## Sierra Cataloging

The cataloging-related functions in Sierra enable you to manage all aspects of cataloging materials, including creating bibliographic, item, and authority records.

Underlined topics below are hyperlinks to the Sierra documentation (https://documentation.iii.com/sierrahelp/Default.htm) and other resources. Click on the link to open on browser, or right-click the text, select Copy Hyperlink and paste the URL directly into a browser.

> A copy of the Sierra documentation is located on your own server and can be opened from within the Sierra staff application: **Admin | Manual**. Hyperlinked text can be used to search for topics in the local copy of the documentation.

This schedule is flexible and subject to change.

## Introduction

- Introduction of trainer and trainees
- Logging in to the Sierra Desktop application or Sierra Web

## Record types created in cataloging

- Record types
  - Fixed-length fields
  - Variable-length fields
- Record types created in cataloging
- Bibliographic record display and Item record display
  - Previewing the public display of bibliographic records

## Creating bibliographic records

- Transfer bibliographic records from bibliographic utility
  - Data Exchange: importing and exporting records
- Searching for records in a remote database (Z39.50 records download)
  - Overlaying an existing record with a new record from a remote search and Updating OCLC holdings (optional)
- Creating bibliographic records

## Maintaining records

- Modifying fields with multiple copies or funds (bibliographic "multi" locations)
- Editing special variable length fields (006, 007, 008)
- Entering diacritics and special characters
- Moving (re-ordering) variable-length fields
- Validating MARC tag information

- <u>Verifying record headings</u>
- <u>Copying records</u>
- <u>Using multiple windows</u> (comparing multiple records on the same screen)
- <u>Viewing bibliographic record history</u> (optional)
- <u>Deleting records</u> (bibliographic)

## Creating item records

- <u>Creating item records</u>
  - o Single item record
  - o Multiple item records
- <u>Printing monographic labels</u> (spine labels) (discussion only)
  - o <u>Printing batch labels</u> (using label printer)
  - o <u>Batch printing monographic labels using print templates</u>

## Maintaining item records

- <u>Changing the link order of records attached to the bibliographic record</u>
- <u>Sorting item records by volume</u> (Location/Call no./Volume sort)
- <u>Modifying a group of records from the summary display</u>
- <u>Transferring attached records</u>
- <u>Linking items to additional bibliographic records</u>
- <u>Deleting records</u> (item)

## <u>Creating volume records</u> (optional product)

## Authority control processing

- <u>Creating authority records</u>
- <u>Using headings reports</u>
- <u>Automatic authority control processing</u> (discussion only) (optional product)
- <u>Globally updating records</u> to maintain or modify headings (discussion only)
- <u>Scope authority records</u> (discussion only)

## Reports and statistics in cataloging

- <u>Creating lists (review files)</u>
- <u>Using Statistics</u>
- <u>Using Web Management Reports</u>
- <u>Displaying record maintenance statistics</u>

## Database maintenance and reporting

- Globally updating records
- Rapid updating of records
- Delete records (batch deletion of records)
- Verifying URL's with URL checker (optional product)

## System settings and additional functions

- Templates for new records
- Database maintenance options
- MARC format validity tables (discussion only)
- Group call numbers for statistical reports (SCAT tables)
- Daily record link maintenance
- System status

## Preparing to go live with cataloging

- Discussion of what to do to prepare for going live with cataloging
- Sierra Cataloging checklist

## Supporting documentation

- Sierra WebHelp – Browse tab
- Sierra LibGuide

Please feel free to evaluate your training experience by filling out the Training Survey form at https://innovative.libwizard.com/f/training-feedback