LAKELAND LIBRARY COOPERATIVE
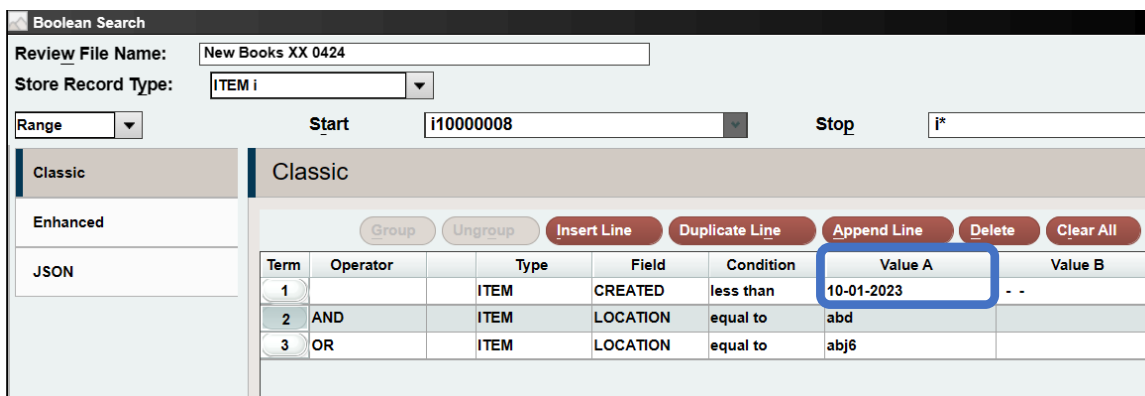### LEADING • LEARNING • LENDING

New Books No Longer New

Created 1/31/24

Create List Procedure

1. In the last two weeks of the month, use the Create Lists functions to search for materials at your library who've been in the new books location for 6 months or more and change their itype and location so they will circulate normally.

2. In Sierra, choose the Create Lists function. Choose an empty Review File with 1,000 or 5,000 records. Click **Search Records**.

3. Change **Store Record Type** to **ITEM-i**.

4. In **Review File Name**, give the file a title, such as XX New Books MMYY where XX is your library's 2 letter code and MMYY are the month and the last two digits of the year.

5. Click on JSON in the column on the left side of the window. Delete the {} in the blank area of the screen. Open the Word document with the JSON coding that was given to your library. Copy all of the code (CTRL+A, CTRL+C) from the document. In Sierra's JSON screen, paste (CTRL+V) the code.

6. Click on the Classic button on the left column.

7. In line 1 of the search parameters, change Value A's date to 6 months before.

8. Click **Search**.

9. When the search Status is complete, click on your review file line and click **Sort Records**, then click on **Apply Saved Sort**. Select **LL-Sheryl Monthly reports**, then click **Sort**.

10. When the review file finishes sorting, export the results by selecting its line, then click the **Export Records** button. Click **Applied Saved Export**, then click on **LLC New Books**, then click **Select**.

11. Click the **Browse** button next to the File box and choose a location on your computer to save the exported file. Name the file; for example, you could use newbooks-mmyy-xx, where mmyy is the month and year, and xx is your library's 2 letter code. **Click Save**. Then click **OK** and the file will begin exporting.

12. Open Excel after the file has been exported. Depending on your version of Excel, there may be some variation in the following steps.

13. Select the **Data** tab > **From Text/CSV** > [Find your saved export file]

14. File type is **Delimited**. Click Next.

15. Select what you used as the delimiter, usually either tab (|) or a comma (,).

16. *Older versions of Excel*: the text qualifier must be set to double quotation mark. Click Next. Leave data format as **General**. Click Finish. Click **OK** if you are okay with it loading in the current worksheet. *Newer versions of Excel*: if the above options aren't given, click on **Load**.

17. If the barcode or other numerical columns shows formulas instead of numbers, right click on the entire column, select Format Cells > Number > Decimal places: 0.

18. Save your Excel file locally and in Sierra manually update the itypes and location with codes identifying them as new as needed on the items listed to their regular collection codes.

19. In Sierra, empty your Review File. Click on its line then click the **Empty** button.