

Sierra Reports and Statistics

This workshop provides an overview of the reports and statistics that are most important for the system coordinator to monitor and manage. The course includes discussions of how to identify bad data and areas requiring cleanup.

This agenda is flexible and subject to change. Underlined topics below are hyperlinks to the Sierra WebHelp (<http://csdirect.iii.com/sierrahelp>) and other resources on CSDirect. 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.

Letters in parentheses refer to the Admin Corner menu path. Please note that menu paths may vary on your system.

Introduction

- Introduction of trainer and trainees

Creating Lists (Review Files)

- General principles
 - Reasons for creating a review file
 - Importance of good data
 - Importance of understanding record structure
- Create Lists settings
- Create Lists system options
 - Create BOOLEAN lists: password review files
 - Create BOOLEAN lists: scope during range
 - Create BOOLEAN lists: use template files
- Working with review files
- Using Boolean searching
 - Specifying special field search criteria for:
 - Bibliographic, item, and patron records
 - Holdings records
 - Invoice records
 - Order records
- Working with records listed in a review file
- Saving searches
- Working with saved search templates

Workshop Agenda

Using Statistics

- Statistics settings
- Grouping call numbers for statistical reports
 - Call numbers, SCAT tables, and statistical reports on call numbers
- Managing queries
- Creating and editing queries
- Managing results
- Creating reports

Decision Center

- Evaluation Reports
- Development Reports
- Balancing Reports
- Maintenance

Web Management Reports

- Using the Web Management Reports spreadsheet interface
 - http://<your_sierra_server>/iii/webprt
- Using the Web Management Reports web browser interface
 - http://<your_sierra_server>/manage

Sierra Direct SQL Access (discussion)

- Getting started
- SierraDNA
 - <http://techdocs.iii.com/sierradna>
- Query examples
- Troubleshooting

Resources

- CSDirect
- Sierra Knowledge Base
- Sierra Web Help

Please feel free to evaluate your workshop experience by filling out the Workshop Survey form at http://csdirect.iii.com/contact/feedback_workshop.php

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