



MID-HUDSON LIBRARY SYSTEM

Sierra Users Group

Fall

MHLS TechOps Team:

Laurie Shedrick, Thomas O'Connell, Nina Acosta,
Tara Stohr, Kerri Carpenter, Gerry Formby, Isaac Barbee, Joris
Lemmens



Agenda

- ▶ Welcome!
- ▶ Sierra / Encore release information
- ▶ The ILS “Road Map”
 - ▶ Recap
 - ▶ What’s ahead
 - ▶ Vega
- ▶ Open forum - What’s on your mind?



Sierra Users Group

Who are we?

We are a group of people who...

- ▶ Use Sierra! ... Within the Mid-Hudson Library System
- ▶ Who want to share ideas
- ▶ Who are curious or want to learn new skills and tricks
- ▶ Who want to improve the services to our patrons
- ▶ Who want to improve the processes that we have in place
- ▶ Who want to move the Sierra and Encore platform forward

Library Staff * Directors * IT * MHLS Staff



Sierra Users Group

What are we?

We are a group of people who agree to choose to come together to

- ▶ Stay informed and up to date with the ILS and related products
- ▶ Learn about current and future releases
- ▶ Learn about “Road Map” releases and new functions
- ▶ Discuss current issues with the ILS and related products
- ▶ Form enhancement and service requests



- Contract from 9/1/2019 - 8/31/2024
- Subscription - Software as a service
- Success Bundle + additions
- Basecamp & Implementations to be completed by 12/31/2020
- Development partners for Inspire Vega

SIERRA RELEASE 5.1-5.2

- ▶ **Current Version: 5.1**

- ▶ Upgraded July 2020

- ▶ **Features:**

- ▶ Email Due Date receipt
 - ▶ Create Lists Edit feature
 - ▶ Restore Deleted records
 - ▶ Open multiple windows
 - ▶ (Loan Rules/Determiner table)

SIERRA RELEASE 5.2

- ▶ **Current Version: 5.1**

- ▶ Upgraded July 2020

- ▶ **Features:**

- ▶ Email Due Date receipt
- ▶ Create Lists Edit feature
- ▶ Restore Deleted records
- ▶ Open multiple windows
 - ▶ (Loan Rules/Determiner table)

- ▶ **Next Version: 5.2**

- ▶ Released September 2020

- ▶ **Features:**

- ▶ Create Lists 'Not' operator
- ▶ Display library name on Emails
- ▶ "Remember me" does not save passwords
- ▶ Improved accessibility in My Account (Encore 5.2)

SIERRA RELEASE 5.2

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ILS Road Map

A collaborative path forward

road·map

/'rōdmap/ 

- A plan or strategy intended to achieve a particular goal



We are in the second leg of our journey.
Road Map 2.0 has Begun!

Completed



Sierra Road Map

- Text Message Notices
- Mobile Worklist
- Decision Center
- Telephone Notification System

Serials

When: Q4 2020
Who: Library Staff & Patrons
Where: System wide
Training: Oct 30th
[More Information](#)

Inter Library Loan

When: Q4 2020
Who: Library staff/MHLS/patrons
Where: System wide
Training: TBD
[More Information](#)

Materials Booking

When -Q1 2021
Who – Library staff/patrons
Where: web based/ authorized users
Training:TBD
[More Information](#)

Patron Images

When -Q1-Q2 2021
Who – Library Staff/patrons
Where:Circulation
Training: TBD
[More Information](#)

Encore Harvesting

When TBD 2021
Who – Library administrators /Patrons
Where: Encore
Training: TBD
[More Information](#)




Text Messages


KNOWLEDGE BASE > TEXT MESSAGES

Description: Patrons can opt into receiving a text message in addition to their Hold Pickup, Overdue and Courtesy Notices (Auto Renewal). They can add this option from their Patron record in our public catalog. They can just as easily opt out.

Impact: Text messages are more visible on cell phones. Patrons are more likely to see the notice and take the necessary actions. This should improve notice time.

 **Go Live Date:** Live as of 10/1/2019

 **Pilot access - now over**

 **Library Readiness:** This will be enabled System wide by MHLS on the designated date. Staff should read [Documentation and talking points](#).

 [Staff Documentation | FAQ](#)

 [Talking points](#)

Looking Back...
Other stuff

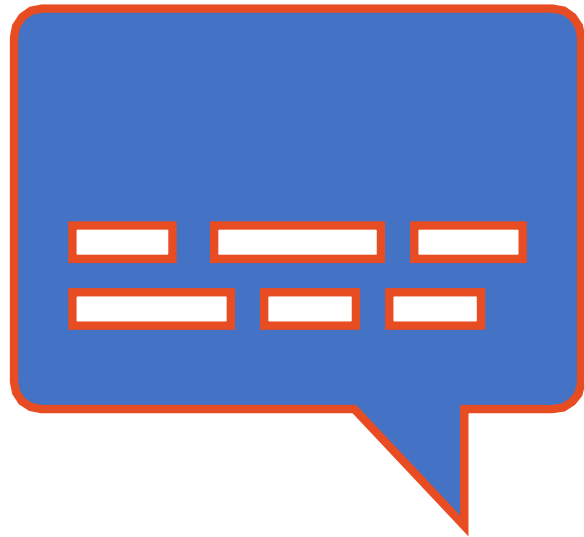
SkyRiver

Training for MHLS

Sip2

Legacy APIs

Itiva telephone notification

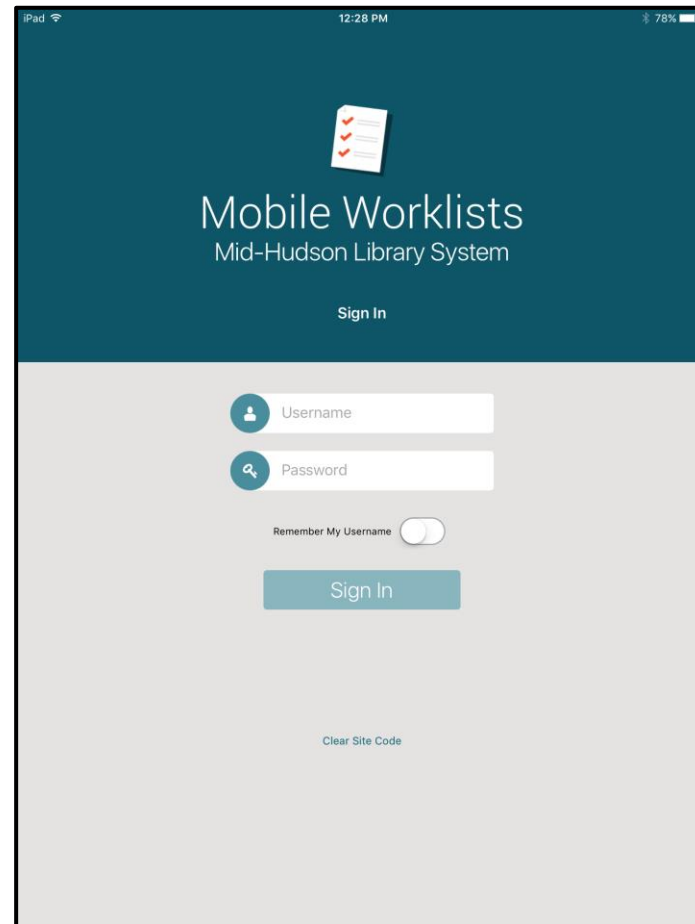


Looking Back... Text Messages

- ▶ Introduced October of 2019
- ▶ Courtesy Notices
- ▶ Hold Pickup Notices
- ▶ Hourly Overdue
- ▶ Overdue

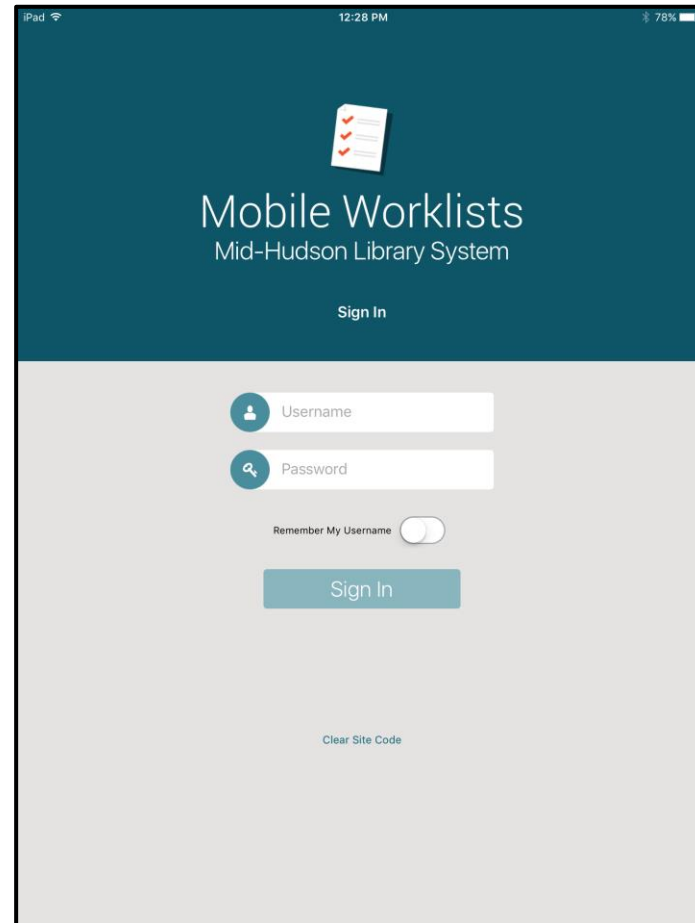
Mobile Worklists

- ▶ **Introduced: January 2020**
- ▶ Log in with your Sierra Login
 - ▶ (does not use a license)
- ▶ Available for IOS



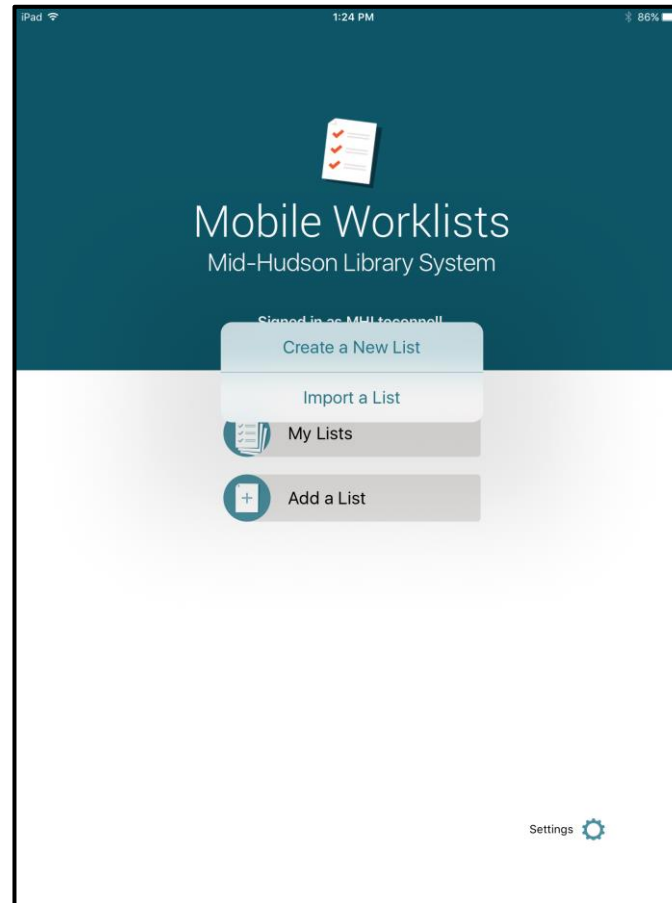
Mobile Worklists

- ▶ **Mobile Work lists allows the user to do the following:**
 - ▶ Create a list of records in the app
 - ▶ Keep track of lists in My Lists
 - ▶ Scan barcodes with the camera on their mobile device using integrated barcode scanning from Send a list of items to Sierra
 - ▶ In Sierra, turn a list into a review file. Users can then update records in Sierra using Global or Rapid Update

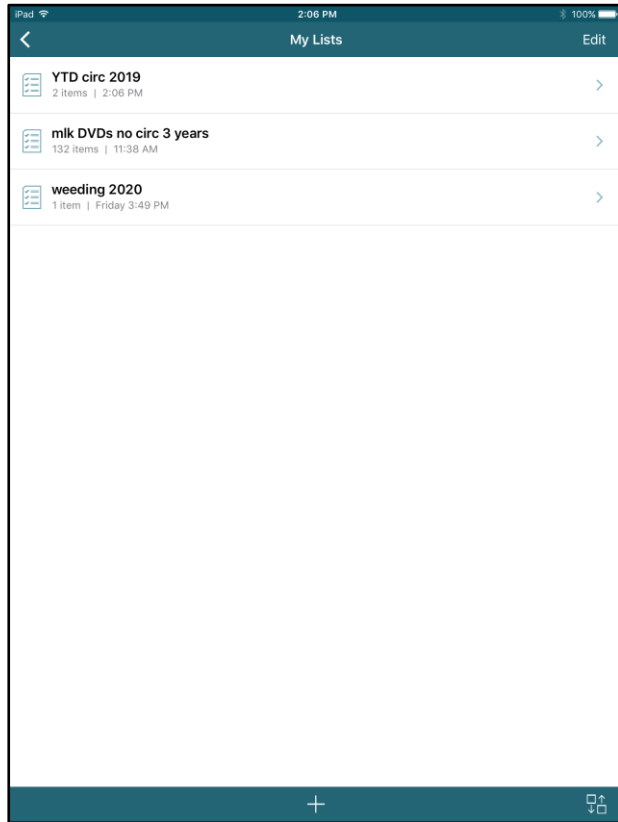


Mobile Worklists

- ▶ The **My Lists** screen lists all the worklists you have created in Mobile Worklists or imported from Sierra.
- ▶ **Add a list** allows you to
 - ▶ *Create a New List*
 - ▶ *Import a list*

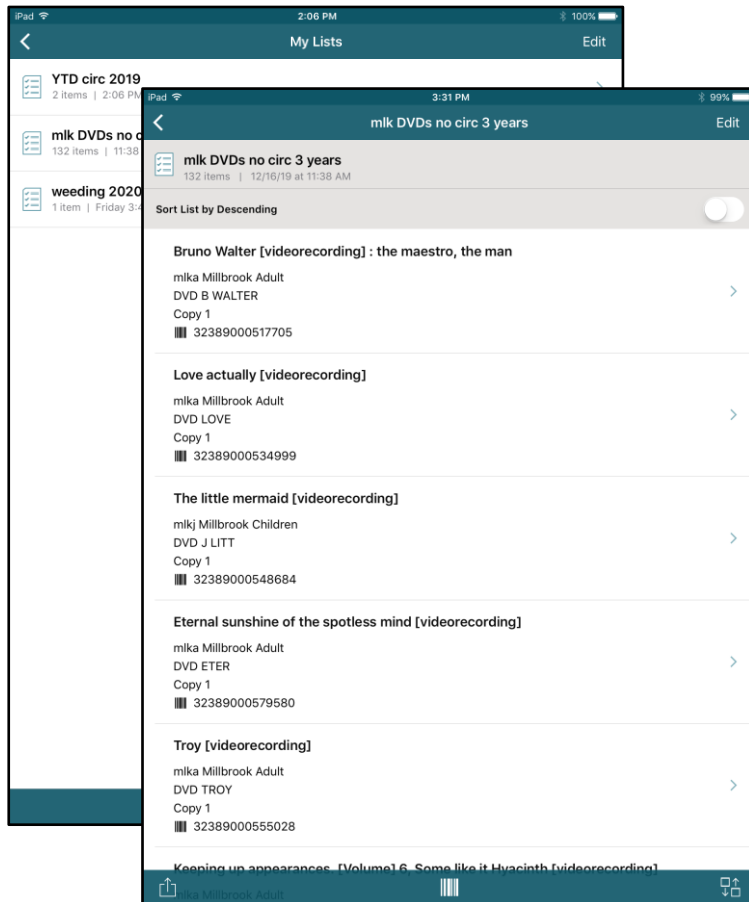


Mobile Worklists



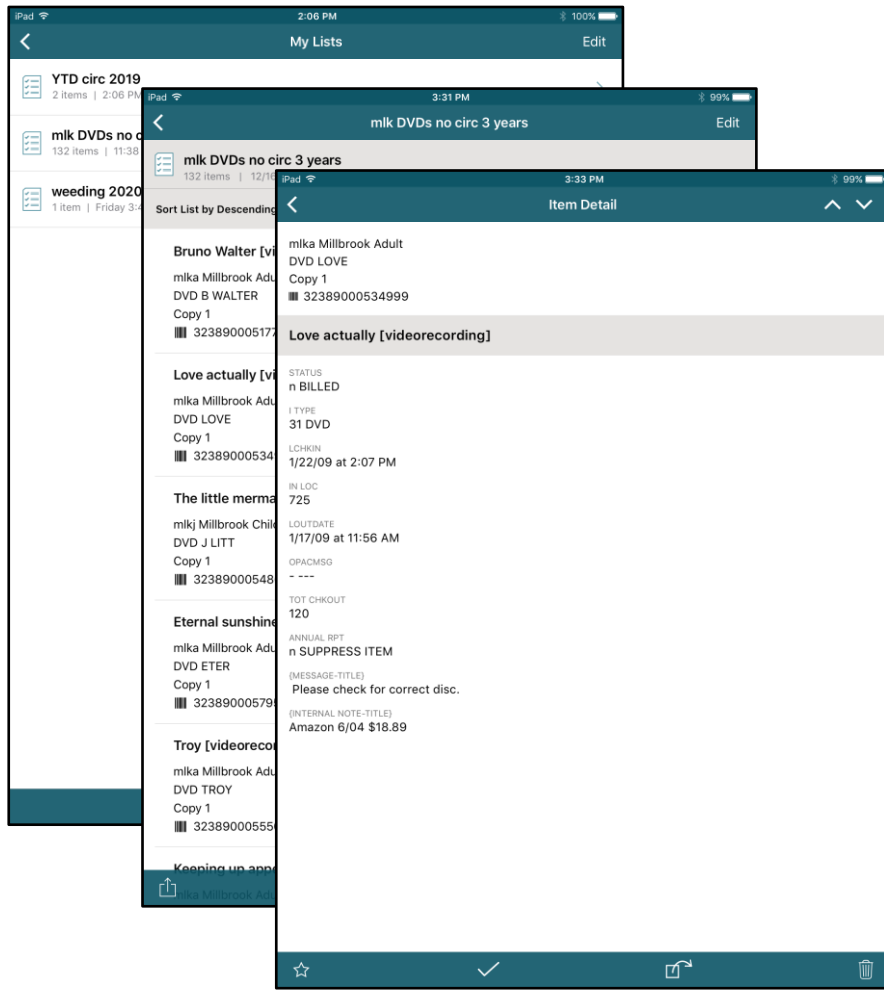
- ▶ Keep track of your lists-

Mobile Worklists



- ▶ Keep track of your lists-
- ▶ The records in your lists

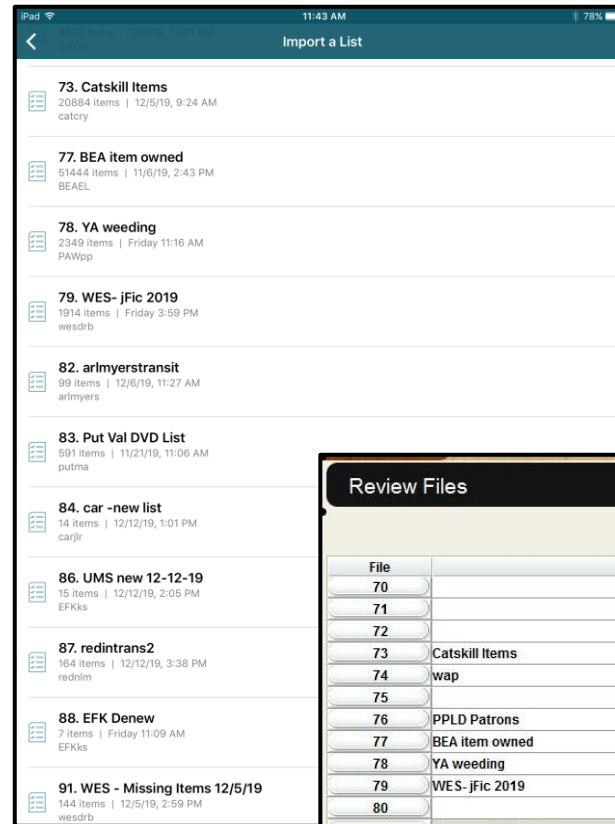
Mobile Worklists



- ▶ Keep track of your lists-
- ▶ The records in your lists
- ▶ And the Item/Bib information about the records in your lists

Mobile Worklists

- ▶ Import a Review File from Create Lists

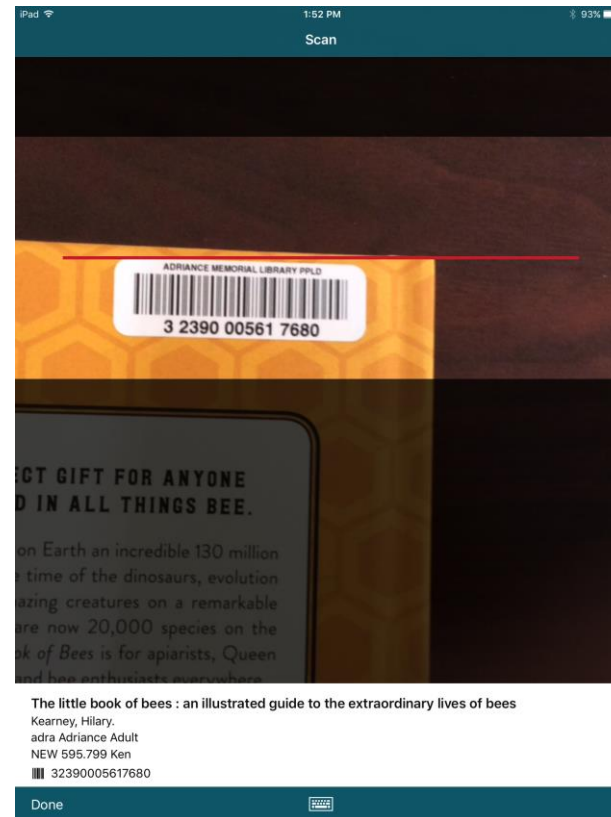


The screenshot shows a desktop web interface titled "Review Files". It features a search bar set to "All" and several action buttons: "Search Records", "Sort Records", "List Records", "Import Records", and "Export Records". Below these is a table with the following data:

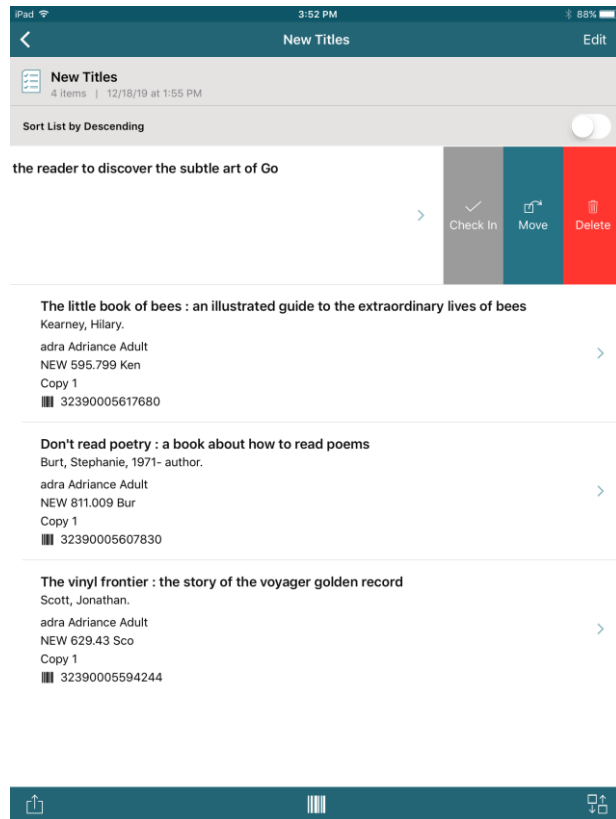
File	Name	Current Records	Max Records	Type
70		0	40000	
71		0	40000	
72		0	40000	
73	Catskill Items	20884	60000	i
74	wap	1126	60000	p
75		0	60000	
76	PPLD Patrons	33178	60000	p
77	BEA item owned	51444	60000	i
78	YA weeding	2349	60000	i
79	WES- jFic 2019	1914	60000	i
80		0	200000	
81	Thomas' test patrons	4	5000	p
82	arlmyertransit	99	5000	i
83	Put Val DVD List	591	5000	i
84	car -new list	14	5000	i

Mobile Worklists

- ▶ Build a list in the stacks using your device's camera

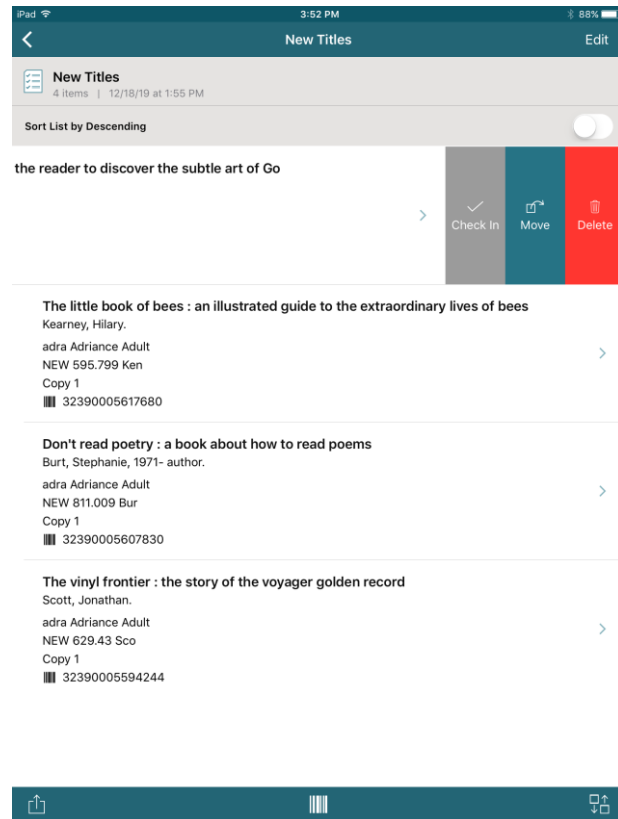


Mobile Worklists

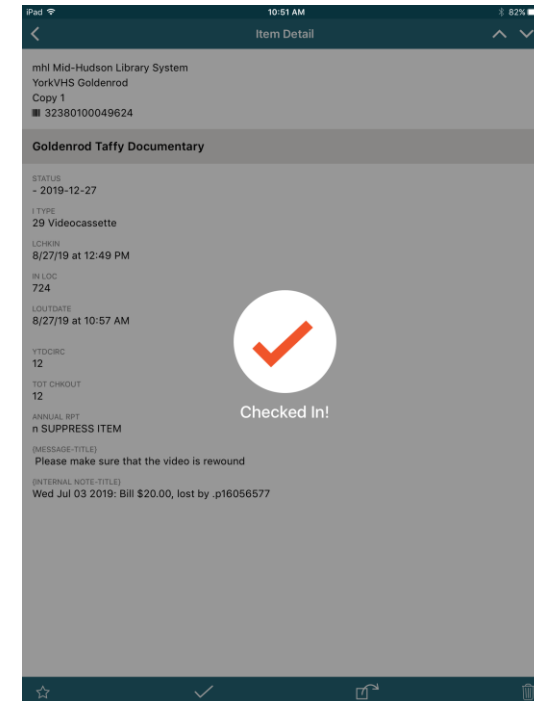


- ▶ Delete records
- ▶ Move records to other lists
- ▶ Check in items

Mobile Worklists

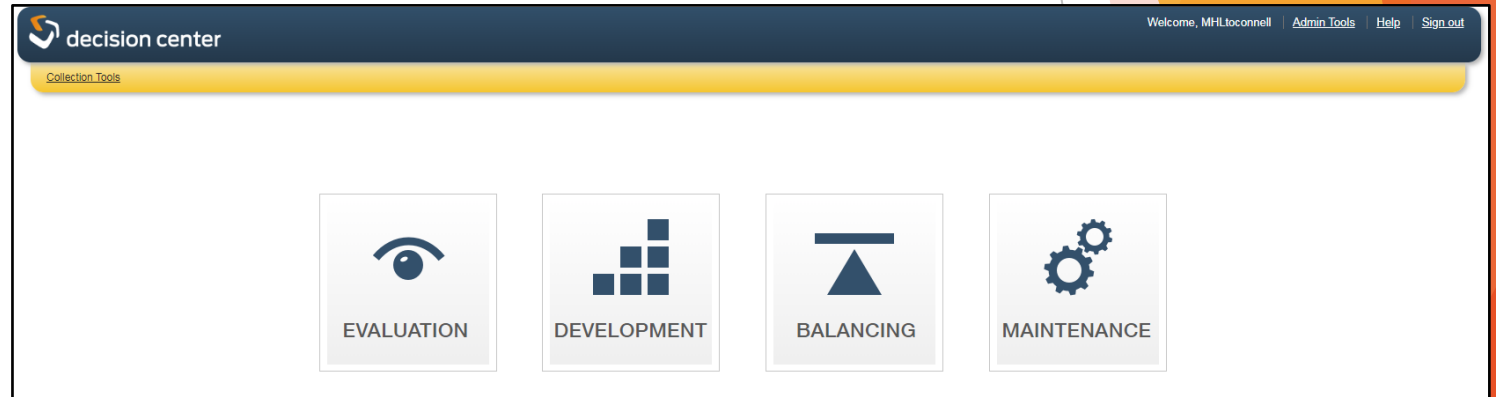


- ▶ Delete records
- ▶ Move records to other lists
- ▶ Check in items



Decision Center

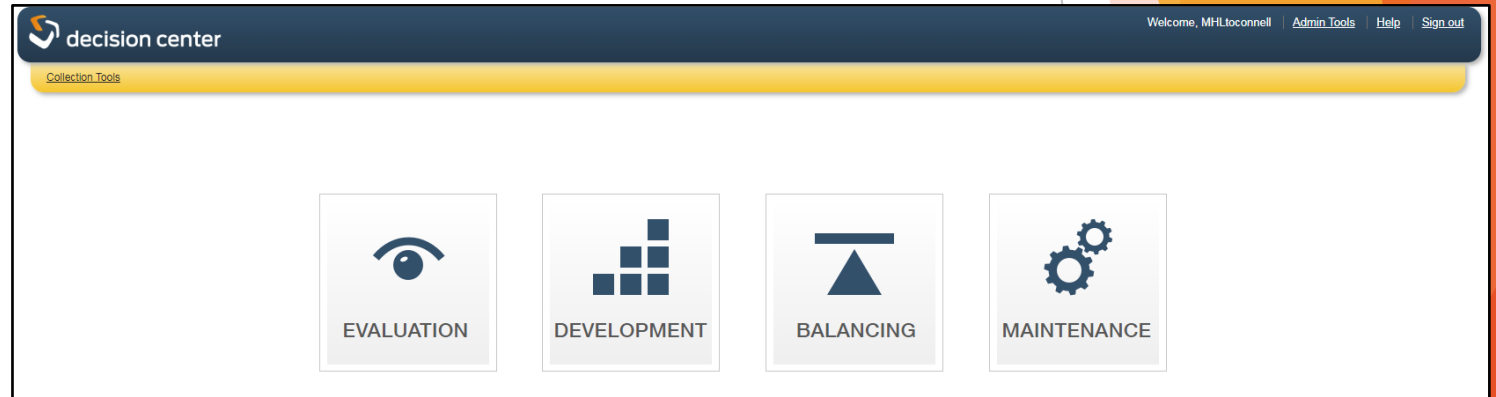
- ▶ **Introduced: April 2020**
- ▶ <https://dc-mhud.iii.com/>
- ▶ Log in with your Sierra Login
 - ▶ (does not use a license)



Decision Center

- ▶ **Decision Center** is a package of reports that aid library staff with analysis of the collection, and usage of the collection, using record and transaction data.

- ▶ *Over 150 reports...*

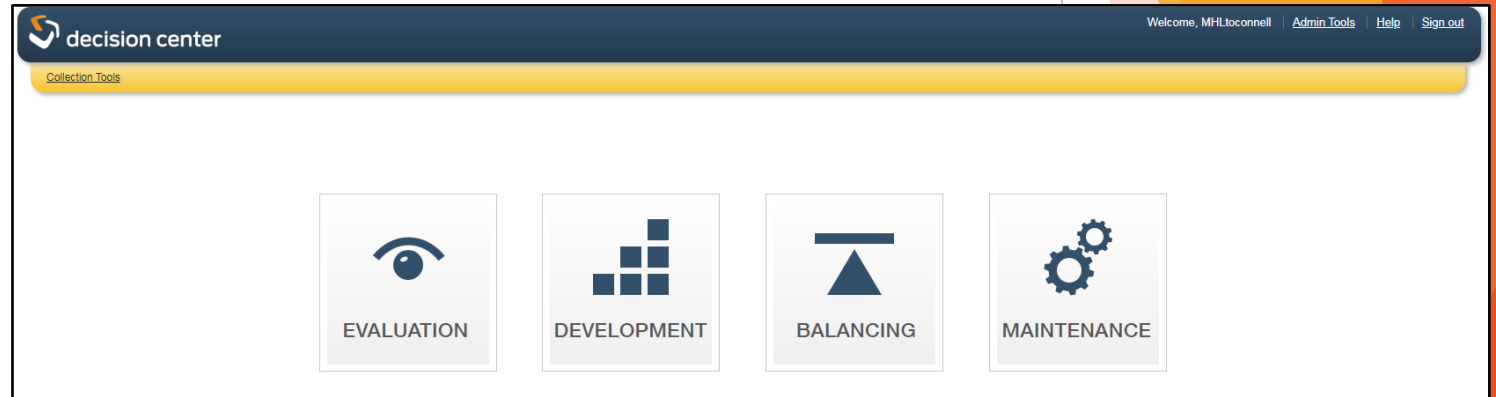


Decision Center

- ▶ **Creating and running a report**

- ▶ Evaluation
- ▶ Development
- ▶ Balancing
- ▶ Maintenance

- ▶ *Over 150 reports...*



Decision Center

The screenshot displays a 'Decision Center' interface with several filter configuration panels. Each panel has a dark blue header with a circular icon and a title. Below the header is a light gray area with a link to view all items for that filter.

- LOCATION**: All Locations [edit](#)
- COLLECTION**: All Collections [edit](#)
- SHELF LOCATION**: All Shelf Locations [edit](#)
- CALL NUMBER RANGE**: All Call Number Ranges [edit](#)
- PHYSICAL FORMAT**: All Physical Formats [edit](#)
- LIMITS**:
 - Circs Fewer Than:
 - Within (months):
- RECORD CREATION DATE**:
 - Record Created After:
 - Record Created Before:

A small orange 'GO' button is located at the bottom left of the interface.

- ▶ **Creating and running a report**
- ▶ **Configure the initial filters. The available filters appear on the reference page for each report.**

Decision Center

decision center
Welcome, MHLtoconnell [Admin Tools](#) | [Help](#) | [Sign out](#)

Collection Tools > Maintenance > Low Circulation Weeding 1 Initial Filters 2 Output and additional filtering

LOCATION Millbrook · SHELF LOCATION All Shelf Locations · PHYSICAL FORMAT All Physical Formats · RECORD CREATED AFTER 1/1/17 · RECORD CREATED BEFORE 2/7/20 · COLLECTION All Collections · CALL NUMBER RANGE All Call Number Ranges · CIRCS FEWER THAN 1 · WITHIN (MONTHS) 12

Last Checkin Date Before

List Price Less Than

Don't Weed Last Copy In Branch

Don't Weed Last Copy In System

Number

Shelf Space

Showing 1 to 500 of 2952 entries [EMAIL / SCHEDULE](#) [EXPORT](#)

#	<input checked="" type="checkbox"/>	Item Location	Shelf Location	Call Number	Barcode	Title	Author	Total Circs	Circs Last 12 Months	Copies in Branch	Copies in System	Last Checkin Date	Created Date	Item Price	Item Status
1	<input checked="" type="checkbox"/>	Millbrook	Millbrook Adult	F BASH (Spanish)	32389001007649	Chicos de nieve y cristal	Bashardoust, Melissa	0	0	1	1		4/24/19	30	CHECKED IN
2	<input checked="" type="checkbox"/>	Millbrook	Millbrook Adult	641.8 FERN (Spanish)	32389000989326	Tapas minicoocina & diseño	Fernandez, Carmen	0	0	1	1		5/17/18	23	CHECKED IN
3	<input checked="" type="checkbox"/>	Millbrook	Millbrook Adult		32389001002434	WebMD the magazine : [*for linking items and placing holds]		0	0	12	255		1/3/19	5	CHECKED IN
4	<input checked="" type="checkbox"/>	Millbrook	Millbrook Adult	892.1 KOVA	32389001013456	The epic of Gilgamesh		0	0	1	3		5/16/19	16	CHECKED IN
5	<input checked="" type="checkbox"/>	Millbrook	Millbrook Adult	759.9492 SUTT	32389001001584	Masters of 17th-century Dutch landscape painting	Sutton, Peter C.	0	0	1	1		12/4/18	60	CHECKED IN
6	<input checked="" type="checkbox"/>	Millbrook	Millbrook Adult	814 APPE	32389000987561	Phoning home : essays	Appel, Jacob M., 1973-	0	0	1	5		4/14/18	23	CHECKED IN
7	<input checked="" type="checkbox"/>	Millbrook	Millbrook Adult		32389001001808	Architect : [*for linking items and placing holds]		0	0	11	11		12/28/18	5	CHECKED IN
8	<input checked="" type="checkbox"/>	Millbrook	Millbrook Adult		32389001020162	Country life : [*for linking items and placing holds]		0	0	12	12		11/27/19	5	CHECKED IN
9	<input checked="" type="checkbox"/>	Millbrook	Millbrook Adult		32389000974526	Smithsonian : [*for linking items and placing holds]		0	0	11	480		8/28/17	5	CHECKED IN
10	<input checked="" type="checkbox"/>	Millbrook	Millbrook Adult		32389001023208	Vanity fair : [*for linking items and placing holds]		0	0	14	303		2/3/20	5	CHECKED IN
11	<input checked="" type="checkbox"/>	Millbrook	Millbrook Young Adult	YA-Graphic NORT vol 3	32389001004513	The unbeatable Squirrel Girl, Vol. 3	North, Ryan, 1980-	0	0	1	1		3/7/19	23	CHECKED IN
12	<input checked="" type="checkbox"/>	Millbrook	Millbrook Children	J 954.95 NGCH	32389001021889	Maldives	NgCheong-Lum, Roseline, 1982-	0	0	1	2		1/15/20	50	CHECKED IN
13	<input checked="" type="checkbox"/>	Millbrook	Millbrook Adult	817.54 LOZA (Spanish)	32389001017952	Los mejores chistes verdes	Lozano, Jocundo.	0	0	1	1		2/5/19	10	CHECKED IN
14	<input checked="" type="checkbox"/>	Millbrook	Millbrook Young Adult	YA-Graphic SHIN	32389001008332	Your name, 3	Shinkai, Makoto.	0	0	1	4		3/30/19	11	CHECKED IN
15	<input checked="" type="checkbox"/>	Millbrook	Millbrook Adult		32389001016939	Living Millbrook : An exclusive magazine for the Millbrook Community : [*for linking items and placing holds]		0	0	12	12		9/30/19	5	CHECKED IN
16	<input checked="" type="checkbox"/>	Millbrook	Millbrook Adult	613.25 MACH (Spanish)	32389000985746	Irresistible y sana : mis mejores remedios, jugos verdes y planes para revitalizarte y no engordar jamás	Macher, Ingrid, 1973-	0	0	1	1		5/16/18	15	CHECKED IN

Decision Center





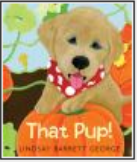
Welcome, MHLtoconnell | [Admin Tools](#) | [Help](#) | [Sign out](#)

[Collection Tools](#) > [Evaluation](#) > Popular Titles

1 [Initial Filters](#) 2 [Output and additional filtering](#)

DATE 04/02/2019 - 04/01/2020 • LOCATION Millbrook • TRANSACTION Checkouts • TRANSACTION LOCATION All Transaction Locations • PATRON TYPE All Patron Types • ITEM TYPE Book • CALL NUMBER RANGE All Call Number Ranges • SHELF LOCATION Millbrook Children

[EMAIL / SCHEDULE](#) [EXPORT](#)

	Number	Bib Record No.	Title	Author	Count
	1	b2319879	Lord of the fleas (catalog.)	Pilkey, Dav, 1966-	7
	2	b1949137	Silverlicious (catalog.)	Kann, Victoria.	6
	3	b1975003	That pup! (catalog.)	George, Lindsay Barrett.	6

Decision Center




Welcome, MHLtoconnell | [Admin Tools](#) | [Help](#) | [Sign out](#)

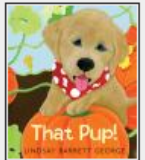
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[EMAIL / SCHEDULE](#) [EXPORT](#)

	Number	Bib Record No.	Title	Author	Count
	1	b2319879	Lord of the fleas (catalog.)	Pilkey, Dav, 1966-	7



Lord of the fleas / written and illustrated by Dav Pilkey as George Beard and Harold Hutchins ; with color by Jose Garibaldi.

[Pilkey, Dav, 1966-](#)
Material Type: Graphic Novel
Language: English
Record Number: [2319879](#)
ISBN: 9780545935173
Price Per Copy: \$6.04

DEMAND **23**

5 holds placed
18 non-hold circulations

SUPPLY **88**

56 current and on-order copies
1.58 circs / copy / month

hold queue 1
current hold wait time 0

Decision Center

- ▶ Reports can be:
 - ▶ Exported

Welcome, MHLtoconnell | [Admin Tools](#) | [Help](#) | [Sign out](#)

1 Initial Filters 2 Output and additional filtering

RECORD CREATED BEFORE 2/7/20 • COLLECTION All

EMAIL / SCHEDULE EXPORT

EMAIL / SCHEDULE EXPORT

Created Date	It...	
10/2/19	5	
11/29/18	5	
12/20/18	5	CHECKED IN

Microsoft Excel (*.xls)
Review File (*.bspool)
Adobe PDF (*.pdf)

OK Cancel

Decision Center

- ▶ Reports can be:
 - ▶ Exported
 - ▶ Emailed


Welcome, MHLtoconnell | [Admin Tools](#) | [Help](#) | [Sign out](#)

1 Initial Filters 2 Output and additional filtering

RECORD CREATED BEFORE 2/7/20 • COLLECTION All

EMAIL / SCHEDULE **EXPORT**

DC Decision Center <dc-mhud@iii.com>
Thu 4/2/2020 4:18 PM
Thomas O'Connell ▾

 Low_Circulation_Weeding.xls
3 MB

This is a system-generated report sent by Decision Center.

EMAIL / SCHEDULE **EXPORT**

Created Date	Items	Format
10/2/19	5	<input checked="" type="radio"/> Microsoft Excel (*.xls)
11/29/18	5	<input type="radio"/> Review File (*.bspool)
12/20/18	5	<input type="radio"/> Adobe PDF (*.pdf)

OK [Cancel](#)

CHECKED IN

Decision Center

- ▶ Reports can be:
 - ▶ Exported
 - ▶ Emailed
 - ▶ Scheduled

Welcome, MHLtoconnell | [Admin Tools](#) | [Help](#) | [Sign out](#)

1 Initial Filters 2 Output and additional filtering

RECORD CREATED BEFORE 2/7/20 • COLLECTION All

EMAIL / SCHEDULE EXPORT

Already Scheduled Reports:

Daily: 0
Weekly: 1
Monthly: 0
Particular Date: 0
Never: 0

Note: Click [here](#) to check already scheduled reports.

DC Decision Center <dc-mhud@iii.com>
Thu 4/2/2020 4:18 PM
Thomas O'Connell

Low_Circulation_Weeding.xls
3 MB

This is a system-generated report sent by Decision Center.

Created Date	Items
10/2/19	5
11/29/18	5
12/20/18	5

Microsoft Excel (*.xls)
Review File (*.bspool)
Adobe PDF (*.pdf)

OK Cancel

CHECKED IN

Brief break -

ILS Road Map - Next leg



Serials

ILL



Materials Booking

Patron Images







Encore
Harvesting

Serials



Serials: Current Workaround

Format	Description	Summary
1  Periodical	<p>Indexed Entry: <i>Food network magazine</i>.</p> <p>Food network magazine.</p> <p>1944-723X</p> <p>Adriance Adult, Arlington Boardman Road Adult, Athens Adult, Beacon Adult, Beekman Adult</p> 	<p>b18694810</p> <p>Available</p> <p>24 Items</p>
2  Periodical	<p>Indexed Entry: <i>Food network magazine</i> : [*for linking items and placing holds]</p> <p>Food network magazine : [*for linking items and placing holds]</p> <p>1944-723X</p> <p>Adriance Adult, Arlington Boardman Road Adult, Athens Adult, Beacon Adult, Beekman Adult</p> 	<p>b18694822</p> <p>Suppressed</p> <p>Not Available</p> <p>257 Items</p>

Serials: Current Patron View

Food network magazine

 Periodical | Hearst Communications, Inc. | c2008-

Not Available Now at Adriance Adult (ASK STAFF)

Additional actions:



Items

Location	Call No.	Status
Adriance Adult	Current 12 months	ASK STAFF
Arlington Boardman Road Adult	Current 12 months	ASK STAFF
Athens Adult	Current 3 months	ASK STAFF
Beacon Adult	Current 12 months	ASK STAFF
Beekman Adult	July/August 2019- Current	ASK STAFF

 Show more items

Serials: Staff View

b18694810

TITLE Food network magazine.

PUBLISHER Charlotte, NC : Hearst Communications, Inc., c2008-

STANDARD # 1944-723X

LOCATIONS adra , arla , atha , beaa , beka , brea , cata , chaa , dova , fkla , gara , grna , hur , laga , maha , mara ,

Summary

Record c14000258

Card c14000258

Holdings c14000258

Routing 0

Bib-Level Holds 0

Summary

View c Checkin

Attach New Checkin

Delete

Move

Select

#	Record Number	LOCATION	IDENTITY	STATUS	FREQUENCY	BOXES
4	c14000295	brea		Current	10 per year	10
5	c14000301	cata		Current	10 per year	10
6	c14000313	chaa		Current	10 per year	10
7	c14000325	dova		Current	10 per year	10
8	c14000337	fkla		Current	10 per year	10
9	c14000349	gara		Current	10 per year	10
10	c14000350	grna		Current	10 per year	10
11	c14000362	huna		Current	10 per year	10
12	c14000374	hura		Current	10 per year	10

Serials: Staff View - Checkin Card

b18694810

TITLE Food network magazine.
 PUBLISHER Charlotte, NC : Hearst Communications, Inc., c2008-
 STANDARD # 1944-723X
 LOCATIONS adra , arla , atha , beaa , beka , brea , cata , chaa , dova , fkla , gara , grna , hur , laga , maha , mara ,

Summary

Record c14000271
 Card c14000271
 Holdings c14000271
 Routing 0
 Bib-Level Holds 0

Card

Check-in date Create item

Jan/Feb 2020 ARRIVED 01-09-2020 1	Mar 2020 ARRIVED 03-01-2020 1	Apr 2020 ARRIVED 03-01-2020 1	May 2020 ARRIVED 05-01-2020 1	Jun 2020 ARRIVED 06-01-2020 1
Jul/Aug 2020 ARRIVED 07-01-2020 1	Sep 2020 ARRIVED 09-01-2020 1	Oct 2020 LATE 10-01-2020	Nov 2020 EXPECTED 11-01-2020	Dec 2020 EXPECTED 12-01-2020

Serials: Staff View - Holdings

b18694810

TITLE Food network magazine.
PUBLISHER Charlotte, NC : Hearst Communications, Inc., c2008-
DESCRIPT v. : ill.
DESCRIPT Bimonthly

Summary

New **Record**

New C... **New HOLDINGS**

New H... **New HOLDINGS**

New Routing **0**

Bib-Level Holds **0**

New Holdings

[Merge with Previous](#)

[Add New Range](#)

[Delete](#)

[Advanced Mode](#)

OPAC View

[Issues](#)

[Supplements](#)

[Indexes](#)


Current Year


866

Current Year

Serials: Patron Facing Clarity

Food network magazine

 Periodical | Hearst Communications, Inc. | c2008-
Available at LaGrange Adult (Jan/Feb 2019) plus 5+ more

 Request it

Additional actions:



Library Holdings

Location Athens Adult
Latest Received October 2020
Holdings Current 3 months

Location Beacon Adult
Latest Received September 2020
Holdings Current 12 months

Items

Beekman Adult	Jul/Aug 2020	CHECKED IN
Beekman Adult	Sep 2020	CHECKED IN
Beekman Adult	Oct 2020	DUE 10-13-20
Brewster Adult	January/February 2020	STORAGE
Brewster Adult	March 2020	STORAGE
Brewster Adult	September 2020	CHECKED IN
Brewster Adult	October 2020	CHECKED IN

Sign up for live training session:

Serials Training
Friday, October 30th
2:00 pm - 3:00 pm

Recording will be made available

Sierra Inter Library Loan

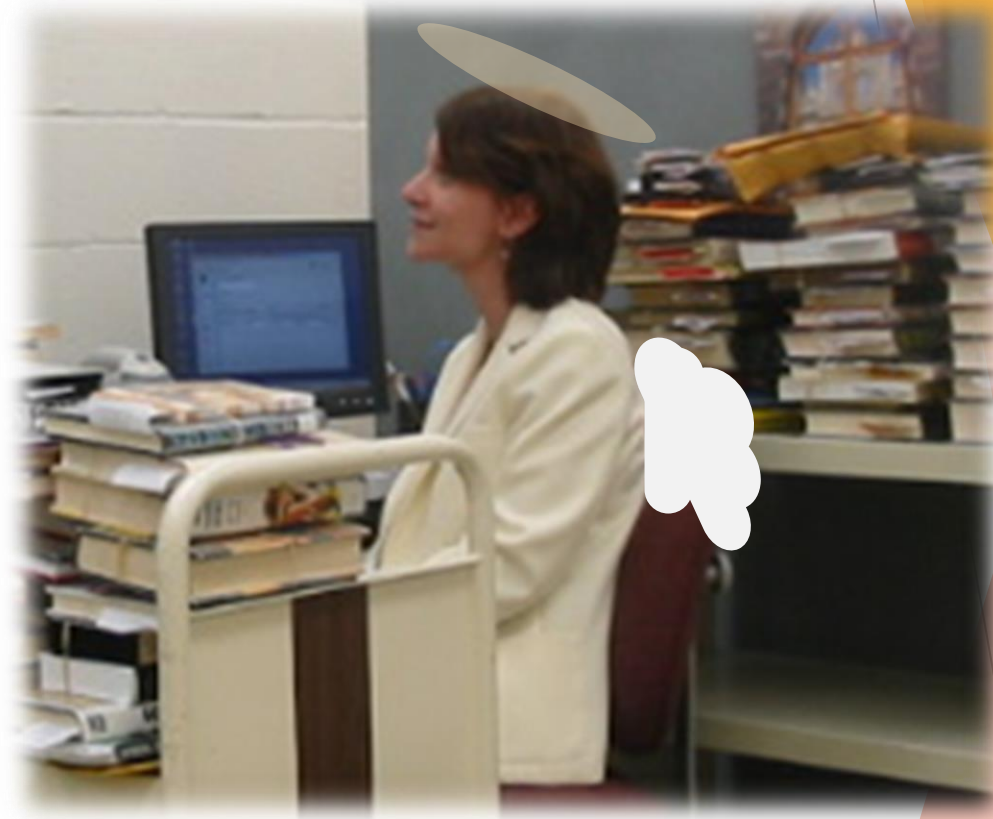
- Replace workaround process with an integrated solution
- Status visible to staff and patrons
- Analytics tracked in Sierra
- History tracked in patron record

Library - Workflow

- A round of tests to see if the request should be sent to OCLC
 - ✓ Seal
 - ✓ Amazon
 - ✓ Patron

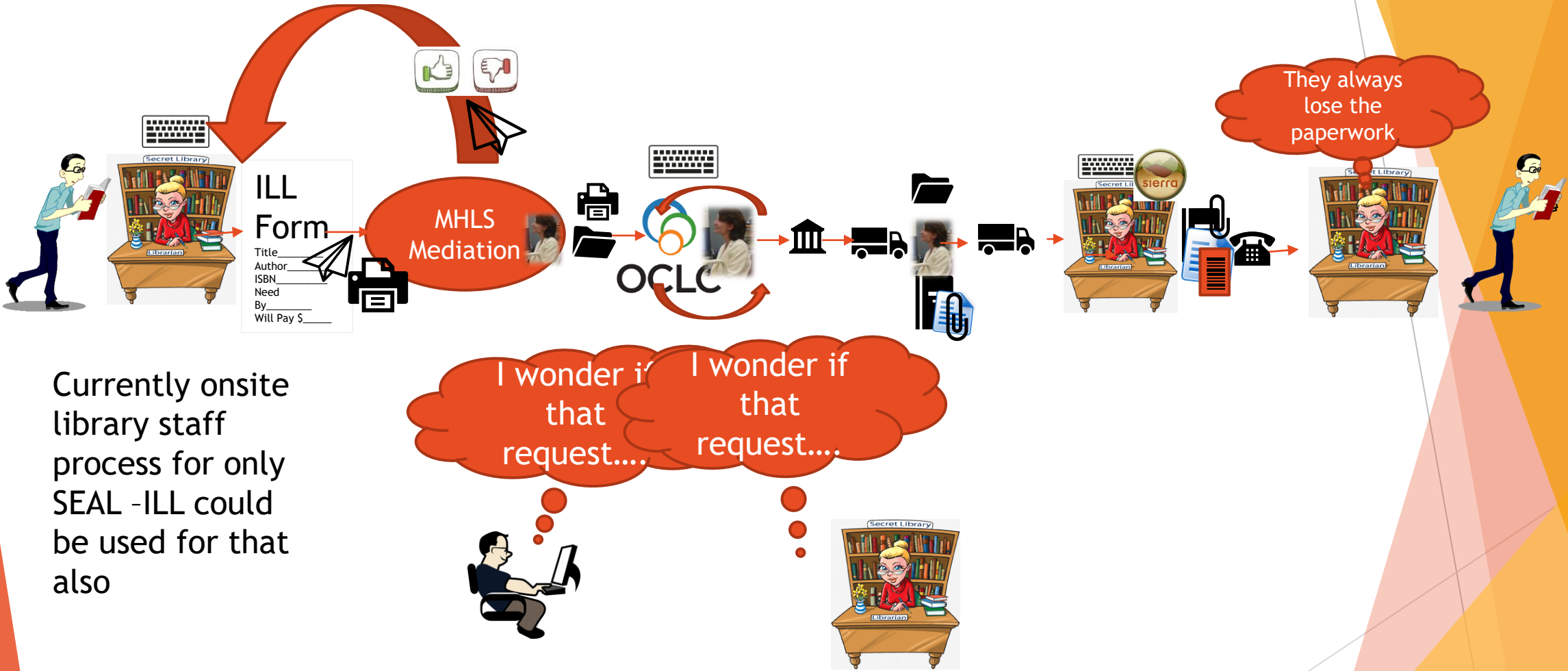
MHLS - Workflow

- Receive and print form
- A round of tests to see if the request should be sent to OCLC
 - ✓ Seal
 - ✓ Amazon
 - ✓ Patron
- 20% fail this filter**
- ✓ OCLC search
- ✓ OCLC Request made
- ✓ Paper form updated & Filed
- ✓ Request Monitored
- ✓ Received via OCLC
- ✓ Form pulled and sent with item



Mediation doesn't end once the request is made, until the item is returned. Check request - messages - due dates, etc..

MHLS Interlibrary loan order/receive workflow



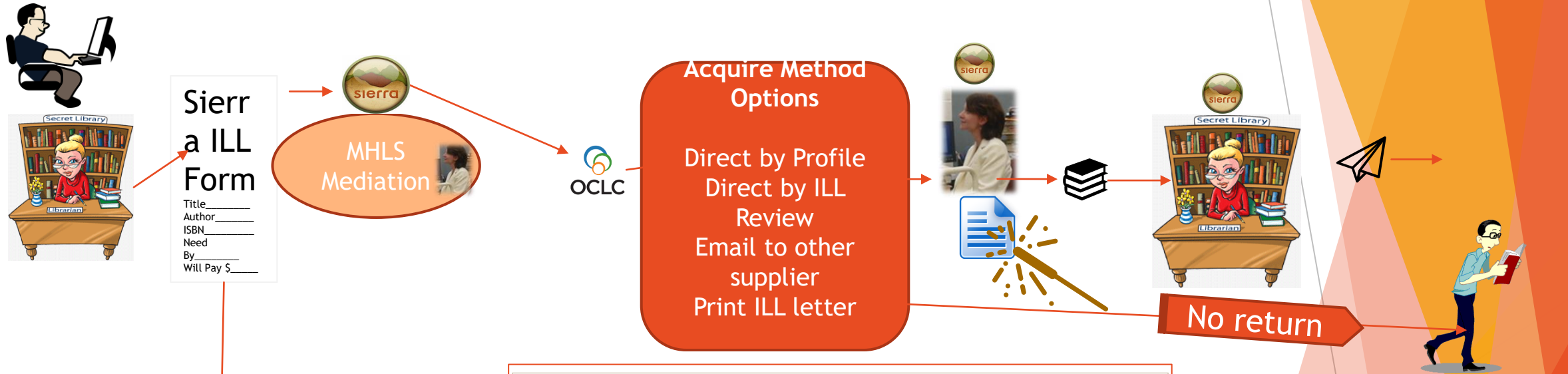
Currently onsite library staff process for only SEAL -ILL could be used for that also

I wonder if that request...

I wonder if that request...

This Photo by Unknon
Author is licensed under [CC BY-SA](https://creativecommons.org/licenses/by-sa/4.0/)

Sierra interlibrary loan order/fulfill workflow

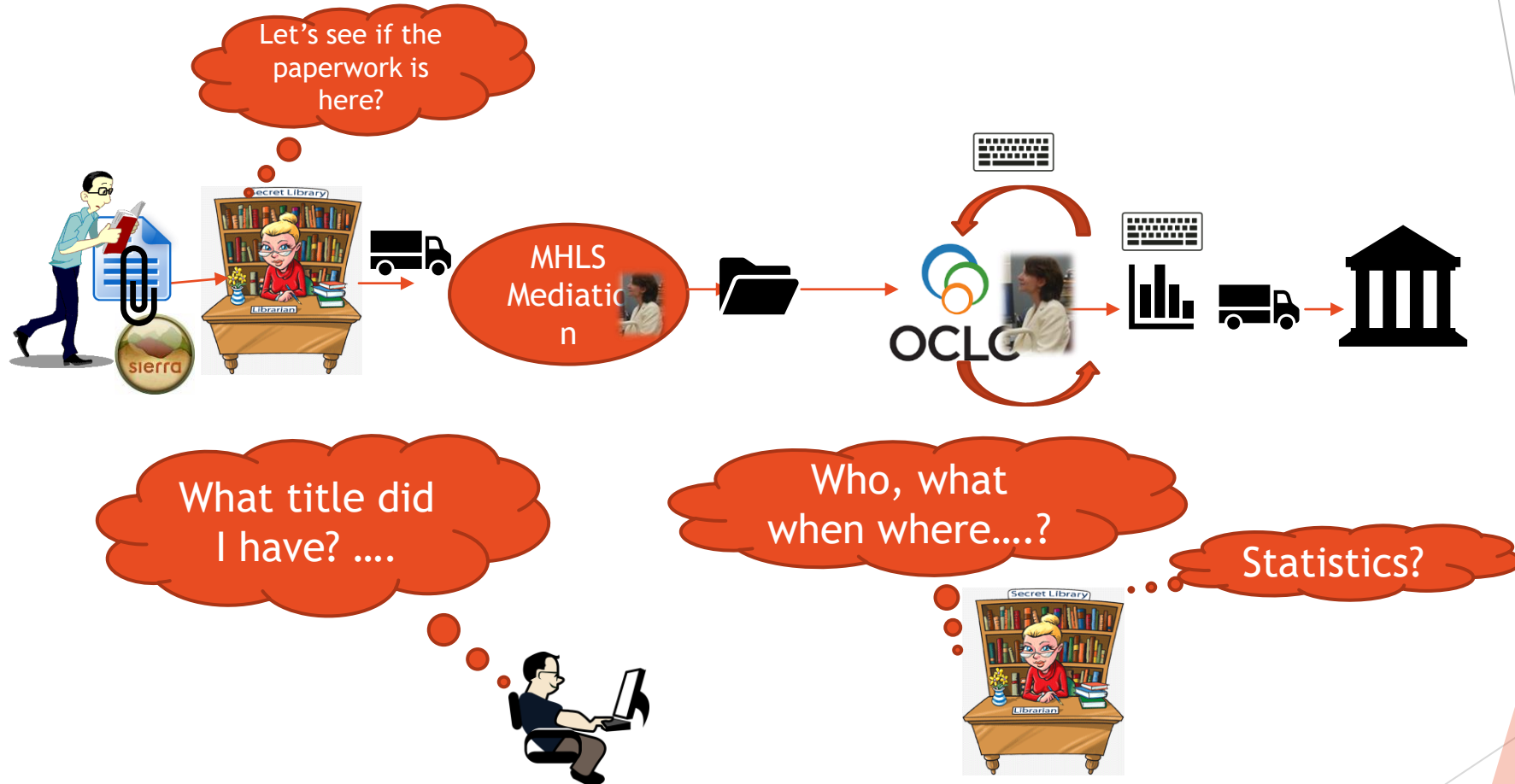


The Sierra ILL form creates a request record. The status of the request displays in the patron record.

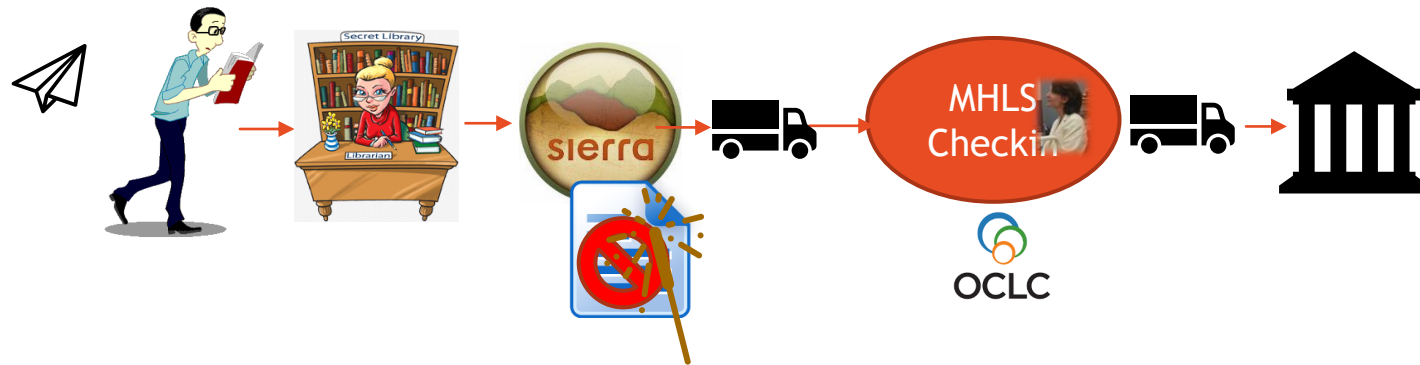
4 INTERLIBRARY REQUESTS			
TITLE	Ratings	STATUS	PICKUP LOCATION
The Road to Serfdom/University Of Chicago Press ;March 30, 2007;;\$1	☆☆☆☆☆	READY FOR PICKUP	Interlibrary Loan
Atlas Shrugged /Plume;August 1, 1999;No;\$1	☆☆☆☆☆	READY FOR PICKUP	Interlibrary Loan
The Wealth of Nations/Bantam Classics;March 4, 2003;No;\$1	☆☆☆☆☆	READY FOR PICKUP	Interlibrary Loan
Why Government Is the Problem/Hoover Inst Press;February 1993;No;\$1	☆☆☆☆☆	READY FOR PICKUP	Interlibrary Loan

Virtual record created from OCLC request when received to process through Sierra.

MHLS interlibrary loan return



Sierra interlibrary loan return workflow



Checkout / checkin does not require any special process, paperwork or dummy card. Virtual record is deleted, Sierra ILL request updated and stored.

Sierra retains information

- Transactional data stored
- ILL request record retained throughout the process
 - When live it displays in the patron view
 - Can later be retrieved in ILL module through patron record

Sign up for live training session:

**ILL Training 10am-12pm
Wednesday, December 16th
Or
Thursday, December 17th**

Recording will be made available

Materials Booking

- ▶ **Staff Training January 2021**
- ▶ Our new **Materials Booking** feature will allow patrons to “book” (*reserve*) library materials for future use.



Materials Booking

- ▶ Our new **Materials Booking** feature will allow patrons to “book” (*reserve*) library materials for future use.

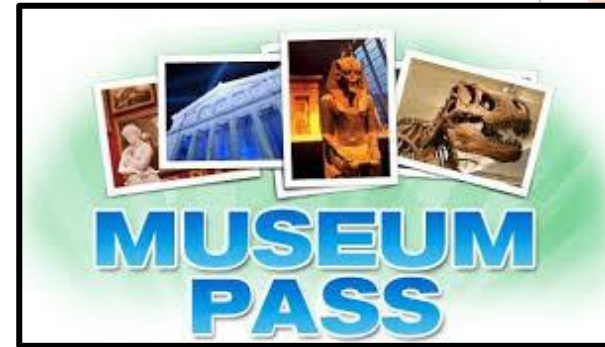
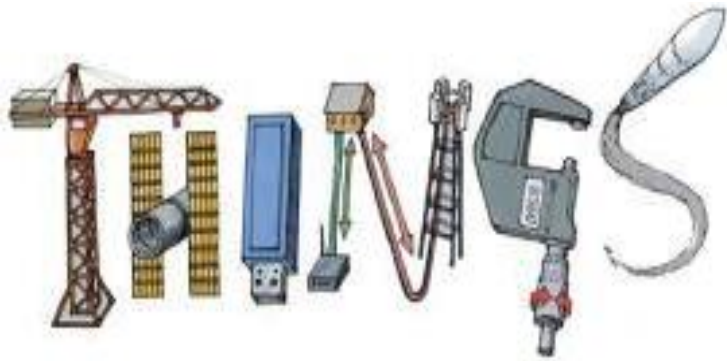


Materials Booking

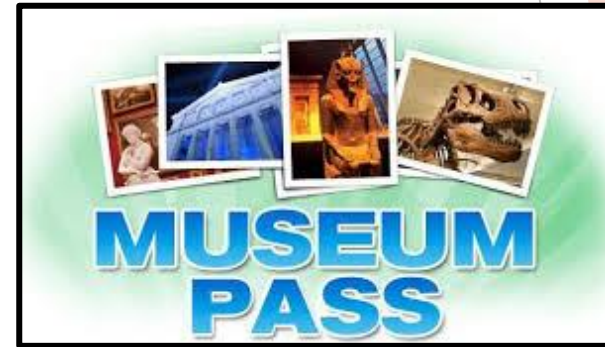
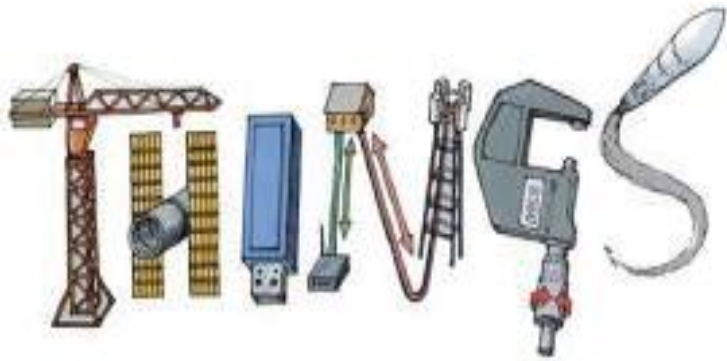
- ▶ Our new **Materials Booking** feature will allow patrons to “book” (*reserve*) library materials for future use.
- ▶ As long as there is an Item Record, the item can be **booked**.



Materials Booking



Materials Booking



- ▶ You could even choose to reserve rooms for community functions or events for community groups' recurring meetings.



Materials Booking



Materials Booking

b29559455

File Edit View Go Tools Window Help

Browse Save All View Edit PPro Summary Export Print Close

b29559455

AUTHOR STUDY ROOM A
TITLE STUDY ROOM A
LOCATIONS cnb
CONTINUES ON THE FLY

Summary

Record i40827975

Item-Level Holds 0

Bookings 0

Bib-Level Holds 0

Summary

View h Holds/Bookings

Hold Copy Returned Soonest Hold Selected Item Transfer Holds Book Any Available Item Book Selected Item(s) All

#	Recnum	Call Num	Barcode	Location	Due Date	Holds	Bookings
1	i40827975	STUDY ROOM A	37070000611020	cnxii	AVAILABLE	0	0

Materials Booking

b29559455

File Edit View Go Tools Window Help

Browse

Save All View Edit PPro Summary Export Print Close

b29559455

AUTHOR STUDY ROOM A
TITLE STUDY ROOM A
LOCATIONS cnb
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#	Recnum	Call Num	Barcode	Location	Due Date	Holds	Bookings
1	i40827975	STUDY ROOM A	37070000611020	cnxii	AVAILABLE	0	0

Materials Booking

The screenshot displays a library management software interface. A modal dialog box titled "Book selected item" is open, allowing for the configuration of a booking for a specific item. The background application window shows the item's details and a summary table.

Book selected item dialog box:

- Title: Jane Eyre / Charlotte Brontë ; edited by Margaret Smith ; wi
- Call No.: PB YA BRONTE
- Barcode: 31 298001794356
- Location: epaf
- Event Name: [Dropdown menu]
- Wanted From: -- -20 :
- Wanted To: -- -20 :
- Repeat Bookings: None [Dropdown menu]
- Booking Note: [Text area]
- Delivery options:
 - Patron will pick up
 - Deliver to
 - Deliver to and pick up from
- Location: [Text field]
- Buttons: OK, Show item calendar, Cancel

Main application window (b29559455):

File Edit View Go Tools Window Help

Browse

b29559455

AUTHOR STUDY ROOM A
TITLE STUDY ROOM A
LOCATIONS cnb
CONTINUES ON THE FLY

Summary

Record	i40827975
Item-Level Holds	0
Bookings	0
Bib-Level Holds	0

Summary

View: h Holds/Bookings

#	Recnum
1	i40827975

Available Item: Book Selected Item(s) All [Dropdown menu]

Due Date	Holds	Bookings
AVAILABLE	0	0

Materials Booking

The screenshot shows a dialog box titled "Book selected item" with the following fields and options:

- Title: Jane Eyre / Charlotte Brontë ; edited by Margaret Smith ; wi
- Call No.: PB YA BRONTE
- Barcode: 31298001794356
- Location: epaf
- Event Name: [Dropdown menu]
- Wanted From: - -20 :
- Wanted To: - -20 :
- Repeat Bookings: None [Dropdown menu]
- Booking Note: [Text area]
- Delivery:
 - Patron will pick up
 - Deliver to
 - Deliver to and pick up from
- Location: [Text field]

Buttons at the bottom: OK, Show item calendar, Cancel

- ▶ After you specify the booking parameters, Sierra attempts to book the item.

Materials Booking

Book selected item

Title: Jane Eyre / Charlotte Brontë ; edited by Margaret Smith ; wi
Call No.: PB YA BRONTE
Barcode: 31298001794356
Location: epaf

Event Name: [dropdown]

Wanted From: -- --20 :
Wanted To: -- --20 :

Repeat Bookings: None [dropdown]

Booking Note:

Delivery

Patron will pick up
 Deliver to
 Deliver to and pick up from

Location: [text field]

OK Show item calendar Cancel

- ▶ After you specify the booking parameters, Sierra attempts to book the item.

Booking calendar for: H082528


Show calendar legend

	05-21	05-22	05-23	05-24	05-25	05-26	05-27
8:00 am							
8:30 am							
9:00 am							
9:30 am							
10:00 am							
10:30 am							
11:00 am							
11:30 am							
12:00 pm							
12:30 pm							
1:00 pm							
1:30 pm							
2:00 pm							
2:30 pm							
3:00 pm							
3:30 pm							
4:00 pm							
4:30 pm							
5:00 pm							

- ▶ If the item has already been booked for any portion of the period that you specified, Sierra blocks the booking.

- ▶ This workflow can also be started from the patron record in the Circulation function,
 - ▶ Starting from the Bookings tab


Check Out	1
Checked-Out Items	3
Holds	2
Fines	\$0.00
Check In	0
Linked Patrons	0
Bookings	1
ILL	0
INN-Reach	0



▶ This workflow can also be started from the patron record in the Circulation function,

▶ Starting from the Bookings tab

Check Out	1
Checked-Out Items	3
Holds	2
Fines	\$0.00
Check In	0
Linked Patrons	0
Bookings	1



Bookings						
Add Booking Add Event View Booking Cancel Bookings Print Slips History						
All	#	Title	Call Number	From	To	Event
<input checked="" type="checkbox"/>	1	Bones [videorecording] / New Line Cinema presents a LL...	DVD epav	05-12-2012	06-02-2012	

Materials Booking

- ▶ Can be available in Encore for patron self management.
- ▶ Patrons will be able to book materials hours, days, weeks, and months in advance.
- ▶ Loan Rules manage eligibility and parameters.

Search: [Advanced Search](#)

Did you mean: study room a?

CatalogPlus **Catalog** **Articles**

Results 1 - 25 of 6860647 for STUDY ROOM B

Sorted by Relevance | Date

Refine by:

- Library Catalog (53)
- ERSCC EDS (6860594)

STUDY ROOM B
STUDY ROOM B
BOOK |



Materials Booking

- ▶ Requests are handled through a Bookings Maintenance function.

Location

Des Moines

All

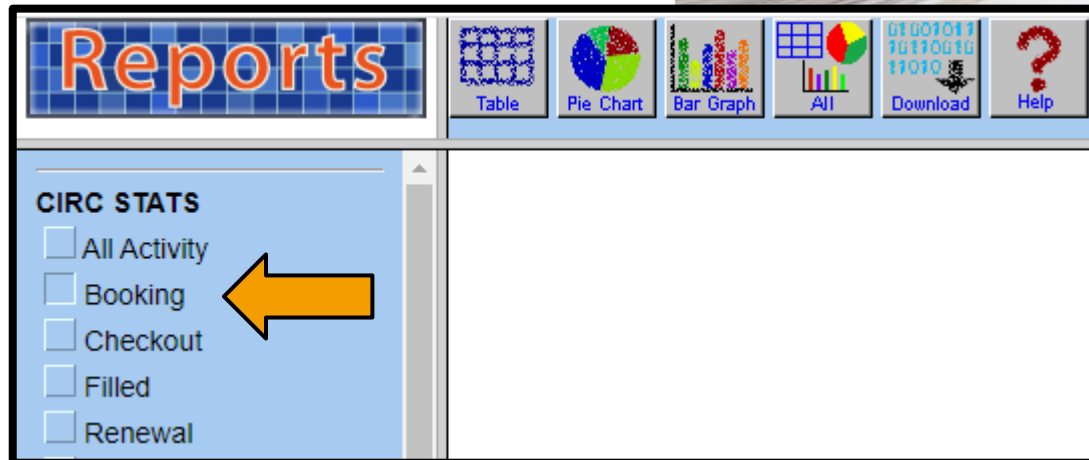
Select Location

Date Start Date Between End Date and Start or End Date

#	Date/Time	Title	Call #	Patron	Event	Pickup/Deli...	Status
1	07-01-2012	Books to grow on. Winter [kit]	JKT 574.543 WIN c...	booker lee			Current
2	07-01-2012	Oprah Winfrey : talk show legend ...	Y B WINFREY bd	Oprah	my book club	Studio 1	Current
3	07-01-2012	Oprah Winfrey : success with an ...	JB WINFREY becbg	Oprah	my book club	Studio 1	Current
4	07-01-2012	Shakespeare : a life / Park Honan.	B SHAKESPEARE ...	Delia Bacon	MLA 2012	Tallmadge	Current
5	07-01-2012 4:00PM	Reading Oprah : how Oprah's boo...	813.5409 FAR nb	Oprah	my book club	Studio 1	Current
6	07-12-2012	Moorings & metaphors : figures o...	810.9 beanf	Clark Kent	Comic-Con	Convention...	Current

Materials Booking

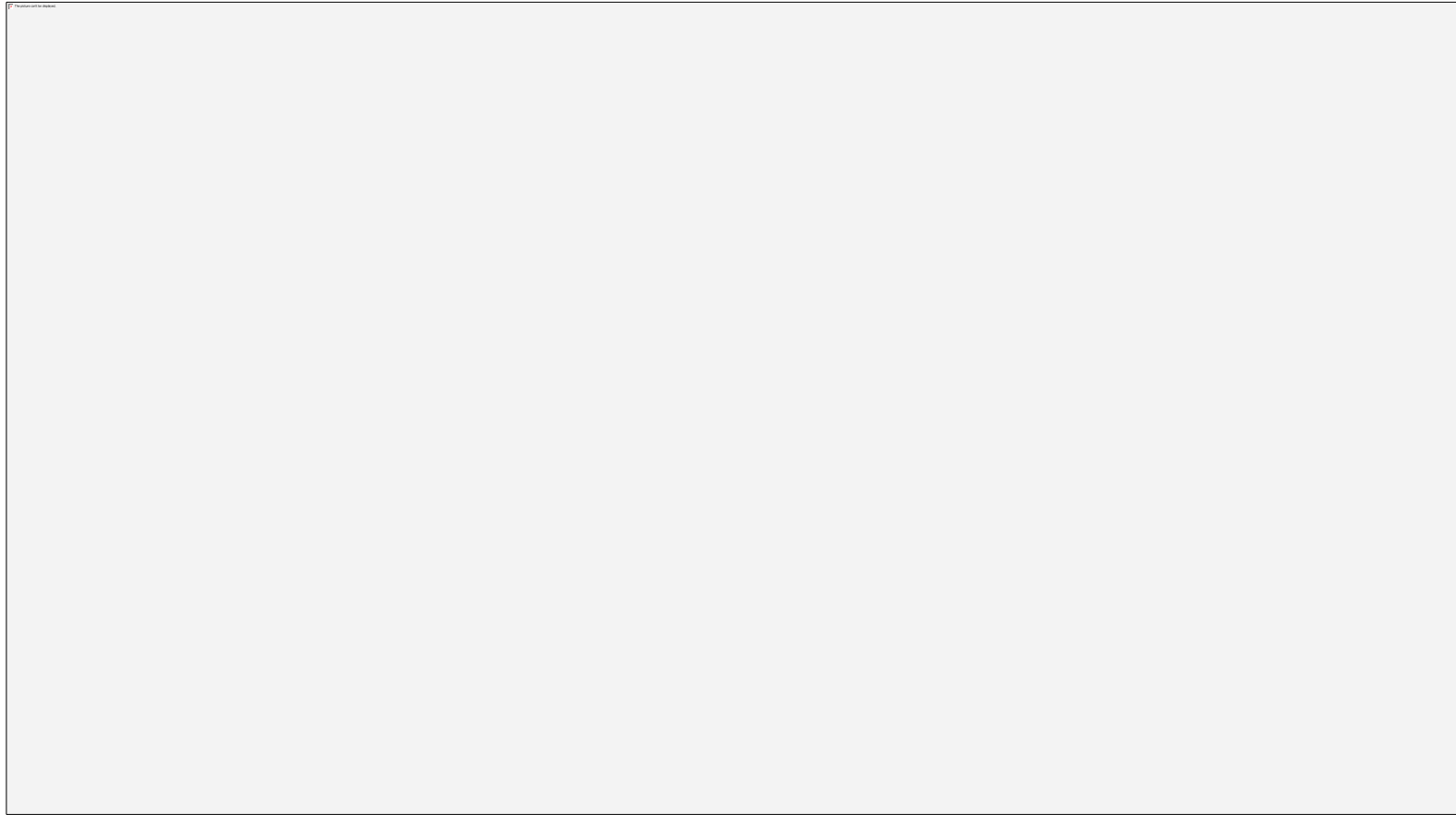
- ▶ **Reports?**
- ▶ Web Mgmt Reports Circ Activity report displays booking activity by patrons and items



Patron Images

- Link an image to the patron record for easier identification
- Image file stored on the Sierra server.
- Patron's images is an optional display
- Library can choose to implement or not (based on login)

Patron Images: Record view



Encore Harvesting



Search: [Advanced Search](#)

[Catalog](#) [CatalogPlus](#) [Images](#) [Articles and More](#)

[My Cart \(0 items\)](#) | [i](#) | [My Account](#) | [Logout](#)

[Catalog](#) [Catalog Plus Articles](#) [Articles](#)

Results 1 - 1 of 1 for first engine connecticut

Sorted by [Relevance](#) | [Date](#) | [Title](#) | [Author](#)

Refine by:

- Found In
- Title (1)

First Engine on Connecticut Western
Poughkeepsie Bridges
1875

[→ Media File ←](#)

Additional actions:



Encore Harvesting: metadata record

[← Back to results](#)

First Engine on Connecticut Western

Main and Market
Poughkeepsie Bridges

Additional actions:



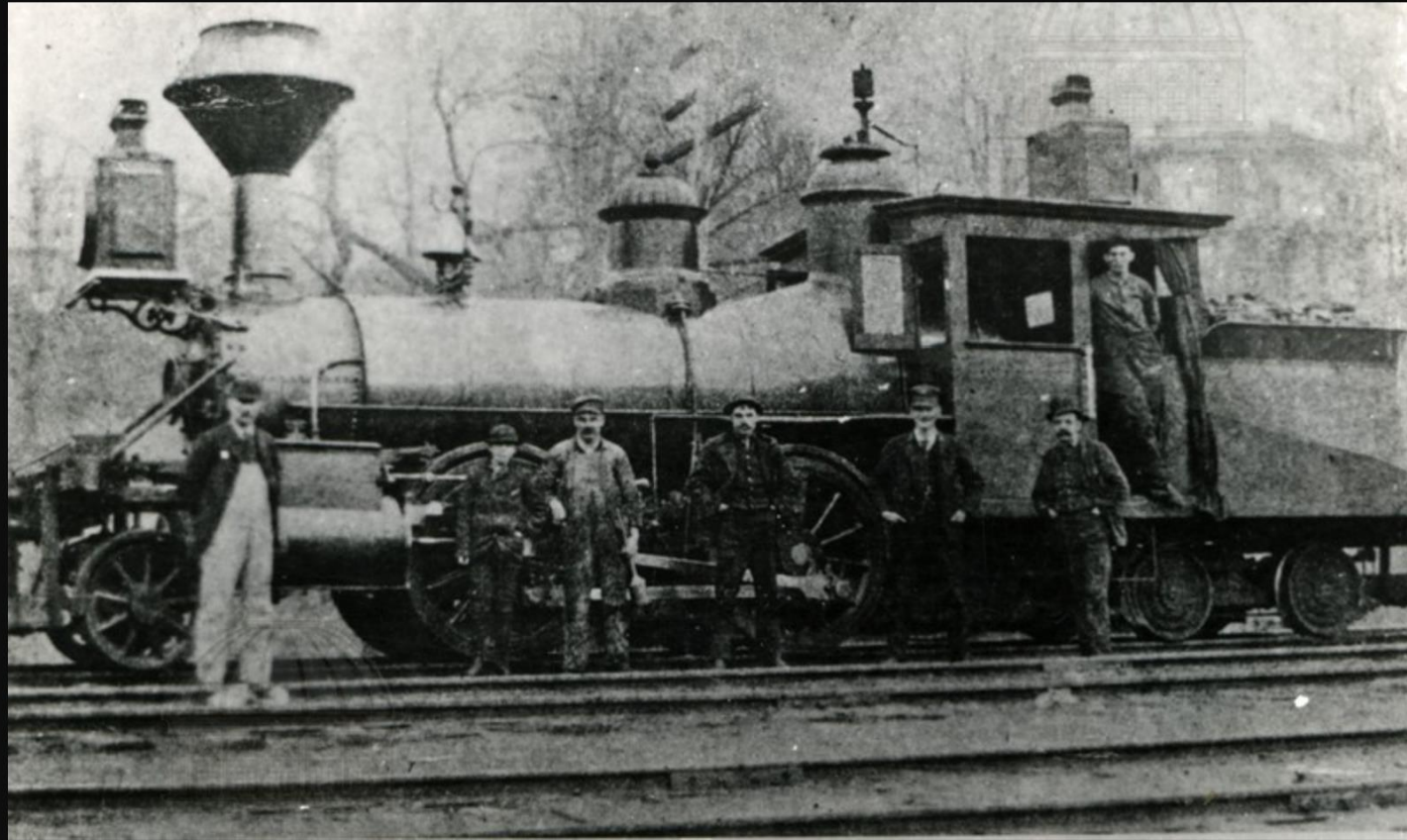
[→ Media File](#)



More Details

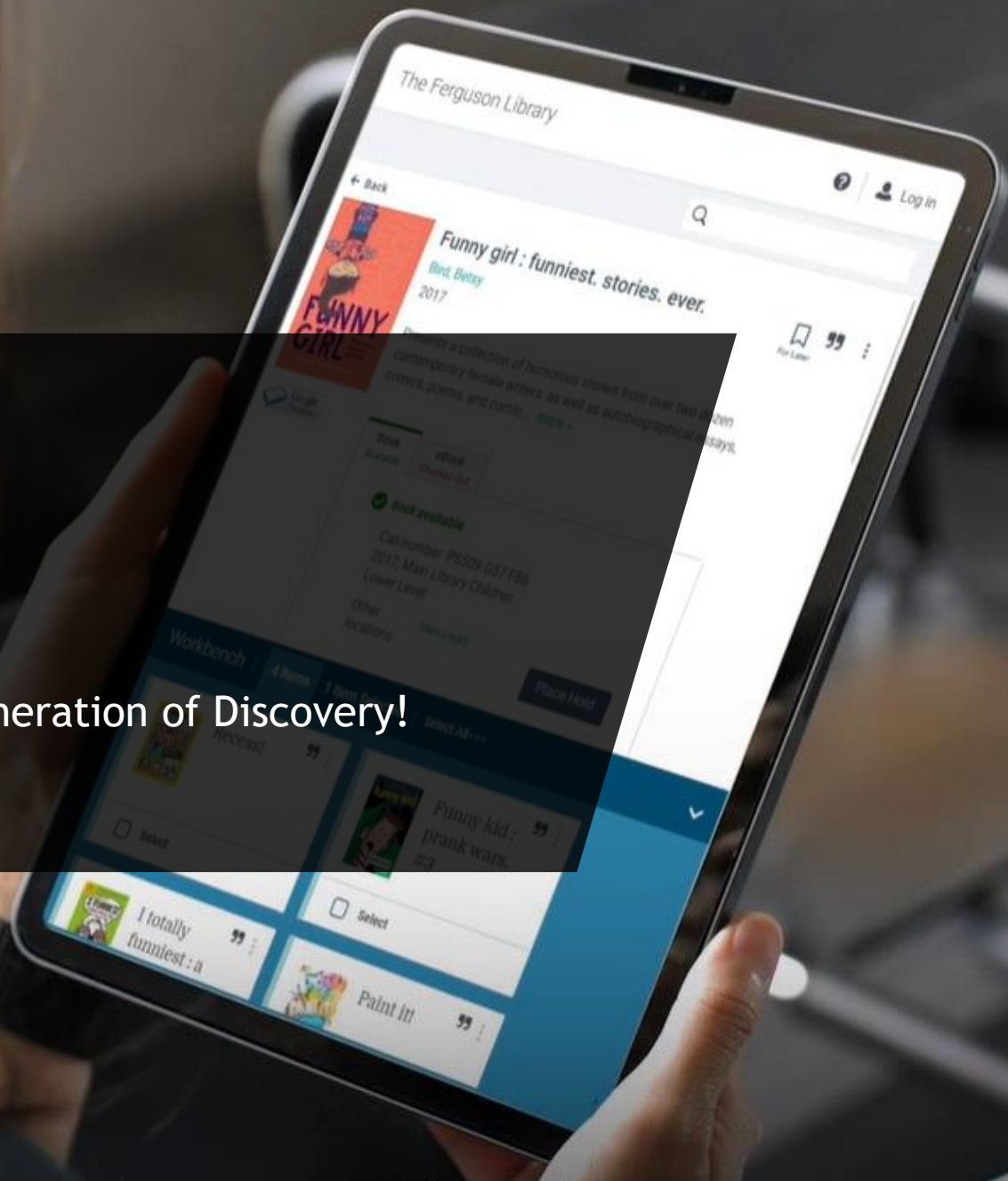
Identifier	60LD21
Identifier	http://mainandmarket.poklib.org/items/show/2871
Identifier	http://mainandmarket.poklib.org/files/original/4adcbea8b74f34be9b5baa45395f1f14.jpg
Subject	Poughkeepsie Railroad Bridge
Description	Engine & crew.
Date	1875
Coverage	Poughkeepsie, Dutchess County, New York
Repository Collection	Poughkeepsie Bridges
Collection	Main and Market

[Persistent link for this record](#)



Vega

The Next Generation of Discovery!





WHAT IS IT?

A place to view and post ideas that would make Sierra, Encore or other products we use better! Ideas then have an open forum to be discussed and voted on. Ideas that gain popularity are considered for development and inclusion in future releases.

WHO IS THIS FOR?

You! Library staff who use Sierra, Encore or other Innovative products now have a say in how the product evolves. We encourage you to raise your awareness of enhancements and help to promote ideas that help us to improve our services.

WHAT DO I DO?

- Create an account
- Vote to support ideas that are good for your library.

IDEA LAB

IDEALAB.III.COM

REGISTER TO JOIN THE CONVERSATION

Everyone has the opportunity to help us to move good ideas forward. Please consider creating an account and be ready to add your support by “liking” the ideas we let you know about. We will be working with other consortia and public libraries to promote high priority items that benefit our needs.





Open Discussion / Questions

Thank *you!*

The background features abstract, overlapping geometric shapes in various shades of orange and yellow, primarily concentrated on the right side of the frame. The shapes include triangles and polygons, some of which are semi-transparent, creating a layered effect. The overall aesthetic is modern and clean.