Sierra Desktop overview for migrating libraries

This session is aimed at familiarizing users migrating from Millennium to Sierra with the Sierra Desktop Application interface. The session focuses on general navigation and the differences between the Millennium and Sierra interfaces, and comments on new functionality available in Sierra.

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 Sierra server and can be opened from within the Sierra Desktop: **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
* [Using the Sierra Desktop](https://documentation.iii.com/sierrahelp/Default.php#sgil/sgil_sdesktop_intro.html) (SDA)
  + [Sierra Web](https://documentation.iii.com/sierrahelp/Default.php#sweb/sweb_overview.html) *[not available during preview]* - http://[your Sierra app server]/sierra/sierraweb/
* [Logging in to the Sierra Desktop Application](http://documentation.iii.com/sierrahelp/Default.htm#sdesktop/sdesktop_logging_in.html)

# Sierra Desktop Application

* [Accessing functions](https://documentation.iii.com/sierrahelp/Default.php#sgil/sgil_functions_changing.html)
  + **FUNCTION** menu with customizable workflows
  + **Go** menu with same functions organized by area, in (English) alphabetical order
* Look and feel
  + Glacier Point or Half Dome
    - Admin | Settings | Display | Look and Feel – Skin
* Macros
  + Admin | Settings | Macros
  + [What must I do to make my imported macros work in Sierra?](https://documentation.iii.com/sierra/kb/article.php?cat_id=21&art_id=23) (Sierra Knowledge Base article)
* Customization options available to individual user
  + Settings – requires permission to save permanently (Admin | Settings)
  + Options – only available to users with permission (Admin | Options)
  + Preferences – to save permanently, requires user is allowed to edit (Edit | Preferences)
  + Change password - only available to users with permission (Admin | Change Password)

## [Retrieving records](https://documentation.iii.com/sierrahelp/Default.php#sgil/sgil_search.html)

* [Searching selected database indexes](https://documentation.iii.com/sierrahelp/Default.php#sgil/sgil_search_database.html)
  + Search functions (menu path from Go menu)
    - Acquisitions | Place Orders
    - Cataloging | Catalog
    - Circulation | Search/Holds
    - Serials | Serials Checkin
    - Electronic Resource Management | Catalog ERM
    - Program Registration | Program Management
  + Record view properties
    - View | Record View Properties
  + [Graphical browse](https://documentation.iii.com/sierrahelp/Default.php#sril/sril_browse_results_display.html) or [Compact browse](https://documentation.iii.com/sierrahelp/Default.php#sril/sril_compact_browse_display.html)
    - Admin | Settings | Display | Browse Options
  + Facets
    - Phrase facet – not available in Keyword index or with Compact Browse
    - Collection facet (scopes) – only available in Keyword index
  + [Limiting a search](https://documentation.iii.com/sierrahelp/Default.php#sgil/sgil_search_limiting.html)
    - Plus (+) symbol, or Tools | Limit
    - Location limit controlled by new “Public” element in Branches table
      * Admin | Parameters | General | Branches
* [Searching for records in a remote database](https://documentation.iii.com/sierrahelp/Default.php" \l "sgil/sgil_search_remote.html)
  + Drop-down menu in search tool: change from Local to Remote
  + Change databases to search: Tools | Select Databases
* [Retrieving patron records](https://documentation.iii.com/sierrahelp/Default.php#sgcir/sgcir_patron_retrievingapatron.html)
  + Check Out (Circulation Desk) function
  + Go | Circulation | Check Out (Circulation Desk) | Check Out
* [Browse Query](https://documentation.iii.com/sierrahelp/Default.php#sgil/sgil_search_browse_query.html)
  + Tools | Browse Query

## [Record displays](https://documentation.iii.com/sierrahelp/Default.php#sril/sril_record_disp_intro.html)

* [Bibliographic record display](https://documentation.iii.com/sierrahelp/Default.php#sril/sril_disp_bib.html)
* [Patron record display](https://documentation.iii.com/sierrahelp/Default.php#sril/sril_disp_patron.html)
* Search tool available at the top
  + Browse (Back to Browse) vs Close

## Create Lists

* Classic / Enhanced / JSON queries
  + [How Create Lists works](https://documentation.iii.com/sierrahelp/Default.php#sgil/sgil_lists_how_cl_works.html)
* [Creating a new review file](https://documentation.iii.com/sierrahelp/Default.php#sgil/sgil_lists_new_review_file.html) by importing record numbers from a text file
* [Property fields](http://documentation.iii.com/sierrahelp/Default.php#sgil/sgil_lists_bool_properties.html) – holds, fines, payment details and more
* New date range expressions (equals today, equals yesterday, within last week, etc.)

## Reports

Access to Web Management Reports via:

* Reports | Circulation Activity Reports (Spreadsheet interface)
* Reports | Web Management Reports (Browser interface)

## What has moved?

* To Sierra Desktop from character based: Globally Purge Charges
* From Millennium client to Admin App: Scheduler

# Sierra Web

* **Available after go-live**
* Browser based, limited to 60 user licenses (as of Sierra 5.0)
  + Optimized for Google Chrome
* Same functions as the Sierra Desktop Application
* Access controlled in user administration (Options – Login – Sierra Access Method)

# Supporting documentation

* [Sierra documentation](https://documentation.iii.com/sierrahelp/Default.php)
* [Sierra LibGuide](https://innovative.libguides.com/sierra/welcome)
  + [Content Tagged: Migrating](https://csdirect.iii.com/sierra/kb/index.php?cat_id=9998&tag_id=40)

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