Sierra Updates & Advanced Techniques

MUG, September 8th, 2016

Marmot Library Network – User Services Team

Lloyd Chittenden, Brandon Cole, Tammy Poquette

Create Lists – JSON to Replace Use Existing Search (Lloyd)

○ We need to redo searches in Create Lists all the time
  ○ You need to rerun a search on different locations or dates
  ○ You need to rerun it because it didn't work right
○ The process to recreate a search in Sierra is ponderous
○ JSON allows a faster method

You don't want to type all this again

Use Existing Search is a pain

Boolean Search

Review File Name: MARMOT more wierd call numbers

Store Record Type: BIBLIOGRAPHIC b

Range | Start: b10000008 | Stop: b51169459

○ Classic ○ Enhanced ○ JSON

Term	Operator		Type	Field	Condition	Value A	Value B	
1								

Group
Ungroup
Insert Line
Append Line
Delete
Clear All

Search | Use Existing Search | Retrieve Saved Query | Save | Save As | Close

Use Existing Search

Select the list and click Show Info

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File   Edit   View   Go   Tools   Reports   Admin   Help

sierra

FUNCTION Create Lists

Append   Dedupe   Copy   Empty   Rename   Own   Release   Cancel

Review Files

- Review Files
- Saved Searches
- Saved Sorts
- Saved Lists
- Saved Exports

Review Files

All ▼ | Search Records | Sort Records | List Records | Import Records | Export Records | Show Records | Show Info |

Show Info

File	Name	Current Records	Max Records	Type	Status	Login ▼	d [date/time]
77	Pitkin Withdrawals	1	7500	i	complete	mac	03-07-2016 / 16:27'00
343	headrpt mac Tue Aug 09 13:22:07 MDT 2016	8	500	b	complete	mac	08-09-2016 / 13:22'08
216	Pitkin MR REF-Loc change	257	1000	i	complete	mac	05-24-2016 / 11:46'21
283	MARMOT more wierd call numbers	158	500	i	complete	lloyd	08-18-2016 / 14:36'13
82	CMU 019 dups	2373	7500	b	complete	lloyd	08-15-2016 / 17:00'05
333	Marmot Globes	252	500	b	complete	lloyd	08-05-2016 / 11:23'54
484	More dups	59	100	b	complete	lloyd	08-12-2016 / 14:41'36
117	Marmot call k	2504	3000	i	complete	lloyd	05-31-2016 / 16:03'45
14	CMU springer	58702	100000	b	complete	lloyd	08-10-2016 / 09:25'06
327	MARMO sky	15	500	b	complete	lloyd	06-14-2016 / 08:53'49
58	Marmot 019 dub search	5974	10000	b	complete	lloyd	07-26-2016 / 11:13'57
286	WS doc dups	396	500	b	complete	lloyd	06-13-2016 / 13:35'16

Click the JSON radio button

Ctrl-a to select the JSON
Ctrl-c to copy it

MARMOT more wierd call numbers

Store Record Type: ITEM i

Range

Start: i10000008   Stop: i103848940

○ Classic   ○ Enhanced   ● JSON

```
          "type": "item"
        },
        "field": {
          "tag": "c"
        }
      },
      "expr": {
        "op": "regex",
        "operands": [
          "^[^0][^9][^9]",
          ""
        ]
      }
    }
  ]
}
```

OK

Close the Show Info box

MARMOT more wierd call numbers

Store Record Type: ITEM i

Range | Start | i10000008 | Stop | i103848940

○ Classic ○ Enhanced ● JSON

      "type": "item"
    },
    "field": {
      "tag": "c"
    }
  },
  "expr": {
   "op": "regex",
   "operands": [
    "^[^0][^9][^9]",
    ""
   ]
  }
 }
 }
 ]
}

OK

OK
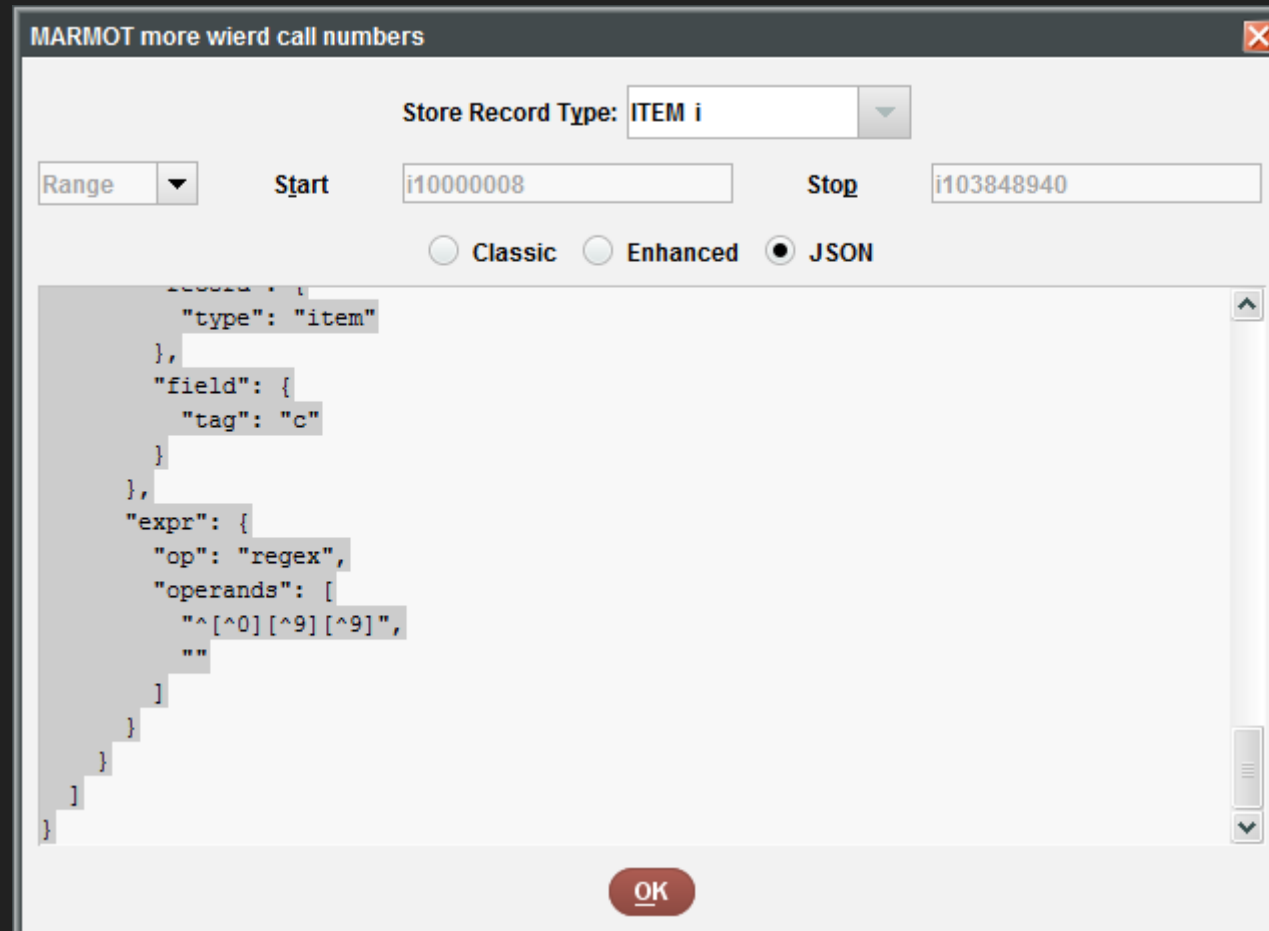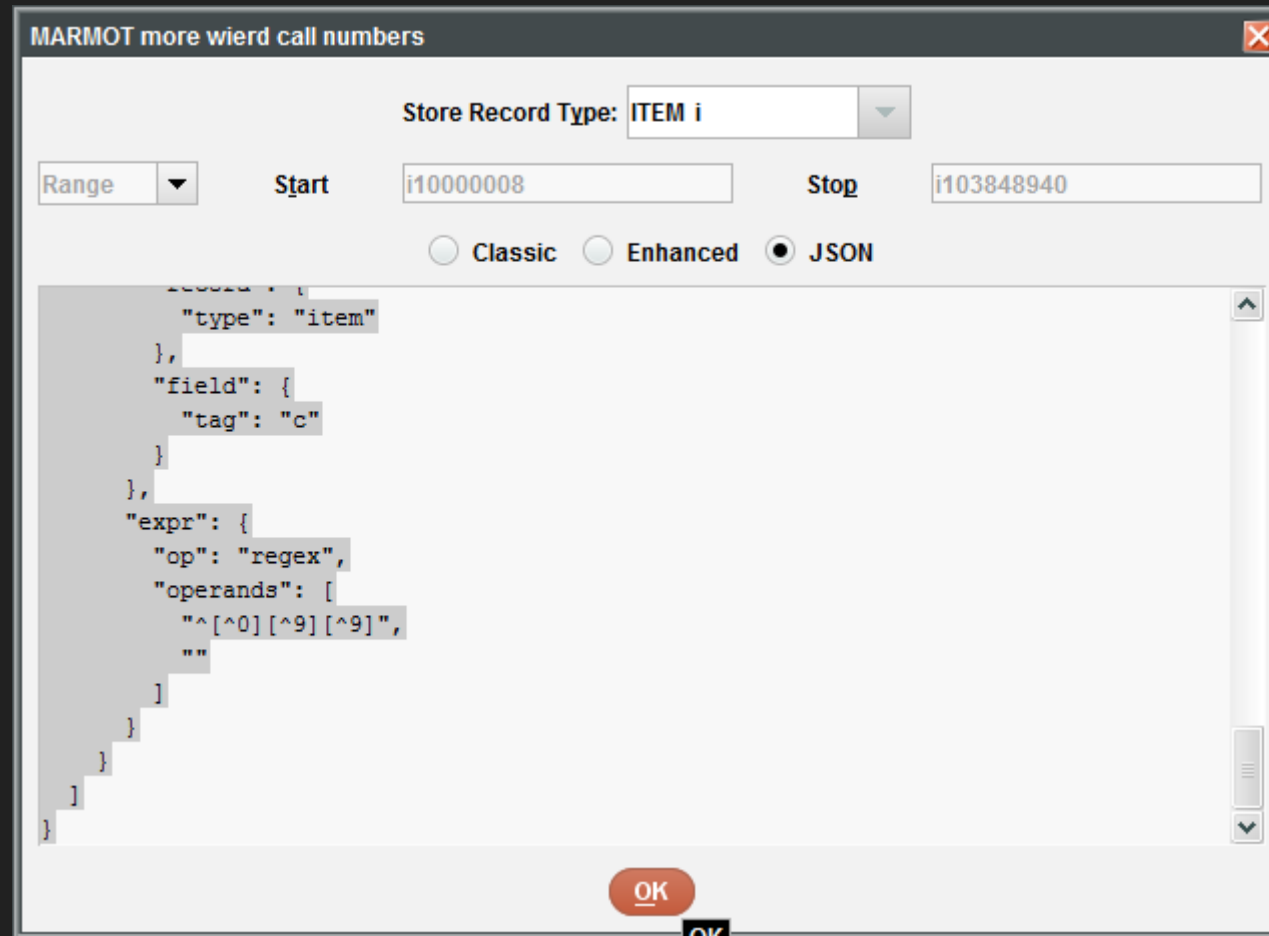
Select the list and click Search Records

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File   Edit   View   Go   Tools   Reports   Admin   Help

sierra

FUNCTION   Create Lists

Append   Dedupe   Copy   Empty   Rename   Own   Release   Cancel

Review Files

Saved Searches

Saved Sorts

Saved Lists

Saved Exports

Review Files

All | Search Records | Sort Records | List Records | Import Records | Export Records | Show Records | Show Info |

Search Records

File	Name	Current Records	Max Records	Type	Status	Login ▼	Created [date/time]
77	Pitkin Withdrawals	1	7500	i	complete	mac	03-07-2016 / 16:27'00
343	headrpt mac Tue Aug 09 13:22:07 MDT 2016	8	500	b	complete	mac	08-09-2016 / 13:22'08
216	Pitkin MR REF-Loc change	257	1000	i	complete	mac	05-24-2016 / 11:46'21
283	MARMOT more wierd call numbers	158	500	i	complete	lloyd	08-18-2016 / 14:36'13
82	CMU 019 dups	2373	7500	b	complete	lloyd	08-15-2016 / 17:00'05
333	Marmot Globes	252	500	b	complete	lloyd	08-05-2016 / 11:23'54
484	More dups	59	100	b	complete	lloyd	08-12-2016 / 14:41'36
117	Marmot call k	2504	3000	i	complete	lloyd	05-31-2016 / 16:03'45
14	CMU springer	58702	100000	b	complete	lloyd	08-10-2016 / 09:25'06
327	MARMO sky	15	500	b	complete	lloyd	06-14-2016 / 08:53'49
58	Marmot 019 dub search	5974	10000	b	complete	lloyd	07-26-2016 / 11:13'57
286	WS doc dups	396	500	b	complete	lloyd	06-13-2016 / 13:35'16

You could also redo the search in a different bucket

Change record type if necessary

Boolean Search

Review File Name: MARMOT more wierd call numbers

Store Record Type: BIBLIOGRAPHIC b

BIBLIOGRAPHIC b
ORDER o
CHECKIN c
CHECKIN AND CARD cc
AUTHORITY a
ITEM i
PATRON p
COURSE r
INVOICE n

Range   Start   b10000008   b51169472

○ Classic ○

Term	Operator		Type	Field		Value B	
1							

Group
Ungroup
Insert Line
Append Line
Delete
Clear All

Search   Use Existing Search   Retrieve Saved Query   Save   Save As   Close

Click the JSON radio button

Delete the {}

Paste in the JSON

Boolean Search ✕

Revie_w_ File Name: MARMOT more wierd call numbers

Store Record Type: ITEM i ▼

Range ▼   S_t_art   i10000008   Stop   i103851264

○ Classic   ○ Enhanced   ● JSON

```
und ,
  {
    "target": {
      "record": {
        "type": "item"
      },
      "field": {
        "tag": "c"
      }
    },
    "expr": {
      "op": "regex",
      "operands": [
        "^[^0][^9][^9]",
        ""
      ]
    }
  }
]
}
```

Search   Use Existing Search   Retrieve Saved Query   Sa_v_e JSON   Load _J_SON   _C_lose

Go back to Classic view

This also allows you to cancel a search

○ Sometimes you realize you made an error in a search and you want to cancel it

○ However, canceling means you can't get the search back with Use Existing Search

○ You can get the JSON, then cancel the search and paste it back

You start a search and realize you made a mistake

Click Show Info and copy the JSON

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File   Edit   View   Go   Tools   Reports   Admin   Window   Help

sierra   **FUNCTION** | Create Lists

Append   Dedupe   Copy   Empty   Rename   Own   Release   Cancel

Review Files

Saved Searches

Saved Sorts

Saved Lists

Saved Exports

Review Files

| All | Search Records | Sort Records | List Records | Import Records | Export Records | **Show Records** | **Show Info** |

File	Name	Current Records	Max Records	Type	Status	Login ▲	Created [date/time]
484	More dups	59	100	b	complete	lloyd	~~08-12-2016~~ / 14:41'36
288	Marmot prefix dups	159	500	b	complete	lloyd	08-08-2016 / 14:15'11
58	Marmot 019 dub search	5974	10000	b	complete	lloyd	07-26-2016 / 11:13'57
373	Marmot weird locations lhc	0	100	i	in progress	lloyd	08-19-2016 / 13:27'18
229	Marmot archive	9	1000	b	complete	lloyd	07-19-2016 / 14:37'58
279	bad indicator	144	500	b	complete	lloyd	08-18-2016 / 10:30'50
70	Marmot Bad barcodes	7500	7500	b	complete	lloyd	08-17-2016 / 08:50'44
355	Audiobooks	58	100	b	complete	lloyd	06-17-2016 / 10:07'37
294	test	500	500	i	complete	lloyd	07-22-2016 / 11:19'53
38	Marmot 019 dub items	14592	20000	i	complete	lloyd	07-26-2016 / 11:15'26
71	marmot billed stuff	4134	7500	i	complete	lloyd	07-15-2016 / 14:42'06
82	CMU 019 dups	2373	7500	b	complete	lloyd	08-15-2016 / 17:00'05

Click Cancel

Start a new search and paste in the JSON

Create Lists – JSON to Add a List of Barcodes to a Revie File (Tammy)

Notepad++

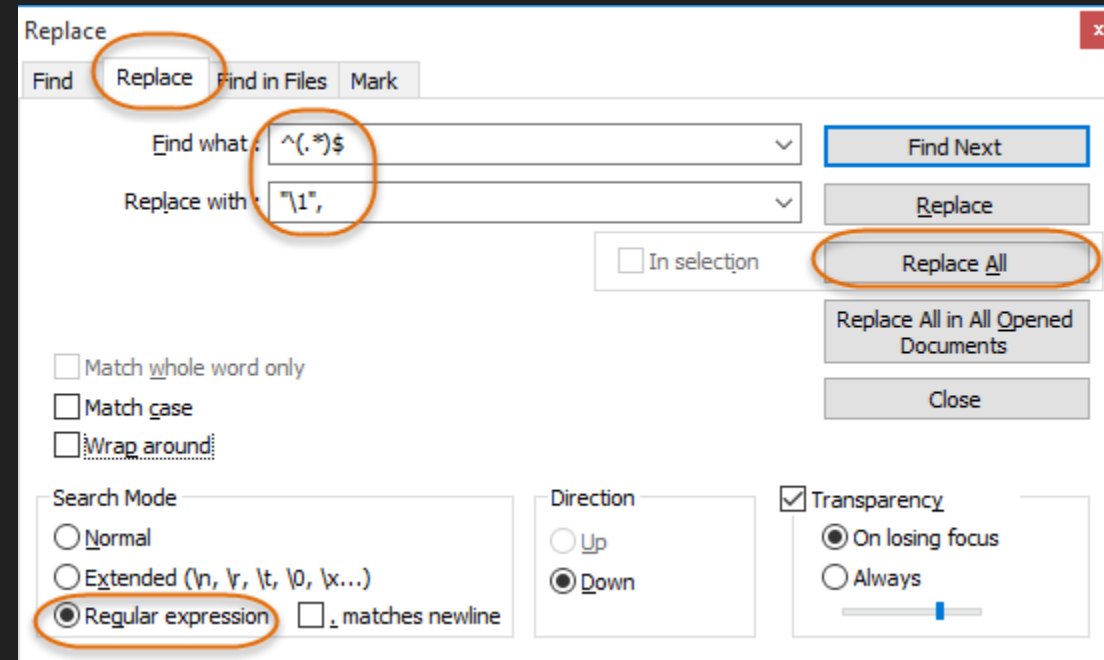Here are the steps to scan barcodes into Notepad++, and add the needed formatting to work using JSON.

•Scan your barcodes into Notepad++.
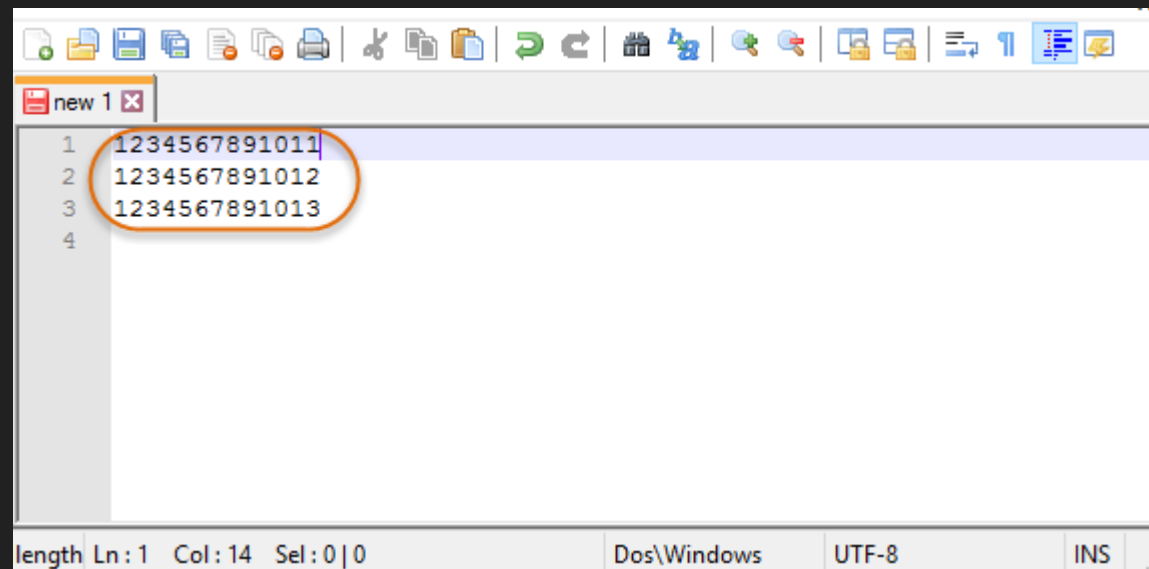
Create Lists – JSON to Add a List of Barcodes to a Revie File

Press Ctlr F. This will bring up the Replace Box.

    a.   Click on Regular expression

    b.   Click Replace

    c.   Find what: ^(.*)$

    d.   Replace with: "\1",

    e.   Click Replace All

Create Lists – JSON to Add a List of Barcodes to a Revie File

You should get a message at the bottom of the screen letting you know the amount of items that were replaced

Replace All: 3 occurrences were replaced.

You need to do a little cleanup with the barcodes. You will need to remove the , at the end of the last barcode.
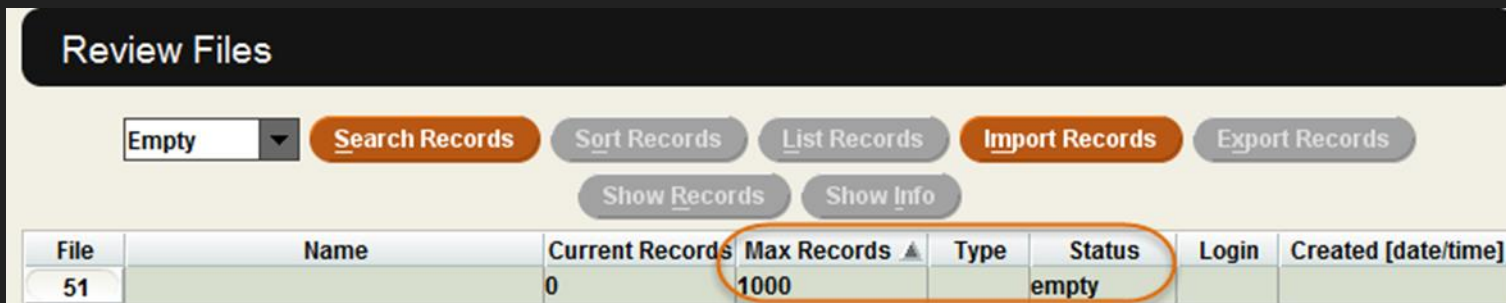
"1234567891011",
"1234567891012",
"1234567891013",

Create Lists – JSON to Add a List of Barcodes to a Revie File

Create Lists in Sierra
Find an empty review file that has the Max Records that will hold all your scanned barcodes from Notepad++.

Click on "Search Records" to open the review file.

Create Lists – JSON to Add a List of Barcodes to a Revie File

Change the Store Record Type value to the type of record that your barcodes matches (usually item or patron records). Change search type from default Classic to JSON. Remove any text in the query box (usually just a pair of curly braces, '{ }').

Create Lists – JSON to Add a List of Barcodes to a Revie File

Paste the formula below into review file for the JSON query using Ctrl V. Make sure to include your formatted barcodes.

This formula is for item records. For patron records (or other records that have indexed barcodes), change the line "type": "item" and change it to "patron" or whatever record type is appropriate.
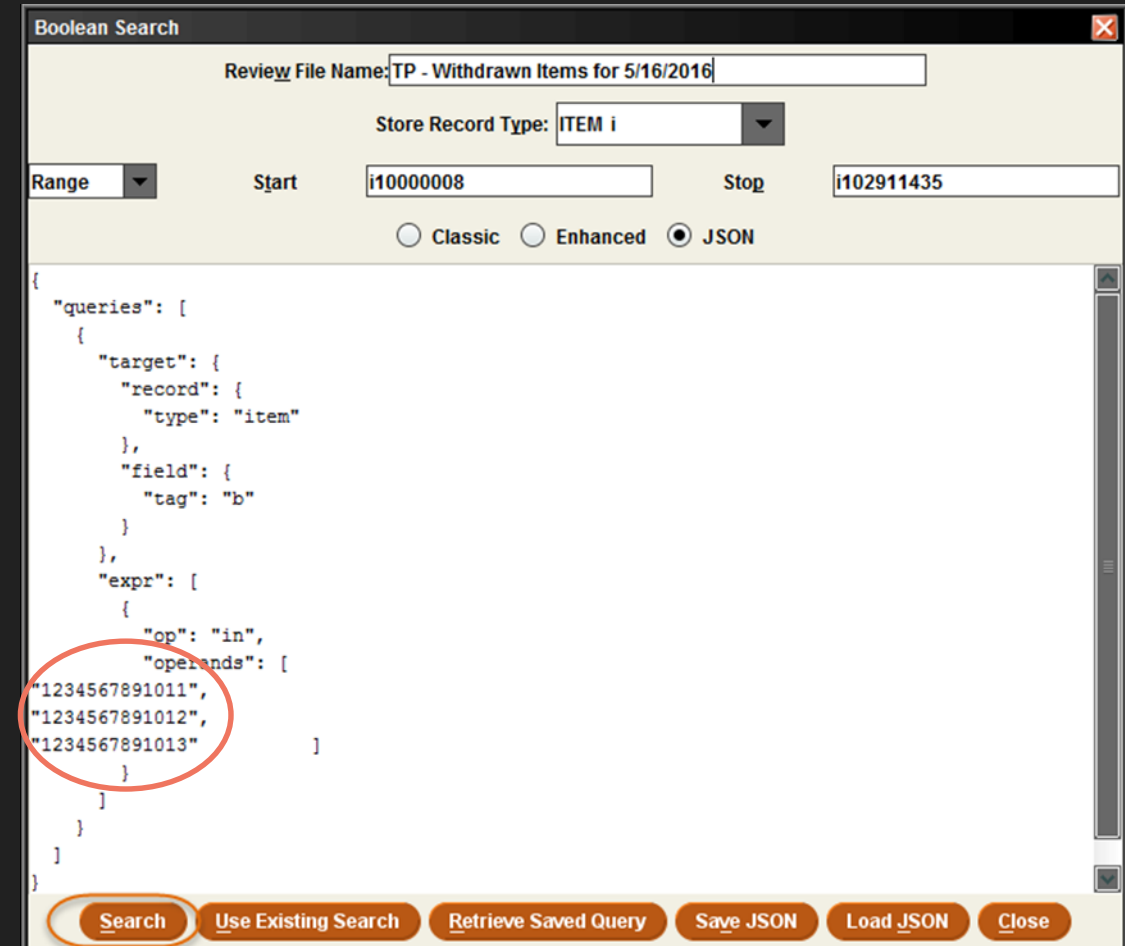
```
{
  "queries": [
    {
      "target": {
        "record": {
          "type": "item"
        },
        "field": {
          "tag": "b"
        }
      },
      "expr": [
        {
          "op": "in",
          "operands": [
            "0538502117517",
            "0538513096387",
            "0538513096395",
            "0538505744416",
            "0538512175315"
          ]
        }
      ]
    }
  ]
}
```

Create Lists – JSON to Add a List of Barcodes to a Revie File

You will need to copy and paste (Ctrl V) the barcodes from Notepad++ into the review file.

Here is what your JSON query will look like. Click Search.

Note: Any items that are no longer in the catalog will not show up in this search. This could be one of the reasons why the number of barcodes in the review file are less then the number of the scanned barcodes.

Create Lists – JSON to Add a List of Barcodes to a Revie File

Possible problems

Bad Data in your query:
If you see the Unterminated array error, you may have a stray character in your query that is tripping up Create Lists.

```
"0538502117517",
"0538505744416",7 <-------Stray character "7"
"0538512175315"
```

Create Lists – JSON to Add a List of Barcodes to a Revie File

Bad Data in your records:
If you barcode data is stored in patron and item records with inconsistent formatting or extra whitespaces, punctuation, etc., you might have trouble finding a given record. For example, if three of your item records have the following three barcodes (not including quotation marks) …
"0538 50211 7517"
"0538513096387 "
"0538513096395."

And your JSON query has these three barcode character strings …
"0538502117517",
"0538513096387",
"0538513096395",

None of the three barcodes would be found by create lists using the basic JSON query. It might be best to remove this extra spaces using Global Updates. Contact Marmot, if you need assistance with this type of Global Update.

Create Lists – JSON to Add a List of Barcodes to a Revie File

Deleted Items

- Items deleted after they are scanned it into Notepad++ will not show up in the review file.

- You will not get an error message.

- It might be best to keep a record of your scanned items, and compare it to the barcodes in the review.

Structured Query Language (SQL) for special-purpose reporting in Sierra (Brandon)

What does SQL have to do with Sierra?

1. The Sierra database is structured into a PostgresSQL relational Database

1. This database captures material, circulation, patron, financial and other data

1. Using an application to connect to this database we can get access to this raw data
    a. Often times has information that you can't get out of Create lists, Statistics, or Decision Center
    b. Queries can be copied and reused

Some Jargon

SQL
- Structured Query Language
- Allows Management of PostgresSQL Database

Schema
- Collections of views

Views
- Collections of data columns

Columns
- Fields for the data (i.e. record numbers, barcodes, ect.)

The Application

pgAdmin

- Allows you to connect and see the schemas, views, and columns in the Sierra postgres database

- Easy familiar interface

- Can be used on Mac, Windows, and Linux

- Graphical Query Builder
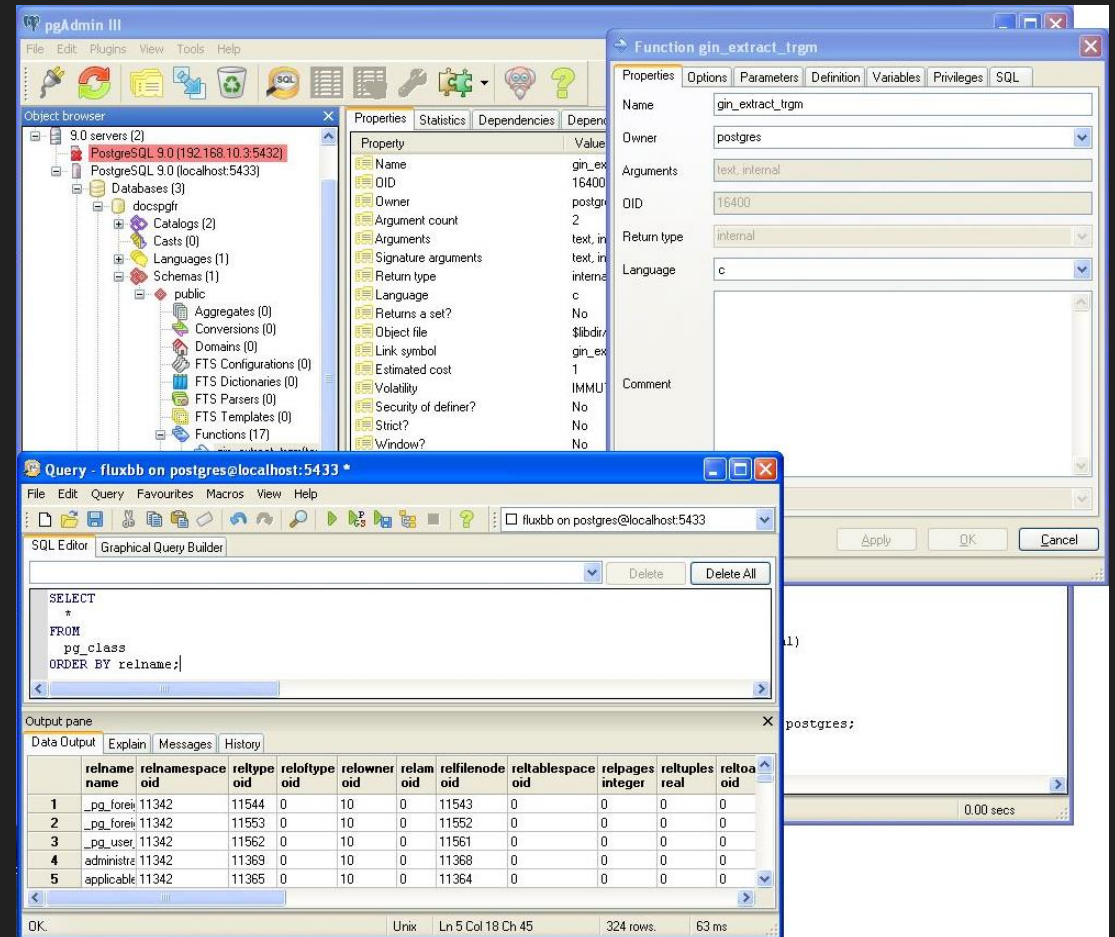
What can you get with SQL?

Circulation

- Patrons opted into Reading history
- Patrons with Frozen holds older than (x) days
- Number of items checked out from category limits (A,B,C, & D)
- Bibs with more than (x) holds

Cataloging

- Bibs with creation date (x) with at least one attached item with creation date (y)
- i-type counts
- Items linked to more than one bib

Admin

- Permissions Assigned to a Sierra Login
- Logins assigned to a user group pool
- Logins assigned to a stat group
- All Logins assigned to a Library served

An Example

Patrons Opted into Reading History at Mesa County

```
SELECT
  patron_view.barcode,
  patron_view.home_library_code,
  patron_view.is_reading_history_opt_in,
  patron_view.patron_agency_code_num
FROM
  sierra_view.patron_view
WHERE
  patron_view.patron_agency_code_num = 125 AND
  patron_view.is_reading_history_opt_in IS NOT NULL ;
```
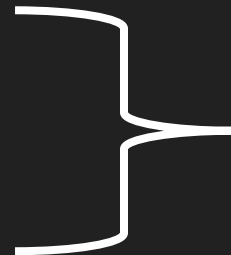
Columns

View

Query Params

Continued Example

○ Screenshot shows the results you can export these results as a .csv and open in excel to format and order the data however you want

User Services Contact Information

Lloyd Chittenden - lloyd@marmot.org

Brandon Cole - brandon@marmot.org

Tammy Poquette - tammy@marmot.org