Sierra Encore/WebPAC Administration

Innovative’s discovery platform Encore is often the library’s main search tool. Encore is designed to be plug and play with little customization required before going live. The trainer lead session is focused on providing clarification or answers to outstanding questions.

Innovative’s traditional catalog, WebPAC, is currently used for additional features and patron services such as self-registration for patrons, featured lists and suggestions. This training explains the setup and customization to implement these features.

Underlined topics below are hyperlinks to the Encore Library Staff Guide ([https://csdirect.iii.com/manual\_encore/](https://csdirect.iii.com/manual_encore/Default.php)). Underlined topics below are hyperlinks to the Sierra WebHelp (<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.

Some menu paths are included in parentheses.

This schedule is flexible and subject to change.

# Introduction

* Introduction of trainer and trainees
* [Sierra Administration Application](http://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_app.html)
* [Logging in to the Sierra Desktop Application](http://documentation.iii.com/sierrahelp/Default.htm#sdesktop/sdesktop_logging_in.html) (SDA) or [Sierra Web](https://documentation.iii.com/sierrahelp/Default.php#sweb/sweb_accessing.html) (SW)
* [Admin Corner](https://documentation.iii.com/sierrahelp/Default.php#sadmin/sadmin_admin_corner.html)

# [Encore administration and configuration](http://csdirect.iii.com/manual_encore/Default.htm" \l "encore_admin_config.html)

* [Using the Administration application](https://csdirect.iii.com/manual_encore/Default.php" \l "encore_admin_adminapp.html)
* [Using Encore Suites](https://csdirect.iii.com/manual_encore/Default.php#encore_admin_adminapp_suites.html) (optional product for consortia)

## Encore

* [Customizing Encore](https://csdirect.iii.com/manual_encore/Default.php" \l "encore_config_customizing.html)
  + [Customizing facets](https://csdirect.iii.com/manual_encore/Default.php" \l "encore_config_facets.html)
  + [Customizing patron page functions](https://csdirect.iii.com/manual_encore/Default.php" \l "encore_config_patron_page.html)
* [Customizing Encore messages](https://csdirect.iii.com/manual_encore/Default.php" \l "encore_config_customizing_messages.html)
* [Patron administration](http://csdirect.iii.com/manual_encore/Default.htm" \l "encore_admin_adminapp_patron.html)
* [Administering community tagging](https://csdirect.iii.com/manual_encore/Default.php" \l "encore_admin_adminapp_tagging.html)

## [Configuring custom Encore search tools](https://csdirect.iii.com/manual_encore/Default.php" \l "encore_config_customizing_search.html)

* Add an Encore passthrough search box to a web page
* Add a pre-scoped Encore search box to a web page
* Construct stable URLs

## Other optional features

Some customization may require Innovative assistance for Encore use (Web Options for Encore)

* [My Lists](https://csdirect.iii.com/manual_encore/Default.htm#encore_feat_cart_listing.html) (enabled by default)
* [Reading History](http://documentation.iii.com/sierrahelp/Default.htm#sgwpac/sgwpac_setup_readhist.html)
* [Alternate IDs](http://documentation.iii.com/sierrahelp/Default.shtml#sgwpac/sgwpac_setting_up_altids.html) / [Patron Alias](http://documentation.iii.com/sierrahelp/Default.shtml#sgcir/sgcir_maint_createpatalias.html)

# Patron login screen

* [Implementing the Innovative integrated login page](http://documentation.iii.com/sierrahelp/Default.htm#sgwpac/sgwpac_integrated_login.html)
* [The ipsso.html file](http://documentation.iii.com/sierrahelp/Default.htm#sril/sril_ipsso.html) (Web Master | Login App Configuration)
  + Customizing the ippso.html login page
  + Previewing changes to the ippso.html login page (http://[domain]/apps/CAS/resources/ipsso.html)
* Additional configurations require setup by Innovative
* [Refreshing web applications](https://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_webmaster_refresh.html)

# WebPAC administration and configuration

To maintain the WebPAC you must be able to write simple HTML code. Innovative does not provide assistance with HTML code, editing JPG and GIF files, or other standard practices of web site maintenance.

## Optional features integrated with WebPAC

* [Patron self-registration](http://documentation.iii.com/sierrahelp/Default.htm#sgwpac/sgwpac_patron_selfreg.html) (optional product)
* [Featured Lists](http://documentation.iii.com/sierrahelp/Default.shtml#sgwpac/sgwpac_featured_lists.html)
* [Additional items to acquire](https://documentation.iii.com/sierrahelp/Default.php#sgwpac/sgwpac_additional_item.html)
* [Patron suggestions](https://documentation.iii.com/sierrahelp/Default.php#sgwpac/sgwpac_suggestions.html)
* [Feeds](http://documentation.iii.com/sierrahelp/Default.htm#sgwpac/sgwpac_incoming_feeds.html)
* Staff view of WebPAC (discussion)

## Maintaining the WebPAC

* [Maintaining the WebPAC](http://documentation.iii.com/sierrahelp/Default.htm#sgwpac/sgwpac_web_opac_manage.html)
  + Live directory (:80) and Staging directory (:2082) for testing design

## Web Master

* [Administering Web Master options](http://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_useraccts_auths_users_options_web_master.html)  (Admin App, user setup: Options – Web Master tab)
* [Using Web Master](http://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_web_master.html)
  + [Viewing, editing and deleting files](http://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_web_master_view_files.html)
    - Replace live files with staging files
  + [Refreshing web applications](http://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_webmaster_refresh.html)

## [Web Options](http://documentation.iii.com/sierrahelp/Default.shtml" \l "sril/sril_web_options.html)

* [Updating Web Options](http://documentation.iii.com/sierrahelp/Default.htm#sgwpac/sgwpac_update_web_opt.html)
  + Adding or removing a Web Options file (SDA/SW: Admin | Settings | Web Options tab)

* [Alphabetical list of Web Options](http://documentation.iii.com/sierrahelp/Default.shtml" \l "sril/sril_alpha_wwwoption_list.html)
* [Requesting options](http://documentation.iii.com/sierrahelp/Default.shtml" \l "sril/sril_requesting_options.html)

## [Customizable web forms](http://documentation.iii.com/sierrahelp/Default.htm#sril/sril_web_forms.html)

* Tokens
* [Command links](http://documentation.iii.com/sierrahelp/Default.htm#sril/sril_command_links.html)
  + /acquire – recommendation for purchase
  + /donate – requires ecommerce (optional product)
  + /ftlist – featured lists
  + /feeds – incoming feeds
  + /selfreg – patron self registration (optional product)
  + /suggest – make a suggestion

# Admin Corner

* [OPAC options](http://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_options_opac_options2.html) (A> A> S> O> O)
* [Circulation options](http://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_options_circ.html) (A> A> S> O> C)
* [Restart a terminal](http://documentation.iii.com/sierrahelp/Default.shtml#sadmin/sadmin_admin_corner_restartterminal.html) (A> R)
* [Restart the HTTP server](https://documentation.iii.com/sierrahelp/Default.php#sadmin/sadmin_admin_corner_restart_http.html) (A> H)

# Supporting documentation

* [Sierra WebHelp](http://documentation.iii.com/sierrahelp/Default.shtml)
* [Sierra Knowledge Base](http://documentation.iii.com/sierra/kb/index.php)
  + [Sierra WebPAC Options and OPAC System Options FAQ](http://csdirect.iii.com/sierra/kb/article.php?cat_id=8&typ_id=4&art_id=688)
* [Encore Staff Guide](http://csdirect.iii.com/manual_encore/Default.shtml)

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