Cataloging Quick Start Guide

sierra

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Cataloging provides a graphical user interface to your Sierra system's Catalog Database Maintenance subsystem. The functions in the Sierra Cataloging workflow enable you to:

- Load files of records
- Create bibliographic, item, authority, and other records.

- Edit existing records.

- Perform complex global updates or simpler rapid updates.

- Create lists of records (review files).

- Delete records.
- Verify Record Headings

Log In

The cataloging functions are done in the Sierra Desktop Application (SDA). In addition a user with administrator permissions can perform tasks in the Admin Corner of the Administration Application.

Record Fields

All Sierra record types (i.e.: Bibliographic, Item, Holdings, Authority, Patron, etc.) consist of fixed-length fields and variable-length fields.

Each Fixed-length field contains a specific code, numeric or alphabetic or alphanumeric, which is selected from the set of valid codes for that field. Each fixed-length field for a particular record type appears in every record of that type. Fixed-length fields are not repeatable. Valid codes are established in the System Codes section, and modification, addition, or deletion of these code values are performed only by a user with appropriate authorizations to modify codes in the system.

All variable-length fields are repeatable. Some fields have a specific use and are automatically generated by the system (such as PAID and ROUTING fields.) Other fields, (i.e.: NOTE), are available for you to enter free text. Some variable-length fields can be indexed, and may be used to retrieve records. The library may ask Innovative to index certain fields (not all) if they are not already indexed (for example, Publisher).

Custom Settings and Preferences

Many Sierra functions are customizable (for example: screen and text colors, font and font size, new record template creation and maintenance, print templates, and a number of other Sierra functions.) Please refer to the *Sierra WebHelp* for a detailed discussion and instructions on how to optimize the use of the Sierra Cataloging module.

If you encounter difficulty following the links, try the links on Chrome, or go directly to http://csdirect.iii.com/sierrahelp , log in and search for the topic.

You can use the keyboard or the mouse to edit records in Sierra. Review the information in the *Sierra WebHelp*

New Record Templates

The Sierra system uses new record templates to create new records. A new record template can be configured by the library to prompt the user to fill in specific fields. A new record template can also be configured by the library to contain default data in certain fields which is automatically inserted into the record during the new record creation process. An authorized user from the library may configure an unlimited number of new record templates in the Sierra System. This is done in the drop-down menu Admin | Settings | Record Templates *tab*.

System Options for Cataloging

There are a number of system options that control certain behaviors within the Sierra environment. These Database maintenance options are used to customize functions such as some customizing label formats, use of print templates, and duplicate check fields for new record entry, etc. They also include editing MARC validity tables.

Creating and Editing Bibliographic Records

Create, edit and delete Bibliographic, Item and Authority records.

- Catalog is the default function in the Cataloging workflow

- Record display is in MARC tag order

- It is possible to create new Bibliographic, Item, and Authority records in this mode

- It is possible to create new Bibliographic, Item, and Authority records field by field using a new record template. It is also possible to download records from a Bibliographic utility or subsequent to a Z39.50 search. The downloading process may be one-by-one or using a batch file of records, depending on library preference. More details on downloading files of records can be found in the "Load Batch Files of Records Using Data Exchange" portion of this document

- Optionally, it is possible to use prompts in the new record creation templates (known as the "wizard") to create records individually.

- Fixed fields which are prompted in the "wizard" are always presented first for completion.

  – Press the space bar or double click in the white area of the prompt box to view all valid values
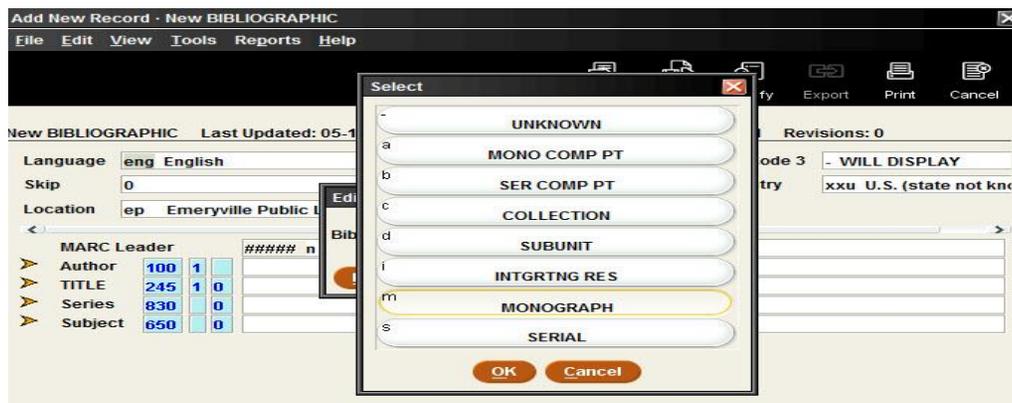
  – Select from the list of valid values using the mouse and clicking on the appropriate line of the choice, or using the up or down arrows on the keyboard, or typing a valid code in the white data box. Any of these methods may be used.

- – Press <Enter> or click the **Next** button to move to the next prompted field

  - – If there is no change to a presented field, or to accept the value already inserted in the fixed field, press <Enter> or click the **Next** button**.**

- Variable length fields for which there are prompts in the new record template display in the upper portion of the screen in a wide, short rectangle area.

  - – Display of specific MARC tags and indicators can be controlled by typing the number for the appropriate MARC tag and for any necessary indicators in the new record template when the template is created. This will be a way to identify essential MARC tags to be inserted into new Bibliographic or Authority records. To create, modify, of delete new record templates, use the dropdown menu **Admin | Settings | Record Templates**.

  - – To change the MARC tag or the indicators in a record, use the mouse to move the cursor, backspace with the backspace key, or use the arrow key to move the cursor back to the appropriate position in the MARC tag field, and type the appropriate data in the fields.

  - – When continuing with the new record template, type the data desired into the white area of the prompted data box and press the <Enter> key, type <Alt> N, or click the **Next** button to go to the next prompt

  - - MARC tags do not display for non-MARC records. New Record Templates can be created to display non-MARC field labels instead of MARC field labels. This is accomplished by inserting the non-MARC field label into the new record template instead of the actual MARC tag and indicator values.

Transfer Bibliographic records from Bibliographic utility or database, including OCLC or Skyriver

It is possible to download records from a bibliographic utility such as OCLC or Skyriver (see http://csdirect.iii.com/documentation/oclcnew.shtml for more details on downloading from OCLC. Additional information regarding downloading records is available on CSDirect here: http://csdirect.iii.com/documentation/recloadbasics.shtml or in the *Sierra WebHelp*.

- From the drop down list labeled Local, choose **Remote** button to launch Z39.50 searches of other library databases. All Sierra systems receive certain default servers which are solely examples of different types of server setups.

- Select one or more of the available databases from the list by clicking in the checkbox to the left of the appropriate server(s). Then click the **OK** button.

- The resulting summary display shows an **Origin** column to designate the source database from which the record was retrieved. The source also displays on the top blue information bar on the screen when a specific record is open in **View** or **Edit**.

- Open the record using the icon in the toolbar for **Edit** mode. This will provide the option to modify and save the retrieved record in the library database as appropriate. The record is not saved on the system until a save action is completed. Subsequent to the save action, the Bibliographic record is saved and a new Bibliographic record number is assigned by the system. If it is not appropriate to save the retrieved record, click on the **Close** icon on the toolbar. Closing without saving will not save the record in the library database.

  - Invalid fields which may initially appear in the color blue subsequent to download are not saved to the library database. An invalid field is a field which is not specified in the Z39.50 load profile for the library system. Fields which are invalid (are not specified in the Z39.50 load table) will not be saved in the record. These fields are initially displayed in blue (unless your library has configured another color to use for invalid fields in **Edit |Preferences | Editor**).

  - It is possible to overlay an existing record with an imported record using the dropdown menu **Edit | Overlay**. *Before* the new record is saved, use the dropdown menu **Edit |Overlay** to search for the match. The system proposes a list of Bibliographic records which are open and also proposes the option "Find Bib". It is also possible to select "Automatic" choice. See the *Sierra WebHelp* for details on overlay and automatic match points. The **Overlay** command on the toolbar defaults to the "Find Bib" option and not the "Automatic" option.

- Use the **Local** button to return to searching the local catalog database. Always remember to change back to Local if no additional records are being searched on a remote database.

Load Batch Files of Records Using Data Exchange

In this function, it is possible to prepare and load files of records, check files before they are loaded, and view error logs. Optionally, it is also possible to export files.

- Using this option requires that any necessary batch load table and process is moved to the preferred section in **Admin |Options |Data Exchange** tab. The preferred process(es) are moved from the right hand side to the left-hand side using the arrow icons. Moving from left to right uses the other arrow icon.

- This function facilitates the importing of a file residing on the hard drive of a client workstation without the necessity of using the ftp process

- It is possible, also, to export a prepared file existing on the Sierra server directly to a file on the client workstation (for example to send a file of MARC records for authority control processing at an outside vendor).

- It is possible to create a review file (for informational purposes) of records which are loaded into the system via the Data Exchange function.

Copying Records

- Open the appropriate record, and then select **Edit | Copy record** from the dropdown menu.

- Edit the newly copied record and click on the **Save** icon.

- Note: When the user copies a record, whether or not a particular field is populated from the template or from the original record is controlled by internal Sierra settings. These settings also specify the submenu options that appear when the user copies an Authority record. To change these settings from default settings, contact your Implementation team or the Innovative Help Desk.

Edit Bibliographic records

- The Sierra record editor enables you to maintain records. Record maintenance includes editing, copying, sorting, and deleting records, as well as other tasks.
- You can maintain most record types from any Sierra function, so long as you are assigned the necessary permissions.

- When the brief Bibliographic record is displayed, choose the **Edit** icon on the toolbar. In multi-window mode, the record opens in a separate window.

Modifying Fixed-Length Fields

Sierra enables you to edit the following types of fixed-length fields:

- Fields validated against the Fixed-length Codes file

- Fields validated against fields in other records

- Date fields

- Monetary amount fields

- LOCATION and FUND fields

- COPIES fields

- Other fixed-length fields

Modifying Variable-length Fields

When editing records, its variable-length fields appear in a table beneath its fixed-length fields.
- To edit a variable-length field, choose the field to edit and then click in the field.
- Edit the field as needed.

Editing Special Variable-length Fields

- Special fields of MARC21, including 006, 007, 008 or UNIMARC 100 can be expanded for editing. Position the cursor anywhere in the special field to expand. Then use <Ctrl>-R, or **Edit | Expand field**, or right mouse click and choose **Expand field**.   The display will present each part of the field individually.

- Insert or change values as desired. Close the special fields using the right mouse key and selecting the **Collapse field** choice**,** or using <Ctrl>-R. This will close the special field to the compact form.

Moving (re-ordering) variable length fields

- Variable-length fields within the same field group can be re-ordered so that selected fields will appear before other fields in the WebPAC display. This is applicable if the MARC field group tag is identical for the group of fields.

- Select a particular MARC field to move, and using the right mouse menu, choose "Move to bottom of group", "Move to top of group", "Move down", or "Move up". The appropriate action will result in a repositioning of the fields in the record display. When the record is saved, the fields will be saved in the desired order. This is only applicable if the field group tags are the same, regardless of the MARC tag numbers of the fields.

- The system always maintains the variable-length field groups in an individual record in library-selected order if they have been moved and saved.

Insert variable length fields

- Press the **Insert** icon in the toolbar. Alternatively, type <Ctrl>-I, to perform the insert function. Then choose the correct field group tag for the field to be inserted. Insert or correct the MARC tag and indicators as necessary, and type in the data desired for the variable-length field.

- If the field group tag is known, or if the exact MARC tag and indicator desired are known, it is possible to press <Enter> from anywhere in the record and type in data as described above when presented with the "?".

Delete variable length fields

- It is possible to delete an entire field by positioning the cursor in the field to be deleted with a single click of the mouse, and then press <Ctrl>-D;

- Alternatively, it is possible to highlight an entire field. Then use the dropdown menu **Edit | Delete field.**

- It is also possible to position the cursor in the field to be deleted, and then click the right mouse key. Select "Delete Field" from the right mouse menu and click on that. Alternatively use the **<Delete>** key; or use the **Backspace** key to backspace over and delete selected characters in the field.

- Use <Ctrl>-Z or **Edit | Undo** from the dropdown menu to replace up to 10 delete operations. There is also an **Edit |Redo** choice in the dropdown menu once **Edit | Undo** has been selected. These are both applicable up to 10 actions. This option is not available if the record has already been saved.

Insert diacritics

- To insert a diacritic character using the Character Map, place the cursor at the position to insert the necessary diacritic character. Then use the dropdown menu **Tools | Character Map**. (The Code Chart can be changed from here). The appropriate code chart may also be selected to display in the dropdown menu **Tools | Character Map.** Select the appropriate Code Chart which may be desired to display by default when the Character Map is used.

- With the character map open, and the cursor in the position where the diacritic is desired, double click on the selected box representing the diacritic character in the character map. Alternatively, select the box by clicking once and choose the **Insert** button. Either of these actions will insert the selected diacritic in the cursor position in the record.

Validating MARC Tag Information

- All invalid MARC tags show in the color which has been specified by the library for invalid fields in the preferences for the login.

- Explanations of MARC tag, subfield, and indicator rules are available by using the dropdown menu **Tools | MARC Tag Info**. This displays MARC tag explanations and indicator and subfield options. NOTE: the file can be searched using the **Search** icon once the MARC Tag Info table is open.

- To check information about a selected MARC tag, position the cursor on the field in the Bibliographic record for which information is needed. Then, right mouse click, and choose **MARC Tag Info.** The system will display the explanation of the selected MARC field.

- If the field is not a valid MARC field, the system displays the MARC tag which seems to be the closest match to the MARC tag in question. To correct the MARC tag to match the displayed

rule, highlight the correct tag or indicator, and click on **Correct** in the window. Multiple indicators can be corrected before closing the window.

- If invalid subfield codes exist, the **correct** button corrects only the first subfield code, even if there are multiple invalid codes in the field. Pay close attention to the appropriate subfield code to be corrected.

Verifying record headings

- To verify all record headings in the record, choose **Verify** from the toolbar or **Tools | Verify Record Headings** from the dropdown menu, or use <Ctrl>-H. This report displays the status of indexed headings, and displays whether headings are new or variants by presenting codes to the left of each field which is appropriate for verification.

- To see an explanation of the verification codes subsequent to verifying record headings, use the dropdown menu **Tools | Explain Verification Codes.** This presents a table with a description of the meanings of all of the headings verification codes.

- To verify a single heading in a particular Bibliographic record, which also presents the possibility to correct it, position the cursor anywhere in the headings field. Choose **Tools | Verify Heading** from the dropdown menu, or right mouse click and choose **Verify Heading**, or use <Ctrl>-G. This opens a search window:

  > A matching Authority record is highlighted if it exists.
  > The highlighted heading can be selected, or there is an option to perform a new search.
  > It is possible to replace the heading with an existing heading, or choose to view the record in which the proposed heading exists. There is an option to select the preferred heading at that point or to cancel the operation

Using Multiple Windows

- Multiple windows enable you to compare records side by side and to move quickly from one open record to another. They also enable you to easily copy data from one record to another.

- In addition to the main application window, a maximum of five records can be open at one time. Each record opens in a new window.

- To enable the opening of multiple windows, choose Admin | Settings | Windows | Multi Windows Mode.

Show public view of records

- Use the dropdown menu **View | Public display** to launch a web browser and to view any open record as it will display in Encore or the WebPAC.

- It is possible to view the public display whether the record is saved or not saved. A message appears for records which are not saved prior to viewing the public display.

- The text of the message which is displayed is set in the WWW Option : MILCAT_PUB_VIEW

Viewing Bibliographic Record History

Sierra can track up to five changes to bibliographic records and the login name under which the changes were made. The changes tracked are made by staff using: Editor, Data Exchange, Global Update, URL Checker, Media Management and Rapid Update.

Deleting Records

To delete a Bibliographic or Authority record, do the following:

- Retrieve the record you want to delete using any index desired, and choose the **Edit** icon on the toolbar.
- If the search retrieves a browse list, select the appropriate record in the list by highlighting it and clicking on the **Select** button. Then select the **Edit** icon on the toolbar. The record must be in the "edit" mode in order to delete it.
- Choose **File | Delete <record type> Record** from the dropdown menu.
- Sierra prompts **Delete <RECORDTYPE> record <record number>?** Choose **Yes** to delete the record, or choose **No** to cancel the deletion and return to the Edit Record window.
- If the Bibliographic record to be deleted has records attached, Sierra prompts **Delete <RECORD TYPE> record <record number> and all attached records?** Choose **Yes** to delete all records, or choose **No** to cancel the deletion and return to the Edit Record window.

Creating and Editing Item records

- If automatic Item creation when downloading from the bibliographic utility is not done, Item records may be created from the **Summary** button below the Bibliographic record.

- After searching for and selecting the Bibliographic record, select the **Summary** tab by clicking on it. Click on the **View** drop down menu. Select the " i " **Item** line from the dropdown menu and then click on the button **Attach New Item**

- Select **Attach New Item** and the system will ask the user to select an appropriate template or the user is prompted immediately to use a pre-selected template and the Item record creation can begin immediately. This is dependent on the new record template settings for the user's account.

- If "*Use wizard to create new records*" has been selected, the "wizard" will guide the user through the creation of the new Item record

- If the "*Use wizard to create new records*" option has not been selected, the user will need to create the Item record manually, selecting appropriate fields to insert individually.

Printing Monographic Labels

You can print monographic labels in the edit display or summary display of items records. They may be printed using a label printer or using print templates.

You can use the following methods to print monographic labels:

- Printing Monographic Labels Using a Label Printer

- Printing Monographic Labels Using Print Templates

- Batch Printing Monographic Labels Using Print Templates

Modify groups of attached records from the Summary display

- Select or highlight from the summary tab the records to be modified by clicking the check boxes to the left of the entry. Then select **Edit | Modify group** from the dropdown display.

- Select the field to modify by field tag, individual field number, or the "down arrow" key on the keyboard to display all of the available fields to modify. Select the appropriate field by using the <Enter> key.

- Double click to select a new value to insert, or use the dropdown menu **Edit | Find | Find what | Replace with** to find and replace a specified value in a group of records.

- Use **Edit | Increment data** from the dropdown menu to numerically increment VOLUME, COPY #, and BARCODE fields

Transfer attached records from one Bibliographic record to another

- Open the source Bibliographic record and from the **Summary** tab, mark the checkbox of the record or records which should be transferred. Then choose **Edit | Transfer attached** from the dropdown menu. It is also possible to begin this process when an attached record is in the edit mode.

- Search for the destination Bibliographic record when presented with the "Find Bib" option. Open the appropriate record and select the **Use bib** button.

- With multiple windows, it is possible to open the destination Bibliographic record first. Then it is directly selectable (by Bibliographic record number) from the **Edit | Transfer attached** dropdown menu option.

- If the Multi Window mode is enabled in **Admin | Settings | Windows**, it is possible to open both the source and the destination Bibliographic records simultaneously, and to select the Bibliographic record to transfer to using the **Edit | Transfer attached** dropdown menu.

- After the attached record has been transferred to another Bibliographic record, the system may present the option to delete the source Bibliographic record if there are no other records of any type attached to the Bibliographic record.

Link Items to additional Bibliographic records

- After opening a Bibliographic record, select from the **Summary** tab the Item record to be linked to another Bibliographic record. Alternatively, click on the summary line to open the Item record

- Choose **Edit | Link to additional bib** from the dropdown menu.

- Search for and select the additional Bibliographic record (destination Bibliographic record) to which the Item should be linked.

- This is appropriate in the instance of two bibliographic entities bound into one single volume (for which there is one single piece).

Sort Item records by location, call number, volume

- After opening a Bibliographic record, select all (or appropriate) Item records from the **Summary** tab by clicking in the checkbox. Select **Edit | Location/call no./volume sort** from the dropdown menu.

- This option sorts records alphabetically by location name, by call number, and then by volume in the volume field of the Item record.

- To preserve this sort for WebPAC display, use the dropdown menu **Edit | Preserve sort.** If the sort is not preserved, the rearrangement will not be retained for display in the WebPAC. It will revert to the original order in the list.

Importing order information

- This option is used to import information from the system-created variable field "paid field" in an Order record to store in the Item record fixed field "price" when deleting an Order record. Select **Edit | Import order information** from the dropdown menu.

Creating Authority records

- Use the dropdown menu **File | New record | Authority record**

- Choose an appropriate new Authority record template. It is possible to specify default preferred templates by consulting **Admin | Settings | New records** in the dropdown menu to specify a template or the choice of templates which will be offered as preferred templates if desired.

- Type data in the appropriate fixed and variable-length fields for Authority records following the template prompts (if you are using the "wizard"). If records are to be created without using the "wizard", type data directly into the Authority record manually. More details on creating a record without using a template may be found in the above section "Creating and Editing Records in Sierra".

Editing Authority records

- Search the database, selecting the appropriate index to retrieve the Authority record

- To edit fixed length fields, double click in the white area to receive the table of valid values and click on the selected value to modify the field. Alternatively, a double-click in a fixed-length field will present all of the available options. When using this method, click on the desired field value to insert it into the record.

- To edit Variable length fields, click on the **Insert** button, or insert variable length fields by using <Ctrl>-I, or press <Enter> and type the appropriate field group tag of the field to insert, followed by the desired data in the field.

Copying Authority records

When copying an authority record, you can save the new record as a title authority, a subject authority, or an author authority. Choose the type of authority from the submenu under the **Edit |Copy Record** menu option. Your choices are:

Copy as TITLE Authority
Copy as SUBJECT Authority
Copy as AUTHOR Authority

Deleting Records

To delete an attached record (or any other type of record) do the following:

- Retrieve the Bibliographic associated with the record you want to delete.
- Click on the **Summary** tab and select the record type from the **View** drop-down list.
- Select the desired record and click on the **Delete** button.
- If an Item record is deleted which is linked to other Bibliographic record(s) Sierra displays a dialog box, asking if you want to delete these links. Choose **Yes** to delete the link(s) to the other Bibliographic records(s).

- Item records may not be deleted if there is any link to a Patron record (Examples: the Item is checked out; the Item is billed; or the Item has holds on it). All links of all types must be removed from an attached record before the system will permit deletion.

Deleting Records in Batch

- This function can only be used with a previously created review file of records.

- This function is password-protected since it permits deletion of large numbers of records at one time. The authorization must be associated with the user initials and password in order to perform this action.

- Select a review file of records by clicking on the list and selecting from the dropdown menu of choices. After selecting (by name), the file of records to be deleted, click on the **Start** button.

- Specify whether or not attached records are to be deleted by selecting one of the two options displayed in the middle of the screen. Select the appropriate option by clicking in the button to the left of the option.

- After selecting the options discussed above pertinent to record deletion, click on the **Delete records** button. Pay close attention to the warning message, as the action cannot be stopped once is started.

- Review the process report supplied by the system after the deletion process regarding records which were not deleted (for example: records in use by the system). Consult the listed records to correct the problem as defined by the system.

- With this delete action, the records will be completely deleted from the database.

Session statistics

- Use the dropdown menu **Reports | Session Statistics** to show user statistics for the current session or to calculate cumulative statistics on demand. This option is controlled in the **Admin | Settings | Session Statistics** from the dropdown menu.