Sierra Updates & Advanced Techniques

MUG, September 8th, 2016
Marmot Library Network – User Services Team
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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
Select the list and click Show Info.
Click the JSON radio button
Ctrl-a to select the JSON
Ctrl-c to copy it
Close the Show Info box
Select the list and click Search Records
You could also redo the search in a different bucket
Change record type if necessary
Click the JSON radio button
Paste in the JSON
Boolean Search

Review File Name: MARMOT more word call numbers

Store Record Type: ITEM i

Range  Start | Stop
--------|--------
       | 10000008 | 1003851264

<table>
<thead>
<tr>
<th>Term</th>
<th>Operator</th>
<th>Type</th>
<th>Classic</th>
<th>Condition</th>
<th>Value A</th>
<th>Value B</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>ITEM</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>AND</td>
<td>ITEM</td>
<td>CALL #</td>
<td>matches</td>
<td>*[0-9][0-9][0-9]</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>AND</td>
<td>ITEM</td>
<td>CALL #</td>
<td>matches</td>
<td>*[9][4][9]</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>AND</td>
<td>ITEM</td>
<td>CALL #</td>
<td>matches</td>
<td>*[9][9][2]</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>AND</td>
<td>ITEM</td>
<td>CALL #</td>
<td>matches</td>
<td>*[0][9][9]</td>
<td></td>
</tr>
</tbody>
</table>

ITEM CALL # matches "^[0-9][0-9][0-9]" AND ITEM CALL # matches "^[9][4][9]" AND ITEM CALL # matches "^[9][9][2]" AND ITEM CALL # matches "^[9][9][9]" AND ITEM CALL # matches "^[0][9][9]"
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
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 Ctrl 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 Review 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 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 Review 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 Review 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.
Create Lists – JSON to Add a List of Barcodes to a Review 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 than the number of the scanned barcodes.
Create Lists – JSON to Add a List of Barcodes to a Review 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"
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 Review File

Deleted Items

• Items deleted after they are scanned 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 PostgreSQL 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, etc.)
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

```sql
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;
```
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

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