feb 2013
	3	i61133048	aplmc	30129102052660	v.115 no.2 Mar/Apr 2013
	4	i61712450	aplmc	30129102059707	v.115 no.3 May/Jun 2013
	5	i62004712	aplmc	30129102065464	v.115 no.4 Jul/Aug 2013
	6	i62342162	aplmc	30129102073963	v.115 no.5 Sep/Oct 2013
	7	i62721161	aplmc	30129102080513	v.115 no.6 Nov/Dec 2013
	8	i63101464	aplmc	30129102091445	v.116 no.1 Jan/Feb 2014
	9	i63269259	aplmc	30129102096618	v.116 no.2 Mar/Apr 2014
	10	i63570518	aplmc	30129102103893	v.116 no.3 May/Jun 2014
	11	i65494039	aplmc	30129102111151	v.116 no.4 Jul/Aug 2014
	12	i6591899x	aplmc	30129102122331	v.116 no.5 Sep/Oct 2014
	13	i6734219x	aplmc	30129102127520	v.116 no.6 Nov/Dec 2014
	14	i59446808	bflma	34915001837078	Vol. 114, # 3, 05-06/2012
	15	i59777679	bflma	34915001844306	Vol. 114, # 4, 07-08/2012
	16	i60174730	bflma	34915001854610	Vol. 114, # 5, 09-10/2012
	17	i60477428	bflma	34915001859593	Vol. 114, # 6, 11-12/2012
	18	i60751940	bflma	34915001863348	Vol. 115, # 1, 01-02/2013

View-Only Mode

HIGH DEMAND HOLDS

Creates a report which identifies titles that have a large number of holds.

- Found in Function Menu
- View system holds or local holds
- Browse within Sierra Desktop App
- Ability to export lists
  - Manage your acquisitions using HDH
  - Create a most popular list for your patrons

File   Edit   View   Go   Tools   Admin   Reports   Help

sierra

FUNCTION   High-Demand Holds

View Bib   Export   Print   Close

View Report For:

○ System-Wide Thresholds

◉ Selected Pickup Location

Orono Public Library

Create Report

#	Title	Author	Material Type	System Holds	System Items	Local Holds	Local Items
1	The blood of Olympus / Rick Riordan.	Riordan, Rick, aut...	PRINTED MTL	74	46	3	1
2	The book with no pictures / B.J. Novak.	Novak, B. J., 1979-...	PRINTED MTL	18	16	3	0
3	The burning room : a novel / Michael Connelly.	Connelly, Michael, ...	PRINTED MTL	128	35	4	1
4	Crooked letter, crooked letter / Tom Franklin.	Franklin, Tom.	PRINTED MTL	4	27	4	1
5	Edge of eternity / Ken Follett.	Follett, Ken, author.	PRINTED MTL	109	55	5	1
6	Gray Mountain / John Grisham.	Grisham, John, au...	PRINTED MTL	227	53	2	1
7	Gray Mountain / John Grisham.	Grisham, John, au...	LARGE PRINT	56	11	3	0
8	Haven. The complete fourth season / Haven 4 Productions.		DVD	12	2	2	0
9	Homeland. The complete third season.		DVD	121	17	2	0
10	The innovators : how a group of inventors, hackers, geniuses, and geeks created the digital revolutio...	Isaacson, Walter, ...	PRINTED MTL	16	27	2	0
11	The job : a Fox and O'Hare novel / Janet Evanovich and Lee Goldberg.	Evanovich, Janet.	PRINTED MTL	58	12	2	1
12	Leaving time : a novel / Jodi Picoult.	Picoult, Jodi, 1966...	PRINTED MTL	222	55	2	1

Report for Orono Public Library

File   Edit   View   Go   Tools   Admin   Reports   Help

sierra

FUNCTION   High-Demand Holds ▼

View Bib   Export   Print   Close

View Report For:

● System-Wide Thresholds

○ Selected Pickup Location

Orono Public Library ▼

Create Report

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#	Title	Author	Material Type	System Holds ▼	System Items
73	Earth to echo / Relativity Media presents a Panay Films production ; directed by Dave Green ; screenplay by Henry Gayden ; ...		DVD	16	7
74	OBSESSION IN DEATH/ J.D. Robb.	Robb, J. D., 1950-, auth...	PRINTED MTL	16	3
75	Pay any price : greed, power, and endless war / James Risen.	Risen, James, author.	PRINTED MTL	16	7
76	PIONEER GIRL : THE ANNOTATED AUTOBIOGRAPHY	Wilder, Laura Ingalls.	PRINTED MTL	16	1
77	Revival / Stephen King.	King, Stephen, 1947-, a...	SPOKEN CD	16	3
78	They came together / Lionsgate presents ; a Lionsgate/Showalter-Wain production ; a David Wain movie ; produced by Mic...		DVD	16	8
79	Captain America, the winter soldier / writers, Christopher Markus & Stephen McFeely ; directors, Anthony Russo, Joe Russ...		BLU RAY	15	1
80	HUSH / Karen Robards.	Robards, Karen.	PRINTED MTL	15	7
81	41 : a portrait of my father / by George W. Bush.	Bush, George W. (George Walker), 1946- author.		14	5
82	The big bang theory. The complete seventh season / Warner Bros. Television ; Chuck Lorre Productions ; executive produc...		DVD	14	7
83	Mad men. The final season, part 1 / directed by Phil Abraham .. and others ; written by Matthew Weiner ; produced by Matth...		DVD	14	6
84	Need for speed / Dreamworks Pictures and Reliance Entertainment ; produced by John Gatins, Patrick O'Brien, Mark Sour...		DVD	14	5

System-wide report

File   Edit   View   Go   Tools   Admin   Reports   Window   Help

sierra

FUNCTION   High-Demand Holds

View Bib   Export   Print   Close

View Report For:

(•) System-Wide Thresholds

( ) Selected Pickup Location

Orono Public Library

Create Report

· · · · · · · · ·

#	Title	Author	Material Type	System Holds ▼	System Items
128	The wind rises		DVD	10	2
129	ASSASSIN	Cussler, Clive, author.	PRINTED MTL	9	3
130	COLD BETRAYAL : an Ali Reynolds novel / J.A. Jance.	Jance, Judith A., author.	PRINTED MTL	9	3
131	CRASH & BURN / Lisa Gardner.	Gardner, Lisa, author.	PRINTED MTL	9	2
132	DEADLY ASSETS	Griffin, W.E.B.	PRINTED MTL	9	4
133	The end of always : a novel / Randi Davenport.	Davenport, Randi, 195...	PRINTED MTL	9	4
134	The fault in our stars / Fox 2000 Pictures presents a Temple Hill production ; produced by Wyck Godfrey, Marty Bowen ; scr...		DVD/BLU RAY COMBO	9	2
135	Godzilla / Warner Bros. Pictures and Legendary Pictures present a Legendary Pictures production ; produced by Thomas ...		DVD	9	3
136	HOPE TO DIE / James Patterson.	Patterson, James, 194...	LARGE PRINT	9	1
137	Houdini / directed by Uli Edel ; writte[n] [Copy] [View bib] eyer ; produced by Gerald W. Abrams, Andras Hamori.		DVD	9	3
138	Jersey boys / Warner Bros. Pictures [Export] Films production ; a Malpaso production ; screenplay and musical boo...		DVD/BLU RAY COMBO	9	1
139	The last anniversary : a novel / Liane [Print]	Moriarty, Liane.	PRINTED MTL	9	3

Copy

View bib

Export

Print

System-wide report

REINSTATE FINE

A fine can be reinstated in all instances, except:

- Any Manual charge added as a fine
- Adjustment charges for billed rental items
- Any library notice printing charges
- Any charge with a payment status of Adjustment

- When in a patron account, review the Fines Paid history in the Fines Tab.

- View the Fine and select the Reinstate Fine button.

File Edit View Go Tools Admin Reports Window Help

sierra

FUNCTION Check Out (Circulation Desk) ▼

Browse | Key or Scan Item or Patron Barcode | Search

New   View   Edit   Print   Close

P TYPE   1 kbk adult
PATRON NAME   mintest62 patron
P BARCODE   21907999999999
PCODE4   1 kbk Kennebunk Resident
EXP DATE   12-31-2015

Paid Fine Detail   ✕

Payments Made By mintest62 patron

Detail   **Balance**

Invoice: 490936   Item Charge: $0.00
Charge Type: Adjustment   Processing Fee: $0.00
Call Number: EST EREADER Kennebunk Adult E-Reader   Billing Fee: $2.70
Author:
Barcode: Total: $2.70
Title: Barnes

Reinstate Fine   ✕

? This fine will be reinstated. Original
   fine payment information will be
   removed.

   Confirm   Cancel

Charge Location: kbker   Paid: -$0.00
Statistics Group: 0   aid: -$0.00
Checkout Date: 08-20-20   =========
Due Date: 09-10-20   ue: $2.70
Assessed Date: 09-30-20
Date Paid: 10-01-2014
Payment Status: Waive
Login: luhlman

Reinstate Fine   Print   Close

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

Fines

Add Charge   Fines Paid   Patron Notes

Total: $0.00 Amount selected: $0.00

All   Status   Location   Amount

MERGE DUPLICATE PATRONS

If you have an instance where two patron accounts are for the same individual, merge them together using **Merge Duplicate Patrons**, which can be found in the **Functions** menu.

- Find two identical (similar) patrons and note their patron record #s

- The primary account will have the secondary accounts information added to it and the secondary will be deleted.

- All notes, fines, holds, etc. will be moved over to the primary account.

    - Write down the primary account's patron record number – this will be your **Destination Record**.

    - Write down the secondary account's patron record number – this will be your **Source Record**.

View Patron Record · p2062962x

File Edit View

Insert Print Close

p2062962x Last Updated: 11-15-2014 Created: 11-15-2014 Revisions: 2

EXP DATE	01-01-2015	BIRTH DATE	- -	CUR ITEMB	0
PCODE1	I ADULT	HOME LIBR	opl Orono Public Library	OD PENALTY	0
PCODE2		PMESSAGE		ILL REQUES	0
PCODE3	255 Unassigned	MBLOCK	- NO BLOCK	CUR ITEMC	0
P TYPE	250 opl courtesy	CL RTRND	0	CUR ITEMD	0
TOT CHKOUT	0	MONEY OWED	$0.00	PCODE4	2077 opl Bangor resident
TOT RENWAL	0	BLK UNTIL	- -	CIRCACTIVE	- -
CUR CHKOUT	0	CUR ITEMA	0	Notice Preference	- NONE

n	Wilde, Oscar
a	321 Dublin St.
	Orono, ME 04473
t	581-3088
z	oscar.wilde@nosuchplace.com
b	24473999999999
m	This is a training account for test purposes

View-Only Mode

View Patron Record · p20566189

File Edit View

Insert Print Close

p20566189 Last Updated: 11-15-2014 Created: 09-25-2014 Revisions: 16

EXP DATE	01-01-2015	BIRTH DATE	- -	CUR ITEMB	0
PCODE1	I ADULT	HOME LIBR	opl Orono Public Library	OD PENALTY	0
PCODE2		PMESSAGE		ILL REQUES	0
PCODE3	255 Unassigned	MBLOCK	- NO BLOCK	CUR ITEMC	0
P TYPE	250 opl courtesy	CL RTRND	0	CUR ITEMD	0
TOT CHKOUT	4	MONEY OWED	$0.20	PCODE4	255 Unassigned
TOT RENWAL	0	BLK UNTIL	- -	CIRCACTIVE	10-24-2014
CUR CHKOUT	0	CUR ITEMA	0	Notice Preference	z EMAIL

n	Wilde, Oscar
a	321 Dublin St.
	Orono, ME 04473
t	(207)581-3088
z	oscar.wilde@nosuchplace.com
b	24473999999998
m	This is a test account for training purposes.

View-Only Mode

LINKING PATRONS

- Link patron accounts for:
  - Families
  - Classrooms
  - Book groups
  - Business accounts

- Allows you to quickly jump between accounts

- Makes paying fines for multiple accounts easier
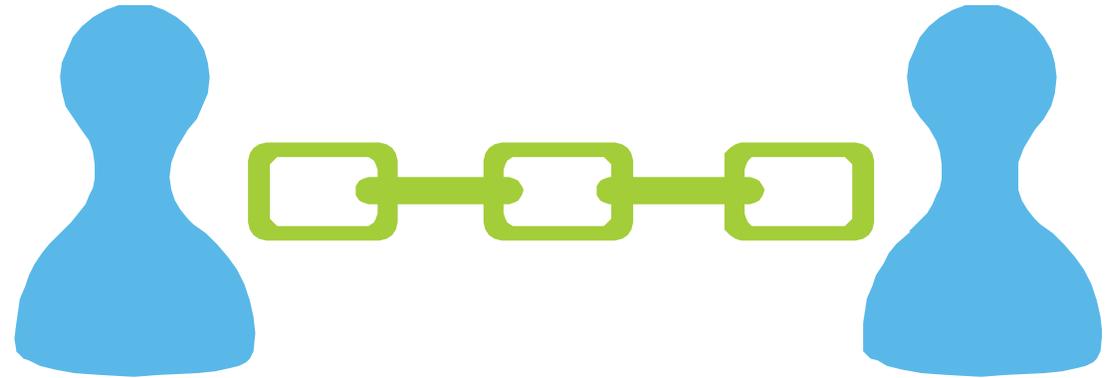
File   Edit   View   Go   Tools   Admin   Reports   Window   Help

sierra

FUNCTION   Check Out (Circulation Desk)

Browse | Key or Scan Item or Patron Barcode | Search

New   View   Edit   Print   Close

P TYPE   **250 opl courtesy**
PATRON NAME   **Austen, Jane**
ADDRESS   **1775 Hampshire Road**
                Orono, Maine 04473
P BARCODE   ~~24473900000075~~

Check Out	0
Checked-Out Items	0
Holds	0
Fines	$0.00
Check In	0
Linked Patrons	2
Bookings	0
ILL	0
INN-Reach	0

Linked Patrons

Link   Unlink   Go To Patron

All	PATRN NAME	ADDRESS
☐	Wilde, Oscar	321 Dublin St.$Orono, ME 04473
☐	Austen, Jane	1775 Hampshire Road$Orono, Maine 04473

File   Tools

b BARCODE ▼ | 24473999999999 | **Search**
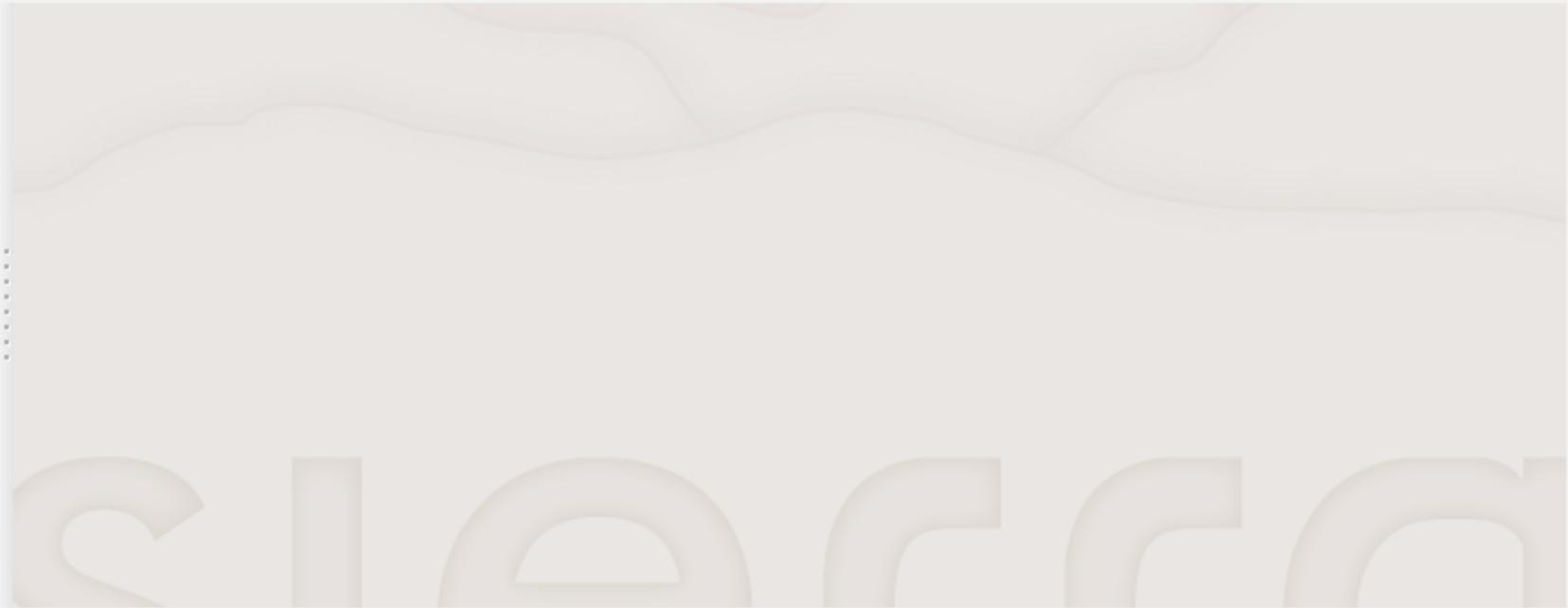
Print   Close

New PATRON

   TEACHER

   PATRON NAME

   COLL/AFFIL

   P BARCODE

1 BARCODE, 1 ENTRIES

EMAILING A RECEIPT

- Want to save paper?

- Tired of changing out rolls or reams of paper?

- Want to cut office/equipment costs?

Change your receipt printer settings to email

- Patrons will receive their receipts in their email

  - i.e. payments, checked out slips, holds list, etc.

- Patrons who want a printout can easily have one without you going back and forth to the printer settings each time a patron comes to the desk.

File Edit View Go Tools Admin Reports Window Help

Recent Patrons ▶
New Patron

Next Record   Ctrl-Close Bracket
Previous Record   Ctrl-Open Bracket   **Search**

Print Table (Receipt Printer) Ctrl-P
Select Printer ▶   Standard Printer
Close   Alt-Q   Receipt Printer
     Label Printer
Exit   Form Printer
     Print Templates

FUNCTION Check Out (Circulation Desk)

New   View   Edit   Print   Close

Orono, Maine 04

P BARCODE   24473999999975

Check Out	0	
Checked-Out Items	0	
Holds	0	
Fines	$0.00	
Check In	0	
Linked Patrons	2	
Bookings	0	
ILL	0	
INN-Reach	0	

Linked Patrons

Link   Unlink   Go To Patron

All	PATRN NAME	
☐	Austen, Jane	e Road$Orono, Maine 04473
☐	Millay, Edna St. Vincent	oad$Orono, ME 04473

Select Receipt Printer ✕

?   **Current Printer:**   Local Printer

Select Receipt Printer

(none)
Local Printer
EMMC Network System Printer
FTS file save
E-mail Printer
Email to Patron

OK   Cancel

FTS MAIL Inbox x

minerva.noreply@maineinfonet.org 2:46 PM (3 minutes ago)

to me

Summary of Paid Fines
Patron: Wilde, Oscar

Invoice Charge Type   Description Amount Due Amount Paid Date Paid
494516 Manual Charge printing $0.20 $0.00   11-15-2014

minerva.noreply@maineinfonet.org 2:48 PM (1 minute ago)

to me

Holds summary for Wilde, Oscar
Sat Nov 15 14:48:01 EST 2014

Barcode Call Num Location Title Pickup At Not After Status

1 COPY RTD SOONEST No Call Num   All the light we cannot Orono Public Library
see / Anthony Doerr.