Educational Technology and Library Services

Sierra Procedures Manual

A library operations guide for DPS Library Media Specialists, Library Techs, and Library Paraprofessionals.
Sierra Procedures Manual (At–A–Glance)

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Last Updated: August 31, 2015
Version 2.2.2
Overdue, Lost Items and Fines

Renewing Items

Check In

Check Out Error Messages

Check Out Error Messages

Renewing Items

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Item .ixxxxxxx has too many renewals.

Item belongs at location xxx, print transit slip?

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How to Use the Manual

Requirements
In order to use the Library Manual and have search functionality, you must have the following installed on your computer:

- Internet Explorer (ver. 7 or higher) or Mozilla Firefox (ver. 3.6 or higher)
- Adobe Reader (ver. 9.0 or higher)

Note: You can view the manual with older versions of these products, but you may not see some of the advanced search functions, or the pages may not display properly.

Navigating the Manual

Table of Contents
The Table of Contents is a listing of the manual's contents organized by a specific topic. Each entry includes the chapter's subject and page number. Click on a link to go directly to that topic in the manual.

Bookmarks
Bookmarks are a set of links created by Adobe using the manual's table of contents. Click on a link to navigate directly to that topic in the manual.
**Keyboard Shortcuts**

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</tr>
<tr>
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<td>View previous page or screen.</td>
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<td>PAGE DOWN</td>
<td>View next page or screen.</td>
</tr>
<tr>
<td>END</td>
<td>Takes you to the last page of the manual.</td>
</tr>
<tr>
<td>RIGHT ARROW</td>
<td>View next page in manual.</td>
</tr>
<tr>
<td>LEFT ARROW</td>
<td>View previous page in manual.</td>
</tr>
<tr>
<td>UP ARROW</td>
<td>Scroll up through document.</td>
</tr>
<tr>
<td>DOWN ARROW</td>
<td>Scroll down through document.</td>
</tr>
<tr>
<td>CTRL+Equal sign</td>
<td>Increase magnification on page.</td>
</tr>
<tr>
<td>CTRL+Hyphen (-)</td>
<td>Decrease magnification on page.</td>
</tr>
</tbody>
</table>

**Searching the Manual**

**Find Toolbar**
This is a basic search that allows you to search for an occurrence of a word (or words) in the manual.

Using the Find Toolbar:

- Place the cursor in the Find textbox.
- Type the word you want to search for in the textbox.
- Hit the **ENTER** key.

After hitting the **ENTER** key, the cursor will jump to and highlight each occurrence of the word in the manual. Hitting the **ENTER** key again will make the cursor jump to the next occurrence of the word.
**Search Window**

A more advanced search that allows you to search for words or phrases within the manual. The search can be set to look for any occurrence of the word, or match any of the words in your search. Once the search completes, it will display all occurrences of the word in the manual.

Using the Search Window:

- Click the binoculars icon on the left of the bookmarks.
- Type in the word or phrase you want to search for in the manual.
- Choose how you want the results returned in your search. Your choices are; "**Match Exact word or phrase**" or "**Match any of the words**".
- Click the **SEARCH** button to start your search.
Your search results appear here. Click on a link to jump to that section in the manual.
What’s New? (Revisions)

- Withdrawn items now being suppressed in LION.
- Updated Jeff Stephens email address.
- Replaced Maggie Wolfe with Brandy Burdick as the discarded book contact.
- Added section on “Installing Sierra”.
- Updated Overdue Notices section.
- Added System Data Events schedule.
- Added “Changing Your Sierra Password” section.
- Added “Changing the Sierra Color Scheme” section.
- Added “Self-Checkout (Express Lane)” section.
I. Circulation

► Getting Started
  o Installing the Sierra Desktop App (SDA)
  o Launching the Sierra Desktop App (SDA)
  o Sierra Startup Issues
  o Changing Your Sierra Password
  o Changing the Sierra Color Scheme

► Checking Out
  o Retrieving a Patron Record
  o Checking Out an Item
  o Changing the Due Date
  o Viewing Checked Out Items
  o Finding the Last Patron that Checked Out an Item
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► Checking In
► Renewing Items
► Overdue, Lost Items, and Fines
  o Marking Items as Claim Returned
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► Overdue Reports and Notices
► Patron Records
  o How Student Records Are Loaded into Sierra
  o How Staff Records are Loaded into Sierra
  o Creating Patron Records in Sierra
► Holds (DPS Shares)
► Printing in Sierra
► Self-Checkout (Express Lane)
► Circulation Reports
Getting Started

Installing the Sierra Desktop App

Sierra is a licensed application provided by our vendor, Innovative Interfaces, Inc. Installation and use of the software can only be authorized by Library Services. **No other district tech departments are allowed to install Sierra without explicit consent from Library Services.** The Sierra Desktop application can be installed on both **PC** and **Mac** computers.

Note: Due to licensing restrictions on the system, Sierra can only be installed on a maximum of **two** computers in your library.

**PC:**
Instructions: [http://simba2/sierra/windows/Sierra_Install_Win.docx](http://simba2/sierra/windows/Sierra_Install_Win.docx)

**Mac:**
Instructions: [http://simba2/sierra/mac/Sierra_Install_Mac.docx](http://simba2/sierra/mac/Sierra_Install_Mac.docx)

If prompted, enter your network login and password to get access to the files. If you cannot get to the files, contact the Library Services Helpdesk.
Launching the Sierra Desktop Application (SDA)

1. Look for the **Sierra Desktop App** icon on your desktop after logging into your computer.

2. Double-click on the **Sierra Desktop App** icon to launch it.

3. After a few seconds, you will be prompted for a username and password. Enter the login credentials assigned to your school by Library Services.

   **Note:** If you do not know the login credentials for your school, please contact the Library Services Helpdesk @ 720.423.1842.

4. Click the **LOGIN** button **OR** hit the **ENTER** key.
   a. If you want the computer to remember your credentials check the “**Remember me on this computer**” checkbox.

5. After a few more seconds, you will see the main Sierra screen.
Sierra Startup Issues

“Incorrect username and password” message.
There may be a typing error or the username/password you entered is incorrect. Try re-typing both the username and password in lowercase to see if that fixes the problem. Also, Library Services changes the Sierra password every summer. Check your e-mail for the new password. If you still cannot login to Sierra, call the Library Services Helpdesk @ 720.423.1842.

Cannot find the Sierra icon on your Windows/Mac desktop.
Either the shortcut for Sierra has been deleted from the desktop or Sierra has not been installed on your computer. First, try looking in the Windows Recycle Bin or Mac Trash Bin to see if the Sierra shortcut is there. If so, drag it back to the desktop. In the event that Sierra has not been installed on your computer, try re-installing the software yourself or contact the Library Services Helpdesk for assistance.

“Could not connect to server.” message
Either the software cannot see the LION server on the network, or more than 10 minutes have elapsed between launching Sierra and entering your login/password. Check the network cable plugged into the back of your computer, and try again. If you are still getting the “could not connect” message, contact the Library Services Helpdesk.

You don’t see the login prompt after double-clicking on the Sierra icon.

- There may be a problem with the network connection on your computer. Try opening your browser and going to a non-district website. If you can’t get to those sites, there is either an issue with the connection to your computer, or your school/district may be having network problems. Contact Library Services to have us confirm where the problem may be occurring.

- The Sierra Desktop App may not have installed properly. Contact the Library Services Helpdesk for assistance.

Sierra doesn’t launch when I click the icon.

- See the previous answer.
Changing Your Sierra Password

All schools now have the ability to change the password for their school’s Sierra login. You will be required to make this change at the start of each school year, and you can change the password as frequently as you wish.

Here are the steps for changing your Sierra password:

1. Click “Admin” on the Sierra menu bar.

2. Click “Change Password.”

3. Type in your previous/old Sierra password in the dialog box.
4. Type in the new password you wish to use in the “New Password” section.
5. Re-type your new password in the “Retype New Password” section.
6. Click the OK button and your new password will go into effect.

If you have any issues with your new Sierra password, contact the Library Services Helpdesk.
Changing the Sierra Color Scheme

Sierra can be displayed using one of two color schemes, Half Dome or Glacier Point.

1. Half Dome

![Half Dome Image]

2. Glacier Point

![Glacier Point Image]

You can use either color scheme for your Sierra display. If you wish to change your scheme, here are the instructions for changing them:

1. While Sierra is open, click “Admin” on the menu bar.

![Admin Menu Image]

2. Click “Settings”
3. Click the “Display” tab in the box that opens.

4. Under the “Look And Feel” section, select the scheme you want from the Skin drop-down box.

5. Click the “Save Setting” button, then the “OK” button when you’re done.
6. Restart Sierra to see the new color scheme.
Checking Out

The following topics will be covered in this section:

- Patron Record Confidentiality
- Retrieving a Patron Record for Check Out
- Checking Out an Item
- Changing the Due Date during Check Out
- Viewing Items Checked Out To A Patron
- Check Out Error Messages

Checking Out Items (At–A–Glance)

- Launch Sierra and select “Checkout (Circulation Desk)” from the drop-down menu.
- Retrieve the patron’s record:
  - by scanning the patron’s library barcode.
  - by entering their lastname, firstname preceded by the letter “n”. (e.g. nDoe, John).
  - by entering their student ID number preceded by the letter “u” (e.g. u999999).
- Scan the barcode of all items being checked out.
  - Change the item due date if necessary.
- Close the patron record when finished.

Patron Record Confidentiality

All patron records are confidential. Do not share names, addresses, identification numbers, or telephone numbers with anyone for purposes other than the operation of the Library Media Center without exception! Please direct specific inquiries for confidential information to a school administrator or Human Resources as appropriate.
Retrieving a Patron Record for Check Out

Before checking out an item, you must retrieve the patron record in Sierra. You can bring up the patron’s record in the following ways:

- By scanning their library barcode using your barcode scanner.
- By searching for the student by name.
- By entering the student 6-digit ID number.

Searching For the patron by NAME:

1. Select **CHECK OUT (Circulation Desk)** from the **FUNCTION** drop-down menu.

2. In the textbox where it says “**Key or Scan Patron Barcode**”, type a lower-case “n” followed immediately by the patron’s name in the following format (**lastname firstname**).

3. Click the “Search” button.

If there is an exact match, the system will immediately bring up the patron’s record. In the case of multiple matches, Sierra will display a browse list of patrons with a similar spelling. Verify that the patron record is the one you want and select it by double-clicking on it.
Searching for the patron by their district ID NUMBER

1. Select **CHECK OUT (Circulation Desk)** from the **FUNCTION** drop-down menu.

2. In the textbox where it says **"Key or Scan Patron Barcode"**, type a lower-case "u" followed immediately by the student’s 6-digit ID number.

3. Click the **"Search"** button or hit the **ENTER** key to bring up the patron record.

**Note:** There should be no duplicate student ID numbers in the system. If you see one, please notify the Library Services Helpdesk.
Searching for Staff records

You can search for staff records by using the methods described above. The difference is that staff records have a **9-digit** employee ID number that comes from their Lawson record. If the patron does not know their employee ID number, we recommend searching the database by the employee’s name (i.e. *lastname, firstname*) rather than the ID number. Just verify that you have brought up the correct patron record before checking out to materials to them.

**For more details on patron records, please refer to the “Patron Records” section of this manual.**

Checking Out an Item

1. Select **CHECK OUT (Circulation Desk)** from the **FUNCTION** drop-down menu.

2. Bring up the patron record. (See “Retrieving a Patron Record for Check Out”)

3. Scan the item barcode(s). Continue scanning each of the item barcodes until you have checked out all the materials to the patron.

4. When done, click the **CLOSE** button to close the patron record.

Checking Out to a Patron Whose Record is expired:

If you check out a book to a student whose record has expired, and the checkout date exceeds the expiration date in their record, the Sierra will use the expiration date in the patron record as the due date for any checkouts to that student. For example: if the expiration date is September 30, 2014, and you check out a book whose loan period goes beyond that date, the system will assign September 30, 2014 for the checkout. Even if the loan period is longer than that. When this occurs, you can update the date in the patron record and re-check out the item to them.
Changing Due Dates During Check Out
Sierra will allow you to change the system-assigned due dates for an item during check out to a patron. This process can be done on a patron-by-patron basis.

To change the due date during check out:

1. After checking out an item to the patron, highlight the item in Sierra and click on the “Change Due Date” button.

2. After clicking the “Change Due Date” button, the system will present you with a calendar where you can select your desired due date. Select the new due date by clicking it on the calendar, then clicking the OK button.

If you want to apply the due to all of the items being checked out by the current patron, be sure to check the box “Use this date in the rest of check-outs for this patron”.

Changing the Due Date After Check Out

1. Bring up the patron’s record in Sierra.
2. Click on the Checked-Out Items tab.
3. Highlight the item you want to change the due date for.
4. On the calendar, select the new due date.
5. Click the OK button.

Viewing Items Checked Out To A Patron

1. Select CHECK OUT (Circulation Desk) from the FUNCTION drop-down menu.
2. Bring up the patron record in Sierra.
3. Once the patron record is displayed, click the “Checked Out Items” tab in Sierra to see all items currently checked out to the patron. This display will include overdue and billed items as well. The tab will display in red if there are any overdue items on the patron’s record.
Finding the Last Patron That Checked Out an Item

On occasion, you will want to find out who was the last patron to check out an item. Sierra keeps a history of the last patron who had the item. To view the last patron:

1. Select Search/Holds from the FUNCTION drop-down list.

2. Scan or type the barcode number of the item.

3. Click the Record tab to display the full item record.

4. Look for the Last Patron field in the item record.
5. If there is a number in this field, double-click on the Last Patron field to bring up the record of the last patron to check out this item. If the LPATRON field is zero, no patron previously checked out this item.
Check Out Error Messages

“You have not scanned in a borrower barcode yet.”
You scanned an item to checkout before bringing up the patron record. Retrieve the patron record and re–scan the item you wish to checkout to that patron.

“Barcode not in database.”
The barcode number does not currently exist in the LION database, or the barcode was misread by your barcode scanner. If the barcode number is not in the database, you will need to put the patron or item into the database manually (Refer to the Creating Patron Records or the Item Record Management section of this manual). If the barcode was misread, try rescanning it.

“Record .pxxxxxxx in use by system.”
The patron record is being used by another process on the system, or is being used by another user. The busy record will usually clear after a few seconds, but on occasion, they will have to be cleared manually by Library Services staff. Send the complete record number to the Library Services Helpdesk and they'll clear it for you.

“Record .ixxxxxxxx in use by system.”
The item record is in use by another process on the system, or another user has the record open. The busy record will usually clear after a few seconds, but on occasion, they will have to be cleared manually by Library Services staff. Send the complete record number to the Library Services Helpdesk and they will clear it for you.

“Borrower owes too much money.”
The fine amount the patron owes exceeds the current system limit of $1.00. This block can be overridden by you at your discretion.

“Borrower registration has expired.”
Today's date is later than the date in the expiration date field of the patron’s record. This should not be an issue with records loaded by Library Services as the expiration date is standard for all records (It is always Sept. 30th of the following school year). However, you can see this with manually created patron records. If this happens, edit the expiration date in the patron’s record to reflect the current date being used (i.e. 09–30–xx).
“Borrower has exceeded highest level overdue.”
The patron has exceeded the maximum number of overdue notices allowed to them. This message will usually appear once the patron has received the first level notice. You can override this block at your discretion.

“Item Already Checked Out.”
The item was checked out to another patron and was inadvertently placed back on the shelves. Clear the checkout and proceed. If the item was overdue, Sierra will automatically waive any resulting fines. If the item has been billed, Sierra will automatically clear the charge.

“This is not a valid index”
The barcode being scanned was misread by the scanner and not recognized by the system or you tried to bring up a patron record by name and it was not preceded by the letter “n”. Try re-scanning the barcode or re-typing the patron name with the letter “n” before it.
Check In

This section will cover the following topics:

- [Checking in Items](#)
- [Check In Messages](#)

### Checking In (At-A-Glance)

- Select Check-In (No Patron) from the FUNCTION drop-down menu
  - Backdate the Due Date if necessary.
- Scan or type the barcode of the returned item.
- Repeat until done.

### Checking In Items

Use this mode if you are clearing a book drop or returning items for a class and you don’t need to negotiate any fines. This mode does not require the patron to be present.

1. Select “Check-In (No Patron)” from the FUNCTION drop-down menu.

![FUNCTION Check-In (No Patron)](image)

2. Backdate the return date if necessary.

![Check-In Date](image)

3. Scan or type the barcode number of the materials you wish to return.
4. Continue scanning the returned materials until done.
Check In Messages

That item has already been scanned.
   The item barcode was previously scanned during your current session.

Item belongs at location xxx, print transit slip?
   This message appears when you check in an item that belongs to another school. If the item
does belong to your school, send the title and barcode of the item to the Library Services
Helpdesk and we’ll correct the location code. Print the transit slip if the item is a hold being
returned to the owning school.

Item status is MISSING, clear it?
   The item being checked in has a status of “Missing”. In this case a “claims returned” was
placed on the item by library staff. Click the “Yes” button to clear and change the status to
“Available”.

Item status is CLMS RET’D. Clear it?
   A “Claims Returned” has been placed on the item. Click the “Yes” button to clear the status
and make it “Available”. This will remove any claims returned notes from both the item and
patron records.

Items status is BILLED and has been cleared.
   The item being returned was billed by the system or declared lost by the patron. The “BILLED”
status is cleared upon check in and the charge is removed from the patron’s record if the
patron has not made any payment. If the patron has made any partial payment, the system
will check in the item and clear the “BILLED” status, however, it will not remove the remaining
charges on the patron’s record. This must be cleared manually.

Item is not checked out, checkin ignored.
   The item being returned was not checked out or was checked in previously.
Renewing Items

This section will cover the following topics:

- How due dates are calculated for renewed items
- Renewing items from the Patron’s Record
- Renewing items using the RENEW mode
- Renewal Error Messages

How due dates are calculated for renewed items

The due date for renewed items is calculated using the system-assigned loan rule applied to the item during its initial check out. For example, if the initial loan period assigned to the item was 2 weeks, the new due date will be 2 weeks from the date the item was renewed.

**NOTE:** Do not renew book sets from the Library Services Classroom Library! You should renew items from your collection only!

Renewing Items from the Patron’s Record

1. Retrieve the patron’s record in “Check Out (Circulation Desk)” mode in Sierra. (See “Retrieving a Patron Record for Check Out” for details.)
2. Click on the “Checked Out Items” tab.

3. Highlight the item or items that you wish to renew.
4. Click the “Renew” button to extend the loan period of the item.

5. You should see the following message:

You’ll also see that the item due date has been updated and the item status will now show “RENEWED”.
Renewing Items Using RENEW (No Patron) Mode
When you use the Renew (No Patron) mode in Sierra, the patron does not have to be present. As long as you have either the book or the item barcode number, you can renew the item using this mode.

1. Select “Renew (No Patron)” from the FUNCTION drop-down menu.

2. Scan the barcode of the item(s) you wish to renew.

3. Sierra will display a prompt asking you to confirm the renewal. Click the “Yes” button if you wish to proceed.

4. After responding positively to the prompt in the previous step, the item will be assigned a new due date.
**Renewal Error Messages**

**This is not a valid index for the current mode.**

The barcode you are trying to scan is not recognized as an item barcode. Try re-scanning the item barcode.

**Item .ixxxxxxxx does not circulate.**

The system could not find a circulating loan rule to apply to the item. This can be due to errors in ITYPE, LOCATION, or PTYPE codes. Examine the item record to make sure all the codes are correct for your location.

**Item .ixxxxxxxx cannot be renewed by this patron.**

The item is a reference item that was loaned to patron for one day. Reference items cannot be renewed.

**Item .ixxxxxxxx is in use by the system.**

The item record is being used by another process or user. Wait a few seconds for the record to clear. If it doesn’t, make note of the record number and send it to the Library Services Helpdesk to be cleared manually.

**Item .ixxxxxxxx cannot be renewed.**

Items that have a status of “Claims Returned” or “Missing” cannot be renewed.

**Item .ixxxxxxxx has too many renewals.**

The item you are renewing has exceeded the maximum number of renewals allowed by the system. You can work around this issue by checking in the item and re-checking it out to the patron.
Overdue, Lost Items and Fines

Topics covered in this section:

- Overdue Charges
- Marking Items as Claim Returned
- Marking Items As Lost
- Creating a Manual Charge
- Paying or Waiving Overdue and Lost Charges
- Making Partial Payments
- Viewing a Patron’s History of Fines Paid

**Overdue Charges**

If your school charges fines, the daily fine amount is 5 cents per day. There is a 3-day grace period for returning overdue items. However, if the overdue item is returned within 3 days of the due date, the overdue fines are automatically waived by the system. If the item is returned after the 3-day grace period, the daily fine amount will be applied to the item, including the 3 grace period days, until the item has been returned or the item has reached “Billed” status. In which case, the patron will be charged the replacement price listed in the item record or the system–default replacement fee of $20.00 if no price is listed.

**Note:** There is no grace period for schools that do not charge fines. All of your items are considered overdue one day after their due date.

**Do you have to charge the patron the full replacement fee?**

No, you may charge the patron whatever you feel is appropriate. A $20.00 charge is the default fee applied to long overdue items if there is no price listed in the item record. Modifying the fine amounts will be covered in the “Paying or Waiving Overdue and Lost Charges” section.

**Fine/Charges Summary**

- Daily Fine: ................................................................. 5 cents
- Replacement/Lost Charge: .............................................. Price listed in item record or $20.00
- Replacement/Lost Charge (Periodicals): ...................... $5.00
- Replacement Charge (Reference Items): ................. $100.00
**Marking Items as Claim Returned**

When a patron disputes whether an item has been returned and the item is not on the shelf, you can mark the disputed item as Claim Returned. When a Claim Returned has been placed on an item, the system will give you the following options:

- Check in the item and change the item status to “Missing”.
- Check in the item and change the item status to “Claims Returned”.
- Leave the items checked out and change status to “Claims Returned”.

**Marking an Item as Claim Returned with MISSING Status**

This option will allow you to mark the item as “Claims Returned” and change the item status to “MISSING”. The item will be checked in from the patron’s record and the patron will not receive overdue notices or bills for the item.

1. Select “Check Out (Circulation Desk)” from the FUNCTION drop-down menu.
2. Bring up the patron record.
3. Click on the “Checked-Out” Items tab.

4. Select the item you wish to mark as Claim Returned by clicking on them.

5. Click the “Claim Returned” button.

6. Select the date the patron claims the item was returned on the calendar, then click the “OK” button.
7. Select the “Check in items (with no fines) and change status to MISSING” option.

8. After selecting this option, the system will give you a message verifying that the item has been marked as “Claimed Returned”. Click the “OK” button.

9. After clicking “OK”, the item will be cleared from the patron’s record and the item status will be changed to “Missing”.

Example of changes made to the PATRON record after a Claim Returned:

```
EXP DATE: 09-30-2013
LANGUAGE: ENGLISH
GRADE: FIFTH
SCHOOL CODE: 11B ETLS
PATRON TYPE: Staff
TOTAL CHECKOUT: 4
TOTAL RENEWALS: 3
CUR CHECKOUT: 0
CUR RENEWAL: 0

Simpson, Bartholomew J
742 Evergreen Terrace
Springfield

LIBRARIAN CREATED RECORD.
Tue Jul 30 2013: Claimed returned 20086288 on Mon Jul 01 2013
```
Example of changes made to the item record after a Claim Returned:

![Image of item record]

Marking an Item as Claim Returned With CLAIMS RETURNED Status

This option will allow you to mark the item as “Claims Returned” and change the item status to “CLMS RETD”. The item will be checked in from the patron’s record and the patron will not receive overdue notices or bills for the item.

1. Select “Check Out (Circulation Desk)” from the FUNCTION drop-down menu.
2. Bring up the patron record.
3. Click on the “Checked-Out” Items tab.
4. Select the item you wish to mark as Claim Returned.
5. Click the “Claim Returned” button.
6. On the calendar, select the date the patron claims the item was returned, and then click the “OK” button.
7. Select “Check in items (with no fines) and change status to CLAIMS RTRND”.

![Image of change item status]

Last Updated: August 31, 2015
Version 2.2.2
8. After selecting this option, the system will give you a message verifying that the item has been marked as “Claimed Returned”. Click the “OK” button.

![Image of a message box with the text: The item was claimed returned. Click OK.]

9. After clicking “OK”, the item will be cleared from the patron’s record and the item status will be changed to “CLMS RETD”.

**Example of the item record after the item has been marked Claim Returned with Claims Returned status:**

![Image of a record showing the item status as “CLMS RETD”.]
Marking an Item as Claim Returned and Keeping Items Checked Out to Patron

This option will allow you to mark an item as “Claims Returned” and change the item status to “CLMS RETD” while keeping the item checked out to the patron. The patron will continue to receive overdue notices and bills for the item.

1. Select “Check Out (Circulation Desk)” from the FUNCTION drop-down menu.
2. Bring up the patron record.
3. Click on the Checked-Out Items tab.
4. Select the item you wish to mark as “Claim Returned” by clicking on it.
5. Click the “Claim Returned” button.
6. On the calendar, select the date the patron claims the item was returned, then click the “OK” button.
7. Select “Leave items checked out (send overdue notices) and change status to CLAIMS RTRND”.

8. After selecting this option, the system will display a message verifying that the item has been marked as “Claimed Returned”. Click the “OK” button.

9. After confirming the item was Claims Returned, you’ll see that it remains checked out to the patron, the item status has been changed to “CLMS RETD”, and that a Claims Returned note has been added to the item record.
Marking Items as LOST
You can use Sierra to mark an item as LOST when a patron reports that they have misplaced an item that is currently checked out to them, or when you wish to check in a long overdue item but retain the item’s billed status. Topics covered in this section are:

- Adding a Bill to the Patron’s Record
- Adding and Modifying the Bill Amount for the Lost Items

Adding a Bill to the Patron’s Record
This option will allow you to add a replacement charge to the patron’s record, check in the item, change the item status to “BILLED”, and add a lost note to the item record. The patron will automatically be billed for the item’s default replacement charge (in most cases this will be $20.00).

1. Switch to Check Out (Circulation Desk) mode in Sierra.
2. Bring up the patron’s record.
3. Click on the “Checked Out” items tab.
4. Select the item you wish to mark as “LOST”.
5. Click the “Mark Lost Items” button.
6. Click the “Add Bills” button.

![Image of Check Out and Mark Lost Items buttons]
7. After clicking the “Add Bills” button, the item will be checked in and the bill will be added to the patron’s record. The lost item record will have “BILLED” in the status field. Click the “Fines” tab to see the charges.
Adding and Modifying the Bill Amount for the Lost Items

This option will allow you to modify the amount of the bill being charged to the patron before it is added to their record. Once you have modified the charge, the system will check in the item from the patron’s record, change the item’s status to “BILLED”, and add a note to the item record.

1. Switch to Checkout (Circulation Desk) mode in Sierra.
2. Bring up the patron’s record.
3. Click on the “Checked Out” items tab.
4. Select the item you wish to mark as “Lost”.
5. Click the “Mark Lost Items” button.

6. In the dialog box that appears, click the “Update Bill” button.
7. Type in the amount you wish to charge the patron for the item. The replacement charge will either be the price in the item record or the system default charge of $20.00. You may change this to any amount you feel is appropriate for the item at your discretion. Ignore the processing and billing fee sections. Click the “OK” button when done.

8. Verify the bill amount you are charging the patron. Click the “Add Bills” button.

9. Click on the “Fines” tab to see the bill added to the patron’s record.
**Creating a Manual Charge**

Sierra will allow you to create a “librarian created” charge and add it to a patron’s record. This charge is not created by the LION system.

To add a manual charge to a patron’s record:

1. Switch to “Check Out (Circulation Desk)” mode in Sierra.

2. Bring up the patron’s record.
3. Click on the “Fines” tab.
4. Click the “Add Charge” button.
5. In the Add Charge window, ignore the “Predefined” option. Under the “Details” section, type in the amount of the charge and the reason for it. Do not change the LOCATION code.
6. Click the “OK” button when done.
7. Next, you’ll see the manual charge applied to the patron’s fines record.
Paying or Waiving Overdue and Lost Charges

Paying Fines or Charges

1. Change function to “Check Out (Circulation Desk)”.

![FUNCTION: Check Out (Circulation Desk)](image)

2. Bring up the patron’s record.
3. Click on the "Fines" tab.

![Fines tab in Sierra](image)

4. Select the item the patron wishes to pay for. When done, click the “Collect Money” button.

![Collect Money dialog box](image)

5. In the “Collect Money” dialog box, click the “OK” button to accept the full payment, or if the patron is making a partial payment, enter the amount to be paid.

![Amount to Collect dialog box](image)

6. Next, Sierra will display the receipt and give you the option of printing it for the patron. Click the “Print” button if you wish to print the receipt. If not, click the “OK” button.
7. After completing the payment, Sierra will remove the item from the patron’s record, and change the status in the item record from “BILLED” to “LOST AND PAID”.

![Image of item status window showing "LOST AND PAID"]

### Making Partial Payments

1. Refer to steps 1–4 in the “Paying Fines or Charges” section.
2. In the “Collect Money” dialog box put in the amount of the payment. Then click the “OK” button.

![Image of Collect Money dialog box with amount $5.00]

3. Sierra will then ask if you wish to “Waive remaining fines?” Click the “No” button when you are accepting a partial payment. This will keep a charge on the patron’s record but subtract the amount paid from the total owed for the item.

![Image of Waive remaining fines dialog box with options Yes and No]

4. Next, Sierra will display the receipt and give you the option of printing it for the patron. Click the “Print” button if you wish to print the receipt. If not, click the “OK” button.
5. After accepting the payment, Sierra will update the information in the patron’s fine record to show the payment and the remaining amount owed. It will change the status in the fine record for the item to “**Remaining Lost**”.

The system will keep the status as “**BILLED**” and add a note to the item record reflecting the payment made by the patron.
Waiving Charges

If you decide to completely waive the charges on a patron’s record:

1. Follow steps 1–3 in the “Paying and Waiving Charges” section.
2. Next, select the charges you wish to waive on the patron’s record. Click the “Waive Charges” button.

   ![Waive Charges Button]

   Total: $9.00  Amount selected: $4.00

3. Sierra will then ask if you wish to “Waive selected fines?” Click the “Yes” button.

   ![Waive selected fines?]

4. Next, Sierra will display the receipt and give you the option of printing it for the patron. Click the “Print” button if you wish to print the receipt. If not, click the “OK” button.

After waiving the charges, Sierra will remove the charge from the patron’s record and update the status in the item record to “LOST AND PAID”. No note will be added to the item record to denote the waived charges.

![Item Status]

**LOCATION** 253  **Westerly Creek**
**LOANRULE** 0
**Item Status** $LOST AND PAID
**INTL USE** 0
**COPY USE** 0
Viewing a Patron’s History of Fines Paid

In Sierra, you can view the fine history for a patron by using the Fines Paid button. Whenever the patron pays a fine or bill on their record, a history of the charge paid is kept in the Fines Paid archive. Please be aware that due to space limitations, the LION system cannot store a patron’s fine history indefinitely. Earlier fines are removed automatically by the system to make room for newer entries. To view the Fines Paid by a patron:

1. Change function to “Check Out (CIRCULATION DESK)”.

2. Bring up the patron record.
3. Click the Fines tab.
4. Click the Fines Paid button.

5. Next, you’ll see the Fines Paid archive for the patron.

6. To view the details of a particular charge, select the item and click the View Fine button. This will display all the details for that particular charge. To print the information, click the Print button at the bottom of the screen.
### Fines Paid

**Payments Made By SIMPSON, HOMER J. (Total Paid = $100.00)**

<table>
<thead>
<tr>
<th>Invoice</th>
<th>Charge Type</th>
<th>Description</th>
<th>Amount Due</th>
<th>Amount Paid</th>
<th>Date Paid</th>
</tr>
</thead>
<tbody>
<tr>
<td>387677</td>
<td>Lost Book</td>
<td>Pippi goes on ...</td>
<td>$20.00</td>
<td>$0.00</td>
<td>09-10-2008</td>
</tr>
<tr>
<td>474521</td>
<td>Lost Book</td>
<td>Pippi goes on ...</td>
<td>$10.00</td>
<td>$0.00</td>
<td>09-10-2008</td>
</tr>
<tr>
<td>474524</td>
<td>Manual Charge</td>
<td>water damage</td>
<td>$3.00</td>
<td>$3.00</td>
<td>09-10-2008</td>
</tr>
<tr>
<td>474521</td>
<td>Lost Book</td>
<td>Pippi goes on ...</td>
<td>$20.00</td>
<td>$20.00</td>
<td>09-10-2008</td>
</tr>
<tr>
<td>474521</td>
<td>Lost Book</td>
<td>Pippi goes on ...</td>
<td>$20.00</td>
<td>$20.00</td>
<td>09-10-2008</td>
</tr>
<tr>
<td>584040</td>
<td>Lost Book</td>
<td>Broadway / Re.</td>
<td>$20.00</td>
<td>$20.00</td>
<td>05-24-2009</td>
</tr>
<tr>
<td>584041</td>
<td>Lost Book</td>
<td>The ghost sh...</td>
<td>$20.00</td>
<td>$20.00</td>
<td>05-24-2009</td>
</tr>
<tr>
<td>584042</td>
<td>Lost Book</td>
<td>The California</td>
<td>$20.00</td>
<td>$20.00</td>
<td>05-24-2009</td>
</tr>
<tr>
<td>584043</td>
<td>Lost Book</td>
<td>Lizzie's list / Ma...</td>
<td>$20.00</td>
<td>$6.00</td>
<td>06-24-2009</td>
</tr>
<tr>
<td>584043</td>
<td>Lost Book</td>
<td>Lizzie's list / Ma...</td>
<td>$15.00</td>
<td>$5.00</td>
<td>06-24-2009</td>
</tr>
<tr>
<td>584041</td>
<td>Lost Book</td>
<td>The ghost sh...</td>
<td>$15.00</td>
<td>$0.00</td>
<td>06-24-2009</td>
</tr>
</tbody>
</table>

### Paid Fine Detail

**Payments Made By SIMPSON, HOMER J.**

**Invoice:** 584043  
**Charge Type:** Lost Book  
**Call Number:** Lizzie's list / Maggie Harrison; illustrated by Bethan Matthews.  
**Author:**  
**Barcode:**  
**Description:** Lizzie's list / Maggie Harrison; illustrated by Bethan Matthews.  
**Charge Location:** 256  
**Statistics Group:** 256  
**Checkout Date:** 06-24-2009  
**Due Date:** 07-08-2009  
**Assessed Date:** 06-24-2009  
**Date Paid:** 06-24-2009  
**Payment Status:** Partial Payment  
**Login:** cbs

#### Balance

- **Item Charge:** $20.00  
- **Processing Fee:** $0.00  
- **Billing Fee:** $0.00  

**Total:** $20.00  
**Previous Paid:** -$0.00  
**Amount Paid:** -$5.00  
**Amount Due:** $15.00
Overdue Reports and Notices

Topics covered in this section:

- What is the Overdues Report?
- Accessing the Overdues Report.
- Overdues Report for All Classrooms.
- Overdues Report for a single Classroom.

What is the Overdues Report?
The Overdues Report is a summary of all students and staff, currently registered at your school, that have overdue items. The report will include items may have been borrowed from a different school. You can print the report for your entire school or for a specific classroom.

Note: In order for a classroom to appear on this report, at least one student in the classroom must have an overdue item on their record. Otherwise, the classroom will not appear on the report.

The Overdues Report is a static report, which means that changes to the patron and item records do not appear until after the nightly update of the report is run on the system. For example, if a patron returns an item the same date as the current report, the item will not be removed from the report until after the nightly update.

Note: A “real-time” overdue items report is available on your Librarian Dashboard.

Accessing the Overdues Report
To access the Overdues Report in Sierra:

1. Select the function “Prepare Overdues Report”.

FUNCTION Prepare Overdues Report

2. If an Overdue Report has not been created since the previous day, you’ll see the following screen. If you do, be sure to click the “Create New Report” button to receive the latest data from the system.
Note: Do not click the “Use Current Report” button, as it will give you, and all your colleagues, the report data from the previous day, which is old data. Furthermore, the option to create a new report will not be available again until the next day, after the nightly report update has run.

3. After clicking the “Create New Report” button, the system will begin generating the new report. This can take a several minutes. Once done, you will see the following screen;

![Image of report generation screen]

At this point, you are now ready to print the reports for your school or classroom.
Selecting the Overdues Report for All Classrooms
To select the Overdues Report for all the classrooms with overdue materials at your school:

1. Select your school from the HOME LIBR drop-down box.
2. Leave the CLASS ROOM setting as “ALL”.
3. Click the Prepare Reports button.

Selecting the Overdues Report for a Single Classroom
To view the overdue report for a specific classroom:

1. After selecting your school from the HOME LIBR drop-down list, select the classroom you wish to view from the CLASS ROOM drop-down list.
2. Click the Prepare Reports button.
3. Below is the screen you’ll see after clicking the Prepare Reports button:

![Screen capture showing a list of books in a classroom.

4. To print the report for this classroom, click the **Print** button in the upper-right corner of Sierra.

![Screen capture showing the Print button highlighted.]}
Overdue Notices

Topics covered in this section:

- What are Overdue Notices?
- Notice Delivery Schedule
- How Notices are Delivered
- Notice Levels

What are Overdue Notices?
Overdue notices are reminders sent to patrons to inform them that their checked out items are overdue. The overdue items are always from your collection, but the patron may be from a different school.

Notice Delivery Schedule
Overdue notices are automatically generated and sent by the system every Monday, Wednesday, and Friday morning.

How Notices Are Delivered
Once the notices are prepared by the system, they are either sent to your Librarian Dashboard or delivered directly to the patron Sierra e-mail if they have a valid e-mail address in their patron record (see below).

E-mail Delivery of Notices
If the patron has a valid e-mail address in their record, the notice will be sent directly to them. E-mail addresses are not included in the student records we receive from Infinite Campus, but they are included in the staff records. Any patron may request e-mail notification service by logging into My LION and modifying their personal information to include their e-mail address.

Notice Levels
Borrowers may be sent up to three notices per item depending on the loan rule used at the time of check out:

First Level Notices
First level notices are the first notice a patron receives after an item becomes overdue. The notice is generated by the system 1 day after the item due date.
Example of First Level Notice:

27137199999996
Eric Cartman
Mr. Garrison
South Park Elementary

10-17-06

Denver Public Schools
Oakland Elementary
Library Media Center

Owning school.

Patron info.

Notice date.

************** FIRST NOTICE! **************
The item(s) listed below are OVERDUE. Please return promptly!
You may be charged a fine until the item(s) are returned.
If you think this notice is in error, please see your librarian.
DO NOT REPLY VIA E-MAIL TO THIS NOTICE. CHECK WITH YOUR LIBRARIAN!

Los materiales anotados abajo son VENCIDOS.
Por favor devuélvalos a la biblioteca lo más pronto posible.
Si cree que este aviso es un error, por favor póngase en contacto con su biblioteca.

AUTHOR: Brown, Marc Tolon.
TITLE: Arthur Babysits
CALL NO: E 986
BARCODE: 37137025971109
Oakland DUE: 10-07-00

Overdue item.

Second Level Notices
Second level notices are the second notice a patron receives for an overdue item. This notice is generated **5 days after the first notice has been sent**.

Example of Second Level Notice:

27137199999996
Eric Cartman
Mr. Garrison
South Park Elementary

10-17-06

Denver Public Schools
Oakland Elementary
Library Media Center

************** SECOND NOTICE! **************
The item(s) listed below are VERY OVERDUE! PLEASE RETURN THEM!
You may be charged a fine until the item(s) are returned.
If you think this notice is in error, please see your librarian.
DO NOT REPLY VIA E-MAIL TO THIS NOTICE. CHECK WITH YOUR LIBRARIAN!

Los recursos anotados abajo son MUY VENCIDOS.
Por favor devuélvalos MANANA a la biblioteca.
Si cree que este aviso es un error, por favor póngase en contacto con su biblioteca.

AUTHOR: Gorden, Sharon.
TITLE: Guess who snapping
CALL NO: 595.3 GOR
BARCODE: 37137030483033
Oakland DUE: 09-12-08
Replacement Bills
Replacement Bills are the third, and final, notice sent to the patron for an overdue item. This notice is generated **5 days after the second level notice has been sent**. Replacement bills will have the price of the item or the default charge (usually $20.00) for overdue items considered lost. They are generated once per item.

**Example of Replacement Bill:**

```
27137195995996
Eric Cartman
Mr. Garrison
South Park Elementary

04-27-09
Denver Public Schools
Oakland Elementary
Library Media Center

******************************* REPLACEMENT BILL! *******************************
The item(s) listed below are now considered LOST.
Please promptly return the item(s) or pay the replacement cost.
If you think this notice is in error, please see your librarian.
DO NOT REPLY VIA E-MAIL TO THIS NOTICE. CHECK WITH YOUR LIBRARIAN!
******************************* FACTURA DE REEMPLAZO *******************************
Los recursos anotados abajo ahora se consideraran como perdidos.
Por favor devuélvalos a la biblioteca sin demora
o pague el costo de reemplazo.
Si cree que este aviso es un error, por favor contacte a su biblioteca

ITEM       Amount
Arctic foxen / Townsend, Emily Rose
REPLACEMENT Oakland 37179384596214..............................$20.00
TOTAL: $20.00
```

**Courtesy Notices**

Courtesy notices are reminders sent to staff to inform them that their checked out items are almost due. Courtesy notices are generated by the system **daily** and are sent directly to the patron, using e-mail, if an address is present in the patron’s record. These notices are sent two days before the items are due. Because they are sent directly to the patrons, these notices are not available on the [Librarian Dashboard](#).

**Example of Courtesy Notice:**

```
07-08-09
Edna Krabappel
Denver Public Schools
Kepner Middle
Library Media Center

Please be reminded that the items listed below are due on the date shown. Please return them to the library or contact your librarian to request a renewal. Please do not reply via this e-mail.

AUTHOR: Hautman, Pete,
TITLE: Goddess
CALL NO: FIC HAU
BARCODE: 37137022369497
Kepner DUE: 07-10-09

AUTHOR: Lubar, David.
TITLE: Sleeping freshmen never lie
CALL NO: FIC LUB
BARCODE: 37137031399714
Kepner DUE: 07-10-09
```
Statement of Charges
Statement of Charges is a special kind of notice that presents an itemized list of the current fines and/or fees that a patron may have on their library account. Because the report list all charges a patron may have on their account, you may see notices for patrons that are NOT enrolled at your school, but they owe money for an item that belongs to your school.

Statement Example:

![Statement of Charges Example]

Inv #       Description                                    Amount
734315 OVERDUE Egyptian mythology A to Z : a young reader's com  $0.40
734316 OVERDUE Mythology / by Edith Hamilton ; illustrated by S  $0.40
734317 OVERDUE Egyptian mythology / Don Nardo..................  $0.40
TOTAL      OVERDUE                                     $1.20

The following items are currently checked out to you. Please return any overdue items as soon as possible. Contact your Librarian if you have questions about this statement.
Patron Records

How Student Records Are Loaded into Sierra
Student records are exported from the Infinite Campus system (IC) and sent to Library Services by the Department of Technology Services (DoTS). New and updated student records are loaded into Sierra daily. All student data (e.g. homerooms, teachers, grade levels, etc.) comes directly from IC. Library Services does not add any data to the student records.

How Staff Records Are Loaded into Sierra
New and updated staff records are extracted from the LAWSON system and imported into Sierra by Library Automation at the beginning of each month during the school year. However, due to lapses in the processing of employee data, there may be slight delays in getting some employee records from LAWSON. If an employee record does not appear in Sierra after a period of time, it may be necessary to manually create a patron record for them. This can be done by all school staff and does not have to be done by Library Automation. Refer to the next section for details.

Creating Patron Records in Sierra
In the event that a student or employee’s record is not available in Sierra, you have the option of manually creating the patron record in Sierra. Each school has been assigned a site–specific template in Sierra for the creation of patron records. Each template is pre–loaded with all of the necessary patron record fields for the school. To create a new patron record:

1. Select “Check Out (Circulation Desk)” from the function drop–down menu in Sierra.

2. Click the NEW button on the tool bar.

This will start the New Patron wizard which will step you through the process of creating the new patron record using the template assigned to your school. Sierra will prompt you through each step to enter specific data needed for the patron record. Enter the appropriate data for each of the fields and click the “Next” button. If you wish to exit
from the wizard without creating the patron record, click the “Cancel New Record Creation” button.

3. You will be prompted to enter the following data using your template. If you wish to see all the valid codes for a particular field, just double-click on the field. Below are the valid codes for the GRADE field.

The following information is all the data fields you will be prompted for during patron record creation. Some fields are required and must be added to the patron record.

   a. LANGUAGE – This is the patron’s spoken language. The default is ENGLISH. REQUIRED
b. **GRADE**—The grade level of the student. **REQUIRED**

![GRADE Image]


c. **PATRON TYPE**—The system designation for the patron (e.g. Community User, Student Elementary, Student Middle, Staff, etc.). **REQUIRED**

![PATRON TYPE Image]

d. **PATRON NAME**—This is the full name of the patron (as it appears in Infinite Campus, if possible). It must be entered **last name, first name, and middle initial**. If you do not enter the record in this format, you may not be able to find the patron when doing a name search in Sierra. **REQUIRED**

![PATRON NAME Image]

e. **ADDRESS**—This field contains the homeroom teacher’s name on the first line, and the name of your school on the second line. If no homeroom teacher has been assigned, just type your school name. **REQUIRED**

![ADDRESS Image]
f. **ADDRESS2** – This is the patron’s home address from Infinite Campus. If it is not available to you, leave it blank.

![ADDRESS2 example](image1)

g. **TELEPHONE** – This is the patron’s home telephone number from Infinite Campus. If it is not available to you, leave it blank.

![TELEPHONE example](image2)

h. **DPS STUDENT or STAFF ID** – This is the student’s 6-digit district ID number, or the employee’s 9-digit ID number. If the employee’s ID number is not available to you, leave this field blank. For “Community Users”, enter their Driver’s License number. **REQUIRED**

![DPS STUDENT or STAFF ID example](image3)

**Note**: **DO NOT** use a patron’s social security number as an ID number! Ever!

i. **CLASS ROOM** – This is the student’s 2nd period homeroom number or alternate room number if the student does not have a second period class. If creating a record for a staff member, enter “STAFF”. This field is also used for the Class Room Overdues report in Sierra.

![CLASS ROOM example](image4)
j. **P BARCODE** – This is the patron’s library barcode number.

**Library Barcode Algorithm:**

* For **students**, this will be a combination of “2713700” + their student ID number + a zero at the end. The total length of the barcode should always be **14 digits** (e.g. 2713700 + 999999 + 0 = 27137009999990).

* For **staff**, it will be a combination of “27137” + their employee ID number (e.g. 27137+123456789=27137123456789). The total length of the barcode should always be 14 digits.

k. After entering the patron barcode number, you will see the complete patron record. Verify the information in the record, then click the **Save/Close** button at the top of the screen to save the record. The record is now ready to be used.
**Adding Messages to a Patron Record**

You can add messages to a patron record at your discretion. These messages can be used to alert you, or the patron, of any notable situations every time their record is brought up in Sierra. For example:

- The patron disputes a fine.
- Information is needed for the patron record that wasn’t available earlier.
- Behavioral problems in the library.
- Teacher or classroom has changed.

To add a message to the patron record:

1. Select “Check Out (Circulation Desk)” from the FUNCTION drop-down list.

2. Bring up the patron record.
3. Click the **EDIT** button.

4. Once you’re in the patron record, click the **INSERT** button.

5. Select **MESSAGE** from the drop-down menu and type the message you want to display.

6. Click the **OK** button when done.
7. Click **SAVE/CLOSE** to save the changes.

8. The next time you bring up the patron record, the message you entered will display.

---

**Deleting Messages from a Patron Record**

To remove or delete a note from a patron’s record:

1. Retrieve the patron’s record in Sierra.
2. Click the **EDIT** button.
3. Look in the variable-length fields located in the bottom half of the patron record for the “message”.

4. Right-click on the message and select the option to **“Delete Field”**.
5. Verify that the message has been deleted from the patron’s record.
6. Click the **SAVE/CLOSE** button when done.
Duplicate Patron Records

Duplicates when creating a new patron record

In the event that you are creating a new patron record, and you enter a patron barcode or ID number that already exist in the system, Sierra will display a screen with the following:

![Duplicate record(s) found](image)

At this point you must verify the information on the displayed record. If the patron displayed is the one you are creating the record for, click the Close button, then click the Cancel button to cancel the creation of the new patron record. Sierra will ask you to confirm that you wish to cancel the creation of the record, click the “Yes” button.

Duplicates when searching for patron records

When bringing up a patron record, you will occasionally find duplicate patron records in Sierra. When this happens, make sure you are using the patron record with the most complete and accurate information to check out items. Make a note of the names and barcode numbers of the duplicate records and send the information to the Library Services Helpdesk to have the duplicate record deleted.
Student or Staff Barcode Labels

For those schools that do not receive student photo ID cards, you can print your own patron barcode labels from within your Library Dashboard.

To print patron barcode labels:

1. Go to your Librarian Dashboard.
2. Click CIRCULATION on the navigation bar.
3. Click PATRON BARCODES.

Once there, you will have the following options for printing barcodes. You can print:

- Barcodes for your entire school.
- Barcodes for a specific classroom.
- Barcodes for an individual patron.

There are also specific instructions on the site for setting up your internet browser to print the barcodes correctly. You must use the browser settings listed in the instructions in order to print barcodes for your library.
Holds (DPS Shares)

Overview
DPS Shares is the district method for borrowing and lending library materials among school libraries. The procedure uses the HOLDS function in Sierra and your district Outlook e-mail account to process hold requests. This section will cover the following topics:

- DPS Shares Guidelines
- Requesting Materials from Another School Library
- Notifying the Lending Library using the DPS Shares Email Generator
- Placing Holds on Materials at Your School
- Filling the Hold at the Lending Library
- Receiving the Hold at the Requesting Library
- Returning Requested Materials to their Owning Library
- Cancelling Holds
- Tracking Holds
- Modifying Holds

DPS Shares Guidelines
Below are some important guidelines to be followed by all sites that participate in DPS Shares:

- Use Title-Level when requesting materials from another library. Place Item-Level holds for materials at your school.
- Limit contact with the lending libraries using the DPS Shares Email Generator located in your Librarian Dashboard. Do not make hold requests or inquiries using Outlook distribution lists. (i.e. “+Librarians, All”), even when making multi-copy requests.
- Do not place holds on materials belonging to any of Library Services circulating libraries (Classroom, Professional, or Video Film).
- Do not allow patrons with overdue materials to request items through DPS Shares.
- Do not place holds on titles without call numbers.
- Do not place holds on titles where the call number is “ORDER BIB”.

Requesting Materials from another School Library
Before placing a hold on a title at another school, please make sure it is available. Try to borrow from a location that has multiple copies of the title.

1. Select “Check Out (CIRCULATION DESK)” from the FUNCTION drop-down list.
2. Bring up the patron record.
3. Click the **HOLDS** tab.

![Holds tab](image)

4. Click the **ADD HOLDS** button.

![Add Holds button](image)

5. A browse window will then open allowing you to do a search for the item.

![Browse window](image)

6. In the browse window, click the drop-down box to select the index you want to search by. (i.e. Title, Word, Author, ISBN, etc.).

![Drop-down box](image)
7. Next, type in the title (if searching by Title), then click the **SEARCH** button. A summary of the attached items will display if your item was found. If there are multiple titles in the system, double-click on one of them to display the holdings.

8. Click the **LOCATION** column heading to sort the attached items by their school location code. Make note of the locations that have multiple available copies of the item.
9. Click the **HOLD COPY RETURNED SOONEST** button.

![Summary](image)

10. In the “**Place a Title–Level Hold**” window, enter the following:
   a. **No. of Holds** – Allows you to place multiple holds on the title for one patron. Please leave this at 1.
   b. **Pickup Location**: – Your school should be listed here. If not, select it from the drop-down list.
   c. **Limit to Location**: – The lending library you are requesting the available item from. Enter the school code number you made note of in step 7 or select the numeric school code from the drop-down list.
   d. **Not Wanted Before**: – OPTIONAL
   e. **Not Wanted After**: – OPTIONAL
   f. **Hold Note**: – OPTIONAL
11. After entering the above information, click the OK button to submit the hold request. The hold will now show in the patron’s record under the HOLDS tab. If done, close the patron record.

![Holds Table](image)

**Notifying the Lending Library using the DPS Shares Email Generator**

After placing your hold request, you’ll need to notify the lending library. This is done using the email function located on the Librarian Dashboard. If you do not have access to the Dashboard, contact the Library Services Helpdesk.

1. Log into the Librarian Dashboard.
2. Click on “Circulation”.
3. Click on “DPS Shares Email Generator”.
4. Type the title of the book you are requesting.
5. Type the call number of the book.

   **STEP 2: ENTER THE CALL NUMBER:**

6. Next, choose the location code of the lending library. Only library locations with an active librarian or tech will be listed.

   **STEP 3: CHOOSE THE LENDING LOCATION**
   - 159
   - 186
   - 197
   - 208
   - 217
   - 224
   - 235
   - 165
   - 188
   - 199
   - 209
   - 218
   - 225
   - 236
   - 166
   - 189
   - 201
   - 210
   - 219
   - 226
   - 240
   - 172
   - 190
   - 203
   - 213
   - 220
   - 227
   - 241
   - 174
   - 194
   - 205
   - 214
   - 221
   - 228
   - 242

7. Click the **Generate the Email** button to create an Outlook email message.

   ![Generate the Email Button]

8. Modify the message, if desired, then click the **SEND** button.

   ![Outlook Email Message]

To fill this DPS Shares request, please CHECK IN and inter-office mail the book to the requesting library. Thank you.
Placing Holds on Materials at Your School
You can place item–level or title–level holds on the materials that your school owns that are not available or are currently checked out. To place an item–level hold for a book at your school, do the following:

1. Select “Check Out (CIRCULATION DESK)” from the FUNCTION drop–down list.
2. Bring up the patron record.
3. Click the HOLDS tab.

4. Click the ADD HOLDS button.

5. In the browse window, click the drop–down box to select the index you want to search by. (i.e. Title, Word, Author, ISBN, etc.).

6. Next, type in the title (if searching by Title), then click the SEARCH button. A summary of the attached items will display if your item is found. If there are multiple titles in the system, double–click on one of them to display the holdings.
7. Click the **LOCATION** column heading to sort the attached items by their school location code. Look for the checked-out items with your school’s location code.

![Summary](image)

8. Highlight the **unavailable** item you wish to place a hold request for and click the **HOLD SELECTED ITEM** button.

![Summary](image)

9. In the **Place an Item-level Hold** box, enter the following:
   a. Pickup Location – Your school should be appearing here. If not, select it from the drop-down list.
   b. Not Wanted Before: – **Optional**
   c. Not Wanted After: – **Optional**
   d. Hold Note: – **Optional**
10. In the “Recall Item” dialog box, click the option to “Place hold without recall” button.

![Recall Item dialog box](image)

11. Verify that the item appears under the **HOLDS** tab in the patron record. If not, repeat the previous steps.

![Holds tab](image)
Filling the Hold at the Lending Library

If you’ve received e-mail notification of a hold request from another school, please do the following to fill the hold:

1. Retrieve the requested item from your shelves.
2. Select the “Check In (No Patron)” function from the Sierra drop-down list.
3. Check in the requested item to activate the hold request. You’ll get a dialog box asking you to confirm that you are putting the item on hold for the requesting school. Click the button “Put In Transit to requesting school”.
4. Next, you’ll be prompted to print the transit slip. Click the YES button to print the slip and place it inside the front cover of the book.
5. Put the book into a DPS SHARES bag and send to the requesting school through interoffice mail.

Receiving the Hold at the Requesting Library

Once you receive the item in the DPS SHARES bag:

1. Check in the item using Sierra. You’ll be presented with a dialog box notifying you that the item is on hold. The notification will include the patron’s name.
2. Click the YES button to print the hold pickup notice.
3. Place the hold pickup notice inside the front cover of the book and place it on your hold shelf.
4. Notify the requesting patron.

Returning Requested Materials

When the patron returns a requested item, you’ll receive notification from the system that the item belongs to another location.

1. Make note of the school that owns the item, print the “Transit” slip and place it inside the front cover of the book. The status on the item will be changed to “In Transit” and a note will be added to the item record.
2. Place the book inside a DPS SHARES bag and send it back to the owning school.
3. Once the book arrives at the owning school, check in the item to remove the “In Transit” status.

**Cancelling Holds**

To cancel a hold for a patron:

1. Select “Check Out (Circulation Desk)” from Sierra drop-down menu.
2. Bring up the patron’s record in Sierra.
3. Click the HOLDS tab.
4. Highlight the item you want to cancel the hold for.
5. Click the CANCEL HOLDS button.
6. In the dialog box that appears, click the CANCEL HOLDS button.
**Tracking Holds**

You can track the status of any outstanding holds at your school using the “View Holds” function in Sierra. The display updates every night on the LION system. It will not show updates for the current date until the overnight process runs. To view the status of your holds:

1. Select “View Outstanding Holds” from the function drop-down box in Sierra.
2. Under the “Limit Display To:” section, keep the default date in the “Holds placed before” area and verify that your school name is selected under the “Pickup Location” section.
3. Leave the PATRN NAME field blank.
4. Click the “View Outstanding Holds” button.
5. The system will now display any outstanding holds you have placed from your school.

The holds display breaks down as follows:

**OUTSTANDING:** – The current total number of holds placed at your school.

**ON HOLD SHELF:** – The current number of held items that are awaiting pickup at your school.

**BIB LEVEL:** – The current number of bib level holds placed at your school.

**ITEM LEVEL:** – The current number of item level holds placed at your school.
**Date Placed** – The date the hold was placed by the patron.

**Not Needed** – The date the hold is no longer needed by the patron.

**Patron Info** – The patron’s name and phone number.

**Title** – The title of the book.

**Call #** – The Dewey call number of the item.

**Location** – The location of the library that owns the item. If the bib-level hold has been activated, the location code of the lending library will appear here. If blank, the bib-level hold has not been activated. If this is an item-level hold, the location code of the item will display after the overnight hold update process has been run. The location code will display even if the hold has not been activated for item-level holds.

**Pickup Location** – Where the requested item is being picked up/sent to.

**Hold Status** – The current hold status of the item.

---

**Viewing hold requests that are “In Transit” to your school.**

To view requested items that are “in transit” to your school from another school:

1. In the “Limit to Display” area, keep the date in the “Holds placed before” section.
2. In the “Limit to Display” area, change the drop-down box to “STATUS”.
3. In the textbox, type “IN TRANSIT”.
4. Make sure your school is selected in the “Pickup Location” area.
5. Click the “View Outstanding Holds” button.

---

**Viewing requested items “On Holdshelf” Items**

To view held items that you’ve received from another school or local requests that have been filled and are now on your holdshelf:

1. In the “Limit to Display” area, keep the date in the “Holds placed before” section.
2. In the “Limit to Display” area, change the drop-down box to “STATUS”.
3. In the textbox, type “ON HOLDSHELF”.
4. Make sure your school is selected in the “Pickup Location” area.
5. Click the “View Outstanding Holds” button.

---

**Displaying Hold Requests Placed on your Items.**

To view hold requests placed on items that belong to your school:

1. In the “Limit to Display” area, keep the default date.
2. In the “Limit to Display” area, change the drop-down to “Item Location”.
3. In the textbox, Type your school location code.
4. “Make sure “All” is selected in the “Pickup Location” area.
5. Click the “View Outstanding Holds” button.
Modifying Holds
You can modify the information on a requested item in Sierra at any time as long as it has not already been checked out. To modify the hold information on an item:

1. Bring up the patron’s record in Sierra.
2. Click the HOLDS tab.
3. Select the item you wish to modify.
4. Click the MODIFY HOLDS button.
5. At this point, you can modify the Pickup Location, Not Wanted Before, Not Wanted After, and the Hold Note. After making your changes, click the OK button.

DPS Shares – Best Practices

- Don’t be overly possessive about your books. The goal of DPS Shares is to get the books in the hands of the district’s students who need them.
- Check in requested items in Sierra before sending them to another school. This will activate the hold.
- View your holds daily. (See “Tracking Holds”)
- Clear expired holds from your hold shelf daily.
- Process hold requests from other schools as quickly as possible.
- If there is an issue with a hold request, communicate your concerns with the librarian at the other school.
- Do not request materials from the Classroom, Professional, or Video Film Libraries using DPS Shares. Each of these libraries has their own method for fulfilling requests for materials. Check their pages on the LION for more information.
- Notify the Library Services Helpdesk (ers_helpdesk@dpsk12.org) if you have any questions regarding DPS Shares procedures.
Printing in Sierra

Printing Overview
Sierra allows you to print a variety of print jobs depending on which screen you are viewing. Available print jobs include receipts, tables, reports, lists and individual records.

Types of Printers in Sierra
Sierra defines various printer categories for the different print jobs available. The categories are:

- **Standard Printer** – Used to print record browse displays, summaries of attached items, overdue items reports, outstanding holds reports, and item/bibliographic/patron records.
- **Label Printer** – *NOT CURRENTLY AVAILABLE TO CIRCULATION STAFF.*
- **Form Printer** – *NOT CURRENTLY AVAILABLE TO CIRCULATION STAFF.*
- **Receipt Printer** – Used to print receipts for checked in items, fines from a patron’s record, and tables of checked out items.

Setting Up Default Printers in Sierra
In order to print from Sierra, you must first set up a default printer for each printer category. You can use any physical printer for this including network printers or printers attached directly to your circulation computer. To set up your default printers:

1. Click **File** on the menu bar in Sierra.

2. Choose **Select Printer > Standard Printer**.
3. Select either the **Local Printer** or **E-mail Printer**:
   a. **Local Printer** *(Recommended)* – This will be the network or attached printer connected to your circulation computer.
   b. **E-mail Printer** – Sierra will send the print output to one or more e-mail addresses. This can be useful for those occasions where paper usage is an issue, or you need an electronic, editable copy.

   **Note**: To send a copy of your printout to multiple e-mail addresses, separate each address entry with a comma.

4. After choosing **Local Printer**, choose which printer you want the output to go to. You choices will be limited to the printers you currently have set up in Windows. Select the printer you want to use then click the **OK** button.
5. Repeat steps 1–4 to set up a default Receipt Printer.
6. Test your print setup by navigating to different Sierra screens, mouse over the Print button on the Sierra toolbar to determine which printer category will be used, then click the Print button. Your output should go to the default printer you set up. If not, repeat steps 1–4 in this section. If there is still a problem, contact the Library Services Helpdesk.

**Note:** For charter schools using VPN clients to access Sierra, you may experience problems printing to a network printer at your school when logged into the VPN client. If this is the case, contact the Library Services Helpdesk.
Self-Checkout (Express Lane)

Overview
Express Lane is the name of our new version of self-checkout software from Innovative. Express Lane has a graphical user interface that allows your patrons to checkout and renew items themselves with minimal intervention from library staff. However, patrons cannot check in items using Express Lane. Materials must be checked in using the Sierra Desktop App on the circulation desk.

Self-Checkout Requirements
In order to use self-checkout at your school, you must have the following:

- A PC with a minimum of 1GB of memory. (Does not have to be a new one.)
- Mouse/Keyboard
- An LCD monitor that will support resolutions of 1024 X 768 or greater.
- An additional library barcode scanner. (Ordering information can be found here.)
- A receipt printer (optional). (Ordering information can be found here.)
- An Express Lane account setup by Library Services.

Note: Express Lane will not work on Mac computers. You must use a PC.

Installing Express Lane
In order to install Express Lane, you or your School Technology Representative (STR), must have local administrative rights on the computer you wish to install the software on. You will not be able to install the Express Lane software without administrator permissions.

1. Open your web browser and go to the following address:
   http://simba2/sierra/express/milup160_02.exe

2. When prompted, choose the option to save the “milup160_02.exe” file to your Windows desktop. Close your web browser after the file has downloaded.

3. Find the “milup160_02.exe” file on your desktop, or in your “Download” folder, and double-click on it to launch the Express Lane install program. If prompted with a warning, allow the program to be installed by clicking the “Yes” button on the dialog box.
After a few seconds, the install program will present you with the following dialog box. Click the NEXT button to continue with the install.

4. In the **Choose Shortcut Folder** setting, accept the default settings but be sure to check the box “**Create Icons for All Users**”. This will create an Express Lane icon for anyone that logs into that computer. Click the NEXT button to continue.
5. Next, you are prompted for the “Server domain/IP Address”, enter “lion.dpsk12.org” (without quotes.), then click the NEXT button.

6. Next you will get a pre-install summary, Click the INSTALL button to complete the Express Lane installation on your computer.
7. After the Express Lane installation, click the **DONE** button.

![Image of Install Complete dialog box]

8. You should now see the **Innovative Millennium** icon on your desktop. Right-click on the icon and select **PROPERTIES**. In the **Target** section enter the following text (without the quotes)

```
"C:\Millennium\iiirunner.exe ip=lion.dpsk12.org port=64000 program=milmyselfcheck"
```

When done, click the **OK** button.
Note: If you do not enter the above information into the “Target” section correctly, Express Lane will not launch properly.

9. Next, double-click the “Innovative Millennium” icon to launch Express Lane.

10. When prompted, log in to Express Lane. Contact the Library Services Helpdesk for the credentials for your school.

If you have any problems launching the Express Lane application or with logging in, contact the Library Services Helpdesk (ers_helpdesk@dpsk12.org).
Launching Express Lane

Launch Express Lane by double-clicking the “Innovative Millennium” icon on your computer desktop. When prompted for a username and password, enter the Express Lane credentials for your school. If you do not know what your Express Lane credentials are, contact the Library Services Helpdesk (720.423.1842).

![Innovative Millennium Icon]

**Note:** Your Sierra login credentials will not work for Express Lane except to close it.

Checking Out using Express Lane

1. At the Welcome screen, scan or type the patron’s library barcode number.

![Welcome, Please scan your library card]

2. Next, scan the barcode of each item you want to check out.

![Welcome, HOMER J. SIMPSON. Please scan your item]

37137028839253

New check outs (0)
Title
3. You’ll see the items being checked on the display below the patron name.

![New check out (1)]

<table>
<thead>
<tr>
<th>Title</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>The glove of Darth Vader / Paul Davids and Hollace Davids ; pencils by Benton Jew ; industrial light &amp; magic finished art by Karl Kesel.</td>
<td>10-08-2013</td>
</tr>
</tbody>
</table>

4. When the patron has finished checking out all their items, they must click the **SIGN OUT** button in the upper right-hand corner of the Express Lane screen to close their session.

![Sign out]

**NOTE:** If the current user does not sign out, Express Lane will timeout after 20 seconds and return to the Welcome screen.

**Closing Express Lane**

1. Click the **CLOSE** button for Express Lane in the upper right-hand corner of the screen.
2. Enter your Sierra credentials, then click the **OK** button.

![Login and Password dialog]

Next, you will be asked to confirm that you want to exit Express Lane, click the **YES** button.

![Warning dialog]
Express Lane Error Messages

Please scan your library card again.
   The patron’s record may be blocked.

Your library card number cannot be located. Please try again or see a staff member for assistance.
   This message happens at the Express Lane Welcome screen when the barcode number cannot be found on the system, or the patron barcode number was typed incorrectly. You cannot do name searches in Express Lane as you can in Sierra. Patrons must either scan or type their complete library card number at the Welcome screen. If patrons receive this message, they can try re-scanning their barcode, or see their librarian.

This item cannot be checked out. Please try again or see a staff member for assistance.
   This message occurs during the checkout process. Some of the reasons this may occur are:

   • The barcode for the item is not in the Sierra database.
   • The item may be non-circulating material. (i.e. Reference books)
   • The item barcode was not scanned properly.

You have too many overdue items. Please see a staff member for assistance.
   Patron has reached the maximum number of overdue items allowed.

There are outstanding fines on your account. Please see a staff member for assistance.
   Patron’s fines exceed the maximum amount allowed.

There are unresolved issues with your account. Please see a staff member for assistance.
   Patron’s record contains a manual block.
Circulation Reports

Available Reports
Several report types are available to you from LION. They come in three categories:

- **Library Services Created Reports**
- **Web Management Reports**
- **Librarian Dashboard Reports**

Library Services Created Reports
Library Services Created Reports are reports that can be created only by Library Services. They cannot be created locally at the schools. You must submit your request, by e-mail to, the **Library Services Helpdesk**. The following reports are available through Library Services:

**Shelf List (L1000)**
The Shelf List report contains all the holdings for your school including checked out items. It does not include textbooks or Teacher Resource books unless you ask to have them included. The report is sorted by bibliographic call number and title.

**Withdrawn Items (L1010)**
The Withdrawn Items report contains all the items that you have manually withdrawn from your collection by changing the item status to “w”. The report is sorted by call number and title, and includes the date the item was withdrawn from your collection.

**Missing Items (L1015)**
The Missing Items report contains all items in your collection that have a status of “Missing (m)” or “Claims Returned (z)”. The report is sorted by call number and title.

**Lost & Paid (L1020)**
The Lost and Paid report contains all lost items in your collection that have been paid for by the patron, or the charge has been waived. It does not include any items that have a current “billed” status. The report is sorted by bibliographic call number and title.

**Billed Items (L1025)**
The Billed Items report contains all lost items in your collection with a “Billed (n)” status that have not been paid for or replaced by the patron, or have not had the charges waived. The default report is sorted by classroom and then by patron name, but can be sorted by grade level as well. The report data includes the classroom, patron name, ID number, grade level, total owed, and the individual billed items for the patron.
**Overdue Items (L1028)**
The Overdue Items report contains all overdue and billed items in your collection. The report is sorted by classroom and then by student. The report can also be sorted by grade level.

**Checked Out Items (L1030)**
The Checked Out Items report contains all checked out items in your collection including overdue and billed items. The default report is sorted by classroom and then by student name, but can be sorted by either grade level or patron’s last name.

**Reports for High School Seniors**
To assist high school libraries in resolving issues with overdue items checked out by senior students, the following reports are available:

**Billed Items–Seniors Only (L1032)**
This report lists all senior students at your school that have billed items on their record. The report can be used by you or your school treasurer to aid you in the recovery or replacement of the lost items prior to the student graduating. The report is sorted by the student’s last name.

**Overdue Items–Seniors Only (L1034)**
The Senior Overdue Items report list all overdue items checked out by senior students. The report will list all overdue items including items that have reached “billed” status. It will also show the last overdue notice level printed for the item. The report is sorted by the student’s name.

**Checked Out Items–Seniors Only (L1036)**
The Seniors Checked Out Items report lists all items currently checked out by the senior students. The report may include overdue books and books that have reached “billed” status. The report is sorted by classroom, then by student’s name. The report can be sorted by the student’s last name.
Requesting Library Services Created Reports

You can request a report from Library Services at any time during the school year. In order for your report request to be processed, you must submit it to the Library Services Helpdesk. Otherwise, you will not receive the report. To submit a report request:

1. Determine the report you want from our list of available reports.
2. Include the name and number of the report in the e-mail.
3. If you require special processing for your report such as a specific date range, grade levels, or patron types, please include that in your request. Otherwise you will get the default report from us.
4. Send the report request to the Library Services Helpdesk Sierra e-mail.

Note: Please be aware that we will make every attempt to get your reports to you as soon as possible, but delays can happen. We ask that you allow up to 5 business days to process any report requests. If you have a deadline for a particular report, please plan accordingly.

Library Services Created Reports Delivery

All reports created by Library Services will be sent to your district Outlook e-mail address as a PDF attachment. In order to view, or print, the reports, you will need to have the latest version of Adobe Reader installed on your computer. We can send the reports to you as a Microsoft Word attachment upon request.

Web Management Reports

Web Reports are circulation reports that are run by the schools themselves and do not require Library Services help. The reports are web-based and are run at your convenience using the latest version of Internet Explorer, Mozilla Firefox, or Safari. Web Reports are run on the PC or Mac platforms. The Web Browser Interface is the primary way to access the Web Management Reports. It allows you to configure and view your reports from within your internet browser.

Circulation Reports – Web Browser Interface.

You can access the Web Reports by doing the following:

1. Open your Internet browser (IE, Firefox, Safari)
2. In the address bar of your browser, type in the following URL:
   http://lion.dpsk12.org/manage
3. You should see the screen below.

![Circulation Screen]

4. Under the **CIRCULATION** section, click the “Circ Activity” button.

![Circ Activity Clicked]

5. When prompted, enter your Sierra login and password for your school. If unsure, contact the [Library Services Helpdesk](#). Click the “Submit” button when done.
After entering the initials/password for your school, you should see the following screen:

![Reports Screen]

The following circulation reports are available here:

**All Activity**
The All Activity report contains the circulation activity for all schools on the LION system. It contains the number of checkouts, check ins, renewals, and holds placed. Because this report is run for all schools, it can take several minutes for it to display the report data. It is advised that schools **not** run this report for circulation statistics.

**Booking** – **NOT USED BY CIRCULATION STAFF.**

**Checkout**
The Checkout report shows the checkout activity for your school by patron, grade, or item type. For example, to generate this report by grade level:

1. Click “Circ Activity” under the CIRCULATION section on the main menu.
2. Enter your Sierra login and password if prompted.
3. Click Checkout under the CIRC STATS section.
4. Select “User Spec” under the DATES section.
5. Click “One Only” under LOCATIONS.
6. Under TYPE, click GRADE.
7. Click the SUBMIT button.
8. Select the STARTING and ENDING month.
9. Select your school from the drop-down list.
10. Click the SUBMIT button.
Filled
The Filled report shows a detailed analysis of filled hold activity. A hold is "filled" when an item requested by a patron is checked out to the patron.

Renewal – NOT USED BY CIRCULATION STAFF.

Inhouse – NOT USED BY CIRCULATION STAFF.

Hourly – NOT USED BY CIRCULATION STAFF.

Title – NOT USED BY CIRCULATION STAFF.

Patrons – NOT USED BY CIRCULATION STAFF.

Requests – NOT USED BY CIRCULATION STAFF.
Librarian Dashboard Reports
The following reports are available to you on your Librarian Dashboard. Most of these reports have “real-time” data regarding your library circulation and collection status, the only exception are the Bills/Notices/Statements of Charges reports:

Circulation Reports:

Checked Out Items
A report of checked out items at your school broken down by classroom, grade, or your entire school.

Overdue Items
A report of overdue and billed items at your school broken down by classroom or grade. The report will also show patrons at other schools that may have overdue or billed items from your school.

Patron Fines
This report shows all the fines and fees owed by patrons at your school. You can view all the fines for the entire school, or you can break it down by classroom or grade.

Collection Reports:

Collection Breakdown
This report features a general breakdown of your collection by ITYPE, Dewey Call Number, Spanish titles, Aged title cutoffs, and a snapshot of your overall collection.

Inventory Information
This report displays the school year for your next scheduled library inventory, an list of Frequently Asked Questions, and your school’s inventory history.

Weeding Information
This report has your current “Must Weed” status along with a set of guidelines for discarding books from your collection.
Statistical Reports:

District Circulation Reports
A set of statistical circulation reports for your school with breakdowns in several areas including:

- Checkouts per month
- Checkouts per student
- Yearly totals by school year
- Yearly totals per student
- A level comparison with similar schools based on level

Online Database Usage
A statistical report of the online database usage for your school. The report includes the number of sessions per database, including the name of the database.

DISCLAIMER: Our vendor made some changes last year to a feature (scoping) that we were re-purposing to determine what school a patron was at when they clicked on a link in LION to go to a database. What this meant to you: if your students begin their session in LION on the homepage or on your school catalog page and then subsequently go off to the databases, the event will be recorded normally. If, however, they have the page with the list of databases bookmarked in their browsers and begin their LION session directly there, the event will not be attributed to your school.

We are leaving the mechanism that tracks school-level usage in place– it still covers around 60% of the total usage and can help show us in general terms what types of schools are using a resource– e.g. elementary & k-8’s vs. high schools. Obviously we won’t be using these numbers to do any school-to-school comparisons though (not that we ever were before either.) We would not recommend using the data we generate for your SGO’s– but if you feel like you can control your students usage in such a way that they won’t be using bookmarked links to the databases list (e.g. by making your school’s catalog page in LION the browser’s start up page for the computers in your lab) then you will get accurate numbers.
II. Item Record Management

- Item Record Management Overview
- Item Record Management (At-A-Glance)
- Attaching New Items
  - Searching for a bibliographic record
    - Multiple ISBN matches
    - Can’t find a matching ISBN
    - Creating bibliographic records
  - Creating an item record
    - Editing item records
    - Duplicate items
- Withdrawing Items (Deleting Items)
  - Batch Withdrawing Items
- Gift Books
- Spine Labels
- Best Practices
Item Record Management Overview

Item record management is the process of adding, or modifying, item records in the LION database. Most new library materials are already added to the database during the processing of your books by the Cataloging Services Department. “Gift” books, which are items donated to your library or purchased directly by you from a book retailer are the exception to this.

**IMPORTANT NOTE**: It is strongly advised that you attend Item Record Management training before using any of the procedures outlined in this documentation!

Topics covered in this section are:

- Item Record Management (At-A–Glance)
- Searching for a Bibliographic Record
- Creating an Item Record
- Gift Books
- Textbooks
- Magazines
- Monthly Selections (e.g., Junior Library Guild)
- Realia
- Spine Labels

Item Record Management (At-A–Glance)

To add new items to the database:

- Search for the appropriate bibliographic record by the ISBN of the book.
- Verify that the bib record is good:
  - Verify the ISBN.
  - Check for a call number in the bib record.
  - Make sure the call number in the bib record is not “ORDER BIB”.
- Select the bibliographic record.
- Create the new item record:
  - Enter the item call number.
  - Enter the price. (optional)
  - Enter the itype code.
  - Enter the item barcode.
- Verify and Save the new item record:
  - Verify ITYPE.
  - Verify LOCATION.
  - Verify CALL NUMBER.
  - Verify BARCODE number.
Adding New Items

Searching for a Bibliographic Record
To search for a bib record to attach your new item:

1. Select “SEARCH/HOLDS” from the FUNCTION drop-down menu.

2. In the “Index” drop-down box, select “ISBN”.

3. In the textbox, type or scan the ISBN number from the book. Then click the SEARCH button to search the database for a match.

Below is the display in Sierra after finding a bib record with a matching ISBN:
4. If an ISBN match is found, look at the brief bib information in Sierra to see if the record can be used. An item can be attached if the bib record meets **all** of the following criteria:
   a. The bib record has a call number.
   b. The call number is not “**ORDER BIB**”.

**Multiple ISBN Matches**
In the event of multiple ISBN matches, select one of the good bibs to attach your item to, and then notify the Library Services Helpdesk of the problem. Please include the title and ISBN number in your e-mail.

**Can’t find a matching ISBN in the database**
In the event you can’t find an exact ISBN match, DO NOT attempt to attach your item(s) to any of the records. You can only attach items to records that have the matching ISBN. Notify the Library Services Helpdesk by sending the full title and ISBN of the book. The information will be forwarded to the Cataloging Services department so that a new bibliographic record can be created. If you have several books that you cannot find, please refer to the **Gift Book** section for details.

**Creating Bibliographic Records**
The creation of original bibliographic records is done exclusively by the Cataloging Services department at Library Services. If you cannot find a bib record in the system, please submit a request through the Library Services Helpdesk to have one created. Refer to the **Gift Book** section for more information.

**Editing Bibliographic Records**
The **EDIT** button, while in **SEARCH/HOLDS** mode, will attempt to open the **bib** record for editing and you will be prompted for your system initials and password. Direct modifications to bib records can only be done by the Cataloging Services department. If there are corrections that need to be made to a bibliographic record, please submit your change requests to the **Library Services Helpdesk**. If you wish to edit an item record, refer to the “**Editing Item Records**” section.
Creating an Item Record

Once you find a matching ISBN in the database, you are ready to create the item record. The system uses a template to step you thorough the process of creating the item record. Please pay careful attention to the prompts and enter the appropriate information. To create and add an item to your collection, do the following:

1. In the **VIEW** drop-down box, select “**Item**”.

![Image of item record creation template]

2. Next, click the **“Attach New Item” button**. This will start the item record creation wizard using the item record template for your school.

![Image of item record creation wizard]

3. Enter the appropriate **ITYPE** code for the item. Double-click in the textbox to see all the valid ITYPE codes. Once you have entered the ITYPE, click the **NEXT** button.

![Image of ITYPE selection]

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Version 2.2.2
4. Enter the price of the item you are creating. This will be the amount charged to the patron if the item is lost. If you leave the field blank, the default charge of $20.00 will be applied if the item is lost. (Optional)

5. Next, enter the call number for the item. In most cases, you will use the call number in the bibliographic record. However, if you use local call numbers for special collections, enter that call number. Call numbers should be entered in UPPER-CASE.
6. Scan or type the item barcode.

![Barcode Scan]

7. After entering the barcode number, you'll see the item record you’ve just created.

![Item Record]

8. Verify the following information in the item record:
   a. The **ITYPE** code
   b. The **LOCATION** code. Make sure your school number appears here.
   c. The **ITEM STATUS**. This should be set to “Available”.
   d. The **ITEM CALL NUMBER**. This should match the bib call number if you are not using local call numbers.
   e. The **ITEM BARCODE NUMBER**. Make sure it is present, and is a complete 14-digit barcode number. Also, verify that the barcode number is in the correct field. Make sure it is not in the **CALL NUMBER** field!
9. After verifying the information in the item record, click the **SAVE** button to create the permanent item record.

10. After saving the record you can enter a new ISBN number to search for a new bibliographic record and create a new item record if needed.

**Duplicate Item Records**

It is possible to create duplicate item records in Sierra while adding records to the system. LION uses the **item barcode** as a matching point to determine if the item is a duplicate. In the event of a duplicate record being created, the system will notify you during record. This notification will occur immediately after you scan the barcode of the item.

In the event you get this message, please do the following:
1. Click the **CLOSE** button in the tool bar.

![Close button](image)

2. Next, click the **CANCEL RECORD CREATION** button.

![Cancel Record Creation button](image)

3. Verify the barcode of the item and replace if necessary. Make sure the barcode sheet you have doesn’t contain duplicates. If it does, notify Library Services immediately. After checking the barcode, try creating the item record again.

4. In the event you do create a duplicate, you can mark the status of the item as “Withdrawn”. You cannot delete duplicate items once created. Duplicate items are monitored on the system and removed from the database several times during the week. Please be mindful of the note below:

**IMPORTANT NOTE:** Library Services does monitor the number of duplicate records created on the system. If your school is creating duplicate records frequently, you will receive notification from the Library Systems Administrator via email. If you continue creating duplicate records after this notification, your ability to create item records may be suspended. Once suspended, you will have to be re-trained in Item Record Management procedures before your access to this function is restored.
**Editing Item Records**
Sierra will allow you to edit item records. The circumstances in which you may want to edit an item record are:

- To correct errors made in the creation of the record.
- To correct or change item call numbers.
- To correct, or change, the barcode number of an item.
- To withdraw an item from your collection.
- To add a note to the item. (Such as, noting damage or set information, etc.)

**NOTE:** Sierra will only allow you to edit records with your school’s location code. If a record does not have your school’s location code, you will not be able to modify the information in the item record. Also, you cannot modify any records that are “busy” or “In use” by the system.

To make changes to an existing item record:

1. Select **SEARCH/HOLDS** from the **FUNCTION** drop-down menu.
2. Scan or type the barcode number of the item you want to modify.
3. Double-click on the highlighted item to bring up the item record.
4. Modify the information you want to change.
5. Verify the changes, then click the **SAVE** button.

**Withdrawing Items**
Withdrawing is the primary method available to librarians for removing items from their collections. You cannot directly delete items from the LION database. Library Automation permanently deletes withdrawn items from the database at the end of each month of the school year. An archive of all the withdrawn items is kept for the current school year for reporting purposes. Withdrawn items will also be deleted at the following times:

- Prior to a Titlewise report update.
- After a **scheduled** library inventory.

To withdraw items from your collection:

1. Select **SEARCH/HOLDS** from the **FUNCTION** drop-down menu.
2. In the “**Index**” drop-down menu, select **BARCODE**.
3. Scan or type the barcode of the item you want to withdraw.
4. Double-click on the highlighted item.
5. Verify that the item has your location code in the item record.
6. Change the item status in the record to “Withdrawn”

![Image of a screen showing the item status as Withdrawn]

7. Save the item record by clicking the **SAVE** button.

**NOTE:** Do not withdraw checked out items! Make sure any item that you mark as “withdrawn” is NOT still checked out!

**NOTE 2:** Items with the status of “withdrawn” will be suppressed from displaying in LION.

**Batch withdrawing items**

As an alternative to withdrawing items one-by-one from your collection, you may scan the barcodes of multiple books into a Notepad or Word document, and then submit the list to the [Library Services Helpdesk](mailto:libraryservices@yourcampus.edu) for batch deletion. The benefits of withdrawing items using this method are:

- You don’t have to change the status of the items to “withdrawn” in Sierra.
- You get much faster processing of discarded/weeded items.
- You don’t have to wait for the scheduled Library Services deletion of all withdrawn items.

To batch withdraw items:
1. Open a blank document in Notepad or Microsoft Word.
2. Scan the item barcode. You don’t have to include any additional information or create a special format.
3. Repeat until done.
4. Save the document. Include either your school name or number in the name of the document and include the date (e.g. **South030110** or **456Mar10**).
5. When done, send your list as an e-mail attachment to the [Library Services Helpdesk](mailto:libraryservices@yourcampus.edu) for processing.
Gift Books

A gift book is any item donated to, or purchased, for your library that was not obtained through the Acquisitions Department at Library Services. Donated items should meet the same selection criteria as purchased materials as far as need, quality, appropriateness, usability, etc. As a member of your school’s professional staff, you may decide on the best use for donated items.

If you need just a few bibliographic records added to LION, please send the title and ISBN number of the book to the Library Services Helpdesk as outlined in the “Can’t find a matching ISBN in the database” section in this manual.

If you need several new bibliographic records added, or if you would like gift books added to your collection for you, please wait for an email from Cataloging Services notifying you when it is acceptable to send in gift books for processing. The department usually offers this service once a year, in the spring. Turnaround time depends on the total number of gift books received at that time.

NOTE: As the processing of new book orders is our main priority, and storage space is limited, please do not send gift books until notified by Cataloging Services!

Spine Labels

All new books ordered through Acquisitions Services are shipped to you “shelf-ready”. There is no need for further processing of the item. However, when processing gift books at your school, you may need to create spine labels. Downloadable templates for common spine label styles are available on the Library Services website. Ctrl + Click one of the links below to open and save a template to your computer desktop. Each template is a full-page, grid-lined Microsoft Word 2003 document. The templates are designed to be printed using a laser printer.

- Demco's #WS14942230 (¾"h X 1"w)
- Highsmith's L97–31194 (1.88"h X .88"w)
- Highsmith's 26442 (1.25"h X .88"w)

DPS has discount agreements with both Demco and Highsmith. Find out more about ordering from these vendors by searching for “library supplies” on the Purchasing Department webpage.
III. Collection Development

- Collection Development Overview
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Collection Development Overview

One of our main objectives in the school library is to make available to faculty and students a collection of materials that will enrich and support the curriculum and meet the reading needs of the students and faculty. Collection Development is a continual process through which this is accomplished. The process involves understanding the needs of our users, evaluating our collections to see how well those needs are met, selecting new materials to add to the collection, routinely removing (weeding) those items that are no longer useful. The selection policies of the School District (Board Policy IJL – Library Materials and Resources Selection) and Library Services procedures direct this work.

The Collection Development staff is available to consult on collection needs. Under extenuating circumstances, you may request a one-on-one training session (in lieu of class) for electronic ordering, Collection Assessment Worksheets, and Budget Tracking. Library Services can also provide for a library evaluation visit if necessary. The work of collection development is directly related to the curriculum of the district and we therefore work closely with the DPS Teaching and Learning Department.

Policies and Procedures

The collection development work of the school library program is driven by the policies and procedures of the School District. The following School Board Policies guide the work of the school librarian.

- DPS Policy IJJ – Instructional Materials (Textbook) Selection and Adoption
- DPS Policy IJL – Library Materials and Resources Selection (includes review and reconsideration)
- DPS Policy IJL – Library Media Program
- Superintendent’s Procedures for Reconsideration of Library Materials and Resources

User Needs

Analysis of the needs of the library’s users is an essential component in collection development and selection. Surveys and conversations with students, teachers and administrators can be valuable tools for gathering information about the user’s expectations for the library.

Collection Assessment

Collection assessment is the procedure by which the librarian determines if the collection meets the curricular, informational and recreational reading needs of a school's students and staff. Assessment is an important tool for evaluating the materials in a Library Collection. The assessment shows the overall size and age of general and specific areas of the collection as judged against a rubric. It illustrates the strengths and weakness of the collection, provides a
guide for purchasing new materials, and identifies materials that need to be weeded. The Follett TitleWise Collection Analysis tool is provided to assist in this work. TitleWise can be accessed at: http://www.flr.follett.com/login/ or from the Librarian Dashboard.

Evaluation and Revision
A collection development plan should be built based on the data from the collection assessment and information gathered in collaboration with teacher and students. The plan should address new materials that need to be added to the collection and guide the weeding (removal) of materials that are outdated, damaged, or inaccurate.

TitleWise Collection Analysis
TitleWise Online Collection Analysis is a tool designed to help you assess your library collection and identify strengths and areas of needs, make decisions about purchases and weeding, and have the information you need to advocate for your library.

There are many features available on TitleWise to help you analyze your library collection. Some of these features include:

- A Collection Analysis report that includes summaries by Dewey numbers, balanced Dewey comparisons, collection by year, age sensitivity, aged titles, and incomplete records;
- Aggregate analyses that allow you to compare the library collections of schools within a district;
- Quick searches of materials by Dewey number by clicking on the magnifying glasses in your report.

Titlewise Updates
Updates to the district reports in Titlewise are done once every year during the last week of July. The report is updated for all active school libraries in the district.

Additional updates are run for schools that have completed a scheduled library inventory for that school year, and for any school that has done a major weeding of their collection with our Collection Development Department. No other requests for individual school Titlewise updates will be considered or processed.
**Collection Assessment Rubric**

**Material Selection**
A strategic selection program is the best way to meet the needs of the students, faculty and the curriculum, so that the collection reflects current interests and changes in the curriculum. Selections should be made from professional reviews and data gathered from user needs and the collection assessment. **Items selected should be listed in a standard guide, professional review source, or reviewed and recommended by district staff.** Items that do not meet these criteria should be personally reviewed before being placed in the collection. Publishers’ catalogs and advertisement do not fit the category of professional selection tools. The school librarian must take many factors into consideration when selecting materials for acquisition. Materials should be selected that:

- Support one or more of the goals stated by the district and school.
- Are age-appropriate.
- Are positively reviewed.
- Provide a diverse, multicultural collection in order to:
  - Encourage healthy self-concepts.
  - Celebrate diversity and eliminate biases and stereotypes.
  - Provide culturally relevant materials.
  - Support individual language development.

**Guidelines for Evaluation**

**MAGAZINES**
Magazines (both print and electronic) should be selected based on:
- Appeal – Does it appeal to students of various interests and abilities? If the appeal is limited, is it still needed?
- Is it appropriate in style, content, and reading level for the type of school.
- Does it offer multiple viewpoints or is it always a one-sided presentation?
- Is the information accurate?
- Does the magazine have reference value?
- Is it free from racial, ethnic, or gender bias?
- Is the format attractive?

**BOOKS**
Books (print or digital) should be selected based on:
Fiction
- Theme – Is it relevant? Is it universal? Is it appropriate?
- Characterization – Is it realistic? Are characters flat or stereotyped? Are loaded adjectives used that are demeaning to a person's race, religion, gender, or ethnicity?
- Point of view – What are the points of view and the author's perspective?
- Setting – Does the description of the setting make you feel you're there?
- Plot – Is it interesting? Is it well knit? Does it hold your interest?
- Style – Is it effective? Is the story well told? Are the conversations realistic, the descriptions good and original?
- Appropriateness – What is the intended audience age level?
- Format – Consider size of printing, quality of material. Do the illustrations, if there are any, add to the story?
- Reviews – Is it positively reviewed in recognized reviewing sources such as Scholl Library Journal, Booklist, Horn Book, etc.?

Non-Fiction
- Authority – of the author and publisher. Is the author someone with a reputation in the field or someone who can be trusted to do research before writing? Is it a reputable publishing firm?
- Currency – Does the book present up-to-date information?
- Treatment – Is it brief or exhaustive? Is it balanced? Does it reflect any bias? Is it written so students of the appropriate age level can understand it?
- Subject matter – Does it meet the curricular or independent reading needs of students? Is it balanced? Does it present facts? Is it true to life or to possible life situations?
- Format – Consider the size and quality of print, layout, binding and illustrations.
- Appropriateness – Is it age and grade appropriate?
- Review – Is it positively reviewed in recognized reviewing sources?
- Features – Are there valuable features that make the information easier to use such as contents, index, glossary, links, and notes?
DIGITAL FORMATS

All digital formats should be selected based on:

- Is there a curriculum connection or an independent reading purpose?
- Authority – Purpose – Is it accurate? Impartial? Up-to-date? What is the research credibility of the author or publisher in other formats?
- Appropriateness – Is the vocabulary appropriate to the age level?
- Scope – How comprehensive is the content and concepts presented?
- Interest – Is it credible? Does it appeal to the imagination? Will it engage the interest of the students for whom it was chosen?
- Organization – Is it logical? Well balanced?
- Technical aspects – Is it easily accessed and is the quality good?
- Special features – Are there accompanying indexes, notes, guides etc., and are they worthwhile? Is it possible to access material from school and home?
- Review – Is it positively reviewed in recognized reviewing sources?

The advent of digital technologies has changed the ways students’ access information. Students may now locate and use electronic information resources that have not been screened by educators. This is in keeping with individual rights to freedom of information but it entails a responsibility for staff to guide and instruct students on analyzing and evaluating these resources for appropriate use throughout the curriculum. Students are responsible for proper use of telecommunications and electronic information resources. They must submit an Internet Use Agreement developed by the Department of Educational Technology and Library Services (ETLS) in order to have independent access. Any student who fails to abide by the terms of the agreement will lose access to the network.

Donations

Donated materials may be accepted as long as they meet the selection criteria listed above for purchased materials.

Selection Tools

Librarians do not have time to actually read or preview each item they wish to purchase, so we must rely on the work of professional reviewers. Reviews are available in many print and electronic journals such as Booklist, School Library Journal, and Horn Book, etc. Fortunately our two preferred providers for library resources, Baker & Taylor and Follett, have electronic tools that give access to full text reviews.
TitleSource 3 (TS3)

TitleSource 3 (TS3) from Baker & Taylor is a powerful tool that can help you find resources that meet your library’s needs. It contains selection lists and reviews. In addition you can use the filters in the tool to select materials by age, language, reading level, etc. TitleSource is available at: http://schoollibrary.btol.com.

Titlewave

Library staff members also have access to Titlewave with access to the K–Adult books and curriculum–related audiovisual materials available from Follett. Titlewave’s search tool helps find possible library materials and the reviews, recommendations, or awards for those materials. Titlewave is available at: http://www.titlewave.com/login/

The username and passwords for these tools are available on the Librarian Dashboard. Contact Library Services for training on how to use TS3 and Titlewave.
Weeding
The school library is not an archive, it is a living collection that meet the specific goals and needs of the school district. The overall goal for collections in the school libraries of the Denver Public School is to have a well maintained collection of relevant materials with an average age of less than ten years of the current date. Schools whose collection average age exceeds 15 years will be placed on the “Must Weed” list and the library staff must schedule time to complete the weeding process. The average age of the collection is available in the TitleWise report for the school.

Why You Should Weed?
Weeding is an important part of the collection development process in a school library. Removing materials that are damaged, inaccurate, not circulating, or no longer useful is as important as the purchase of new materials. School library staff should work continuously to remove these items from their collection.

Weeding Procedure
The CREW (Continuous Review, Evaluation, and Weeding) method is the recommended guide for directing this work. The entire guide is available at: CREW: A Weeding Manual for Modern Libraries. DPS general weeding guidelines based on the CREW method are available on the Collection Development portion of the ETLS website. Library Services Collection Development staff is available to consult with school staff on this process.

Discarding Books
After weeding items from your collection using the guidelines in this manual, follow this procedure to dispose of your weeded materials:

1. Weeded items must be withdrawn from the inventory. See “Withdrawing Items” in the Library Manual for the procedure.
2. Place the items in a box and label it: “LIBRARY RESOURCES FOR DISCARD”. Each box should weigh no more than 50 pounds.
3. Email Jeff Stephens (jstephens@textbookfare.com), and request a pick-up for your location. cc: Brandy Burdick (Brandy_Burdick@dpsk12.org) on the email.
4. Always specify the number of boxes you have for pickup, and the location of the boxes at the school. Boxes should be in an easily-accessible, first-floor location.
5. Jeff Stephens will confirm receipt of your email within 72 hours, and he will arrange a date and time for pickup. At the beginning of the school year he is extremely busy and may not be able to respond within 72 hours. If you don’t hear from Jeff within a week you can follow up with Brandy Burdick.
6. Follett Educational Services does occasionally purchase discarded textbooks from schools, but **they do not purchase discarded library books**.

7. If you have concerns, or for more information contact Brandy Burdick, 720-423-1849 at Library Services.

**Inventory**

Each school in the district, that is part of the LION system, is **required** to do a complete inventory of their library collections **every 4 years**. Check the ETLS (Library Services Section) website or your Librarian Dashboard to find the yearly schedule of libraries that must do inventory. ([Must Inventory List](#))

**Inventory (At–A–Glance)**

- Check to see if your school is scheduled to do inventory
- Notify the Helpdesk to schedule your start date
- Your collection is changed to inventory status
- Pick up the scanners and receive training at Library Services
- Begin scanning all “on–shelf” items in your library
- Return scanners to Library Services when done scanning
- Inventory reports are sent to you from Library Services
- Verify and confirm data on inventory reports
- Missing items are deleted and Titlewise reports are updated

**Inventory Benefits**

Some of the benefits of doing a library inventory are:

- Reduces the frustration of patrons when looking for items that may be missing from your collection.
- It brings the average age of the collection within the district guideline of ten years from current date.
- Assists library staff in determining replacement purchases.
- Improves the quality of your library holdings.
- Improves the accuracy of your holdings in Titlewise.
- Removes lost and long overdue items from your collection.
- Saves staff time in locating and shelving materials.
- Makes room for new technologies.
**Scheduling an Inventory**
If your school is on the inventory schedule, you must notify the Library Services Helpdesk with the **specific date** you want to start your inventory. Once the Library Services Helpdesk has received and scheduled your request, we will send confirmation to you via e-mail.

**Equipment**
Once you’ve scheduled your inventory with the Helpdesk, Library Services will reserve a minimum of 2 portable barcode scanners for your school. If you have recruited volunteers to assist you with your inventory, you can request additional scanners. You can pick–up Inventory scanners at Library Services up to a week in advance of your inventory or the morning of your inventory. If it is not possible for you to make it to Library Services, we will arrange to have the scanners delivered to your school.

**NOTE**: Please be aware that the availability of additional scanners may be limited due to the number of schools doing inventory at any one time.

**Preparation**
To prepare your school for inventory, a process on LION is run, by Library Services, to convert the status field in the item records to "Inventory" and update the inventory date field (**INVDA**) on all "on–shelf" items in your collection. This process runs the evening before or the morning of your inventory. Below are other areas that are included in preparing a site for inventory:

**Checked Out Items during inventory**
Checked out items are included in your inventory and accounted for. We do not change the status on checked out items, but we do update the inventory date field in the item records. It is not necessary to scan these items. If students are returning checked out materials, check them in as you normally would in Sierra. This includes any materials returned in your library bookdrops.

**Books on your Hold Shelf**
If you have books on the hold shelf from your collection, the status of the item records is changed to “inventory” and you will need to scan them. The inventory process does not affect the hold queues in Sierra so patrons will not lose any hold requests.

**Items included in the inventory process**
**All** materials are included in the inventory process. This includes textbooks and Teacher Resource room books. You must scan all barcoded items in your library that you wish to keep in your collection. Otherwise, the un–scanned materials will appear on your “Missing Items Report” and be subject to deletion at the end of your inventory.
Items excluded from the inventory process

Items that have not been attached to a bibliographic record in LION are not included in the inventory process. These items will show up as “Not in Database” when you scan them in Sierra. There is currently no way of tracking items with this status and they will not be included in the count of your holdings.

New books from Library Services

When processing new books for your school, Library Services puts the status on the items as “IN TRANSIT”. Books with the “IN TRANSIT” status are included and accounted for during your inventory. However, you still need to check in the items, using Sierra, to change the item status from “IN TRANSIT” to “AVAILABLE”. Do not use the portable scanners when checking in new books.

Recruiting of Volunteers

You are encouraged to actively recruit and use volunteers to assist you with your inventory. Volunteers can greatly reduce the amount of time and effort it takes to do your library inventory. Be sure to monitor your volunteers to ensure that they have scanned your entire library collection.

The Inventory Procedure

The procedure for doing a library inventory is very simple. It is comprised of the following steps:

1. Pick up the inventory scanners from Library Services
   When you pick up the inventory scanners at Library Services, we will give you a brief training session on how to use the scanners and an overview of the inventory procedure if needed.

2. Scan all of the on-shelf items in your library
   Scan all items that are currently on your shelves. Be sure to include your Reference sections, your hold shelf, and any books that you may have on display. The barcode is automatically stored when you scan it. If you have any doubt as to whether or not you scanned a book, scan it again. The scanners have plenty of memory to store your inventory data.

3. Return the inventory scanners to Library Services
   When you are finished scanning your entire collection, return the portable scanners to Library Services. Upon receipt of the scanners, we will upload all the barcodes and change the item record status from “INVENTORY” to “AVAILABLE”.

4. Receive and confirm your inventory reports.
   After your inventory data from the scanners is loaded and converted to “AVAILABLE”, Library Services will prepare and send you the following inventory reports:
► **Missing Items Report:** This report has all the items in your collection, which still have “inventory” as their status. An item will remain in “INVENTORY”:

- if the item was not scanned.
- if the “INVENTORY” status of the item was not cleared during checkout.

The Missing Items report is a large report sorted by bibliographic call number and is the most important report you will receive. We will delete all the missing items at the end of your inventory. You are not expected, or required, to check for every item on the report, but please check to make sure no section of your library collection was missed, and spot check the report for books in each call number range that may have been missed. In the event you have missed a section, you can request inventory scanners from Library Services to scan that section. If you find a book on the shelf that is on the L3015 report, check it in using Sierra and clear the “INVENTORY” status from the item.

► **Missing Items Summary Report:** This report is a summary of all the missing items by ITYPE. No action is required from you on this report.

► **Lost and Paid Items:** This is a report of all items lost by your patrons that have been paid for, either by paying the replacement cost of the item, replacing the item, or by working the fine off in the library. Library Services will remove Lost and Paid items from your collection at the end of the inventory process. No further action is required.

5. **Complete your inventory.**

Once you have reviewed the Missing Items report, and you are completely satisfied that the items listed are truly missing, notify Library Services that you wish to complete your inventory. Upon notification, we will update and delete all missing and lost & paid items from your collection.

**IMPORTANT NOTE:** Be very thorough when checking your Missing Items report before notifying Library Services! Once we have removed the items from your collection, we cannot restore them!

6. **Titlewise Update**

The final step in the inventory process includes updating your reports on Titlewise to reflect the changes in your collection from doing inventory. Library Services will send a copy of the updated Titlewise report to you Sierra e-mail. For regular district employees, this will be your Outlook email account. For charter schools, it will be whatever e-mail account you provided to Library Services. Once you receive the report, your inventory is officially completed.
Inventory – Frequently Asked Questions (FAQs)

**How long do I have to do my inventory?**
You may take as long as you need within reason. It is strongly recommended that once you start your inventory that you get it done as soon as possible.

**How many scanners do I get for my inventory?**
You will be loaned a minimum of 2 portable scanners for your inventory. If you are using volunteers to assist you, you can get additional scanners but the availability may be limited based on the number of other schools doing inventory at the same time. We will try as best we can to accommodate your needs.

**Can I weed during inventory?**
Yes, this is highly recommended! You can weed any damaged or out-of-date items during the inventory process. To weed these items from your collection, do not scan them with the portable scanners. This will leave the status of those items as “inventory” and they will appear on your “L3015–Missing Items Report”. The benefit of doing this, is that you will not have to manually change the item status to “withdrawn”, and Library Services will delete the items for you.

**Can I continue to check out books during inventory?**
You can continue to circulate items to your students while doing your inventory. However, you will be prompted with the message, “Item xxxxxx is in inventory status, do you wish to clear it?” Respond “Yes” to this prompt every time you receive it to mark the item as “available” and to remove it from the missing items list. Failure to do so could result in the item being deleted at the end of your inventory.

**Do I need to close my library during inventory?**
You are not required to close your library to do your inventory. Although closing your library may assist you in focusing on the task, and greatly reduce the number of days it takes to do inventory.

**Do I need to scan books that were checked out?**
No, you are not required to do this since all checked out items have been accounted for. Although, it won’t hurt anything if they are scanned.

**What happens if an item is deleted in error?**
You can put the item back into the database using Item Record Management procedures. If you need help with this, please contact the Helpdesk.
Can I send the scanners back to you using interoffice mail (DPS mail)?

No, you must return the scanners directly to Library Services. If you cannot make it to Library Services, notify us and we’ll arrange to have them picked up from your school. Each scanner costs approximately $500.00 and your school will be responsible for replacing it if lost or stolen.

Inventory – Best Practices

- Stay committed to getting it done! Dragging out the process over time does not make it any easier.
- Inventories are required every 4 years.
- Store the portable scanners in a secure area when not in use. The scanners look very similar to cell phones, and the temptation for them to “disappear” is high.
- Put the scanners in their charging stands when not in use. This minimizes “down-time” when doing your inventory.
- Be gentle with the scanners and try not to drop them.
- Do not plan your inventory during state-wide testing. Please schedule your inventory before or after this required testing.
- Schedule your inventory as early as possible during the school year. Do not wait until the last minute!
- Recruit volunteers! Your volunteers can consist of parents, students, or family members. Volunteers can help minimize the length of time it takes to do inventory.
- Look over and confirm the data on your inventory reports as soon as you receive them. Take this seriously as once the books are deleted they are gone unless you put them back into the system!
- Keep track of the shelf locations you’ve scanned. This helps to reduce duplication of effort from you and your volunteers.
IV. Appendix

- Circulation Training
- Busy or “In Use” Records
- Keyboard Shortcuts in Sierra
- Function Key Shortcuts in Sierra
- School Location Codes
- Item Status Codes
- Setting LION as the Default Homepage
- Equipment Ordering
  - Library Barcode Scanners
  - Library Circulation Computers
  - Library Receipt Printers
- Equipment Repair
- System Data Cleanup Schedule
  - Annual Events
  - Monthly Events
  - Daily Events
  - As Needed Events
Circulation Training
Circulation training is provided by Library Services. Check the [Library Services website](#) for class times and availability. While most classes are geared toward the new librarian, veteran librarians are encouraged to take classes as a refresher to their existing skills and knowledge, or as an efficient way of becoming familiar with new features and functions in Sierra. Contact the [Library Services Helpdesk](#) for more information.

Busy or In Use Records
"Busy" or "In Use" records are when a record is in use by another process or user on the system. They will typically clear themselves after a few seconds. However, if the record is still busy, make note of the complete record number and send it to the Library Services Helpdesk. Each record type can be identified by the letter in front of the number. The record types are:

- .b1234567 = Bibliographic Record
- .l1234567 = Item Record
- .p1234567 = Patron Record

For example, if you receive the message, "Record b1234567 in use by system". You would send the record number "b1234567" to the [Library Services Helpdesk](#) to have it cleared manually. The helpdesk will notify you, through e-mail, when the record is cleared.

Keyboard Shortcuts in Sierra
The following keyboard shortcuts are available to you in Sierra:

- **ALT+Q** – Closes the current record.
- **CTRL+S** – Saves the current record if you are creating a new one or if you have it open for editing.
- **CTRL+SHIFT+E** – Displays the full patron record for editing once you’ve retrieved it from the system.
- **CTRL+P** – Prints the current record you have displayed in Sierra to your library printer.

Function Key Shortcuts in Sierra
The following function key shortcuts are available to you in Sierra:

- **F11** – Displays the patron barcode prefix (2713700).
- **F12** – Displays the item barcode prefix (371370)
School Location Codes
You can view the current district location codes for schools in your Librarian Dashboard or on the district website.

Item Status Codes

<table>
<thead>
<tr>
<th>Code</th>
<th>Meaning</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>–</td>
<td>AVAILABLE</td>
<td>System assigned value for items that can circulate and are not checked out.</td>
</tr>
<tr>
<td>m</td>
<td>MISSING</td>
<td>System-assigned code added to item during claims return process.</td>
</tr>
<tr>
<td>n</td>
<td>BILLED</td>
<td>Overdue item that has reached last level and a replacement charge was added to the patron’s record. Synonymous to “LOST” status.</td>
</tr>
<tr>
<td>z</td>
<td>CLMS RETD</td>
<td>A Claims Return has been placed on the item.</td>
</tr>
<tr>
<td>t</td>
<td>IN TRANSIT</td>
<td>Item is in transit from one location to another. This is normal status for books that have been processed by Library Services and sent to your school. Please remember to check in the items to clear the status.</td>
</tr>
<tr>
<td>$</td>
<td>LOST AND PAID</td>
<td>A lost item that has been paid for by the patron.</td>
</tr>
<tr>
<td>!</td>
<td>ON HOLDSHELF</td>
<td>A request that has been received by the requesting library.</td>
</tr>
<tr>
<td>w</td>
<td>WITHDRAWN</td>
<td>Item was manually withdrawn/weeded from the database.</td>
</tr>
<tr>
<td>i</td>
<td>INVENTORY</td>
<td>Item status when site is in the process of doing a scheduled school library inventory.</td>
</tr>
</tbody>
</table>
Setting LION as the Default Homepage

**Internet Explorer**
1. Open Internet Explorer.
3. On the **Tools** menu, click **Internet Options**.
4. Click the **General** tab.
5. Under the “Home Page” box, click the “**use current**” button.
6. Click **OK**. Restart your browser. LION should now be your default homepage.

**Firefox**
1. Open Firefox.
3. On the Firefox menu bar, click “**Tools**”.
4. Next click “**Options**”.
5. Select the **General** tab. Under “**Home Page**”, click “**Use Current Pages**”.
6. Click **OK** and restart your browser. LION should now be your default homepage.

**Safari**
1. Open Safari.
3. On the Safari menu bar at the top of your screen, click “**Safari**”.
4. Next click “**Preferences**”.
5. Select the **General** tab. Under the “**Home Page**” section, click “**Set to Current Page**”.
6. Close the Preferences window and restart your browser. LION should now be your default homepage.
Equipment Ordering
In this section you will find ordering information for the following items:

Library Barcode Scanners
Library Circulation Computers
Library Receipt Printer

Library Barcode Scanners
Barcode scanners are purchased by the schools. Library Services will **NOT** buy or order them for you.

To order a new barcode scanner for your library, follow these procedures:

1. Click here to go to the district's equipment ordering page.
2. About halfway down the page you should see the ordering information for the "Metrologic Voyager MS9540 Part #MK9540-72A38"
3. Feel free to print that page and present it to the person responsible for ordering the equipment through LAWSON.

The Metrologic Voyager has a USB (flat rectangular shape) connector (See below). Your computer must have at least one open USB slot.

Once the scanner has been ordered and received by your school, setup is easy. Just assemble the stand, log in to Windows, and plug the scanner into any available USB port on your computer. (**No additional software or drivers are necessary.**) After a few seconds, the scanner will power on and beep. Once this occurs, the scanner is ready to use. Contact the Library Services Helpdesk if you have any problems with the installation of your Metrologic scanner.

**NOTE:** While you are free to purchase other scanner makes and models, please be aware that they will not be supported by Library Services.
**Circulation Computer**

The responsibility for ordering or replacing a circulation computer lies strictly with the schools. Library Services will **NOT** purchase the computers for you, nor will we do the initial setup of the equipment.

**To order a new circulation computer, follow this procedure:**

1. Click the following link to begin: [Search for Computer Pricing Information](#). You can use any of the current Dell or Apple desktop computers listed on the site. LION is supported on either of these platforms.
2. Next, you, or the person responsible for ordering the computer, will need to generate an electronic quote (E-quote/Proposal) from Dell or Apple to facilitate ordering the machine. Click below to go to Dell's website: [Dell Premier Website](#) or the [Apple Store for Resellers](#).
3. Once there, you will need to log in using your personal profile in order to generate an E-quote or proposal. If you do not have a personal profile, contact the [DoTS Hotline](#) at 720.423.3888 to request one.
4. After you have created the E-quote/Proposal, you can then order the computer using the LAWSON financial system.
5. When the computer arrives at your school, have your School Tech Representative (STR) setup and configure your computer for use on your school’s network.
6. After the computer has been setup by your STR, notify the [Library Services Helpdesk](#) to have the Sierra software installed. Please send us the computer name or IP address of the machine so that we can remotely install Sierra. If unsure on how to find this information, contact your STR.

**Replacing Your Circulation Computer**

In the event that your school cannot afford to purchase a new computer for your library, your STR can replace the computer with a newer from your school, if there is one available. Your STR is responsible for the initial setup of the computer. Once the computer is in place in your library, contact the [Library Services Helpdesk](#) to have the Sierra Desktop App installed.

**Library Receipt Printer**

You can now order receipt printers for your library circulation and self check out computers. You can find the ordering information on the district’s [Tech Purchasing Calculator](#) webpage. Contact Library Automation regarding the printer setup for your Sierra computer.
**Computer/Equipment Repair**

Contact your on-site School Technical Representative (STR) concerning any computer problems. If a DoTS technician is required for on-site troubleshooting, contact the **DoTS Hotline** at 720-423-3888.

If the problem is hardware-related and requires repair, the DoTS technician will advise the site of its options. The site can proceed to initiate the repair work order with an authorized contract vendor (See DPS Contract Vendor section below) or a Dell, Apple or HP authorized service provider of their choice. A sample repair form is available.

Equipment under warranty **MUST** be taken to an authorized Dell, Apple or HP repair facility.

**NOTE:** The DPS Contract Vendor can accept Contract Releases (CRs). Equipment manufacturers or other service providers can accept petty cash checks and credit cards but not CRs. The chosen vendor will invoice each individual site.

**DPS Contract Vendor for Repairs:**

NETBUILDERS, INC.
Service Dispatch Work Orders
Telephone: 303.922.0481
E-mail# Netbuilders@idcomm.com
Fax: 303.922.0704
Rate: $70.00/hr

Equipment they can repair:
Dell Computers
Apple Computers
HP Printers

**Manufacturer Service Support**

Dell Computer Service 888.977.3355
Apple Computer Service 800.800.2775
Hewlett Packard Service 800.633.3600
# System Data Cleanup Schedule

Below are the data cleanup events that are performed by Library Automation during the school year. The majority of these events are done to remove old or missing data items from the LION database to improve searching in the online catalogs.

## Annual Events:

<table>
<thead>
<tr>
<th>Event</th>
<th>Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Export/FTP Holdings data to Follett Titlewise</td>
<td>Mid-July.</td>
</tr>
<tr>
<td>Delete Long Overdue Items</td>
<td>End of August.</td>
</tr>
<tr>
<td>Delete Expired Patrons</td>
<td>End of September.</td>
</tr>
<tr>
<td>Delete Missing/Claims Returned Items</td>
<td>End of school year.</td>
</tr>
<tr>
<td>Clear Hold shelf</td>
<td>End of school year.</td>
</tr>
<tr>
<td>Delete/Archive Order records</td>
<td>End of fiscal year.</td>
</tr>
<tr>
<td>Reset YTD circulation stats in item records</td>
<td>End of school year.</td>
</tr>
<tr>
<td>Change Sierra Password</td>
<td>During summer break.</td>
</tr>
<tr>
<td>Update Item/Patron record templates</td>
<td>End of school year.</td>
</tr>
</tbody>
</table>

## Monthly Events:

<table>
<thead>
<tr>
<th>Event</th>
<th>Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete Withdrawn Items</td>
<td>End of each month.</td>
</tr>
<tr>
<td>Delete Lost &amp; Paid Items</td>
<td>End of each month.</td>
</tr>
<tr>
<td>Clear Autonotice Log</td>
<td>End of each month.</td>
</tr>
<tr>
<td>Import Staff data from LAWSON</td>
<td>Beginning of each month.</td>
</tr>
</tbody>
</table>

## Weekly Events:

<table>
<thead>
<tr>
<th>Event</th>
<th>Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete duplicate item records</td>
<td>Every Friday morning.</td>
</tr>
</tbody>
</table>

## Daily Events:

<table>
<thead>
<tr>
<th>Event</th>
<th>Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Import Patron Data from Infinite Campus</td>
<td>Daily @ 5:00 AM.</td>
</tr>
<tr>
<td>Backup Sierra server</td>
<td>Every Monday–Friday.</td>
</tr>
<tr>
<td>Backup Encore server</td>
<td>Every Monday–Friday.</td>
</tr>
</tbody>
</table>

## As Needed Events:

<table>
<thead>
<tr>
<th>Event</th>
<th>Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete Missing Inventory Items</td>
<td>At the end of a school inventory.</td>
</tr>
<tr>
<td>Update WAM forward table</td>
<td>Review at end of school year.</td>
</tr>
</tbody>
</table>

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Last Updated: August 31, 2015  
Version 2.2.2