



SERIALS WORKSHOP

November 6, 2017



Introduction

Sierra contains various functions to maintain your library's serials, including:

- Journals, periodicals, and newspapers
- Monographic series (travel books, reference directories, etc.)

Terminology:

- **Checkin record:** a record attached to a serials bibliographic record; contains information about the library's holdings of that serial
- **Checkin card:** the part of the checkin record that contains the status of individual issues.
- **Checkin card box:** An issue in a Checkin card
- **Current box:** The Checkin card box of the next issue.
- **Routing list:** the list of individuals to whom a particular serial is routed
- **Routing record:** an entry for an individual in the routing file; contains information about the individual plus the list of serials that are routed to him or her*
- **Routing slip:** printed list of individuals to whom a particular copy of a serial is routed

Record Fields

b41208237

TITLE Food network magazine.

PUBLISHER New York, NY : Hearst Communications Inc., 2008-

Summary

Record c17009376

Card c17009376

Holdings c17009376

Routing 0

Bib-Level Holds 0

View

| # | Record Number | LOCATION | IDENTITY | STATUS | FREQUENCY | BOXES | ROUTING |
|-------------------------------------|---------------|--------------|----------|---------|-----------|-------|---------|
| 1 | c32009902 | Other: BABL | | | | | |
| 2 | c11005129 | Other: BRENT | | | | | |
| 3 | c28014686 | Other: HALF | | | | | |
| 4 | c19013103 | Other: NPENP | | | | | |
| 5 | c15006803 | Other: HARBO | | | | | |
| 6 | c36006786 | Other: ISLIP | | | | | |
| <input checked="" type="checkbox"/> | 7 c17009376 | lwasc | | Current | Monthly | 22 | |
| 8 | c28014881 | Other: HALF | | | | | |
| 9 | c18009141 | Other: MASTI | | | | | |

There are 6 tabs on the Bibliographic record when the Checkin Record is highlighted in the record view display

Record Fields

| Summary | |
|-----------------|-----------|
| Record | c17009376 |
| Card | c17009376 |
| Holdings | c17009376 |
| Routing | 0 |
| Bib-Level Holds | 0 |

| Summary | | |
|----------------------------------|---------------|--------------|
| View | c Checkin ▼ | |
| # | Record Number | LOCATION |
| <input type="radio"/> | 1 c32009902 | Other: BABL |
| <input type="radio"/> | 2 c11005129 | Other: BRENT |
| <input type="radio"/> | 3 c28014686 | Other: HALF |
| <input type="radio"/> | 4 c19013103 | Other: NPENP |
| <input type="radio"/> | 5 c15006803 | Other: HARBO |
| <input type="radio"/> | 6 c36006786 | Other: ISLIP |
| <input checked="" type="radio"/> | 7 c17009376 | lwasc |
| <input type="radio"/> | 8 c28014881 | Other: HALF |
| <input type="radio"/> | 9 c18009141 | Other: MASTI |
| <input type="radio"/> | 10 c31004271 | Other: NBAB |
| <input type="radio"/> | 11 c19012573 | Other: NPENP |

1. **Summary** tab: View a summary list of all Holdings records attached to the bib
2. **Record** tab: Displays the Checkin record includes the fixed-length and variable-length fields associated with the selected Checkin record.
3. **Card** tab: Displays the Checkin card for the record. Contains boxes for each individual issue of that serial
4. **Holdings** tab: Displays holdings information (the volumes or issues in the collection)
5. **Routing** tab: Lists the individuals to whom this serial is routinely routed (optional)
6. **Bib-level holds** tab: place or view holds for that particular item

Checkin Record Display

The Checkin Record has location, frequency, vendor and holdings detail. A Checkin record is required to create a Checkin Card

b45685630

TITLE Wreck diving magazine.
PUBLISHER Taylors, SC : Wreck Diving Magazine, LLC, [2005-]
LOCATIONS lwasc, lwafc
NOTE SUBSCRIPTION RENEWED (09/01/15)

| | |
|-----------------|-----------|
| Summary | |
| Record | c17006855 |
| Card | c17006855 |
| Holdings | c17006855 |
| Routing | 0 |
| Bib-Level Holds | 0 |

Record

c17006855 Last Updated: 02-22-2016 Created: 08-17-2012 Revisions: 20

| | | | | | |
|------------|-------------|----------|----------------------------------|----------|-------------|
| LABEL TYPE | n NO LABEL | LOCATION | lwasc LW-Periodicals | UPDCNT | i INCREMENT |
| SCODE1 | q QUARTERLY | RLOC | j LONG | PCOUNT | 12 |
| SCODE2 | - --- | VENDOR | ebSCO Ebsco Subscription Service | ECHECKIN | |
| COPIES | 1 | SCODE3 | - --- | | |
| CLAIMON | 03-01-2016 | SCODE4 | p PERIODICAL | | |

MARC Leader ##### n y 2 2 ##### 3 n 4 5 0 0

LIB. HAS NEW SUBSCRIPTION

NOTE SUBSCRIPTION RENEWED (09/01/15)

Fixed-length fields contain a specific code, numeric or alphabetic, which is selected from a set of valid codes for that field. Fixed-length fields are not repeatable.

Variable-length fields are repeatable. Some fields have a specific use and are automatically generated by the system (Routing fields). Other fields, (Note), are available for free text.

Checkin Card Display

b45685630

TITLE **Wreck diving magazine.**

PUBLISHER **Taylor, SC : Wreck Diving Magazine, LLC, [2005-]**

LOCATIONS **lwasc, lwafc**

NOTE **SUBSCRIPTION RENEWED (09/01/15)**

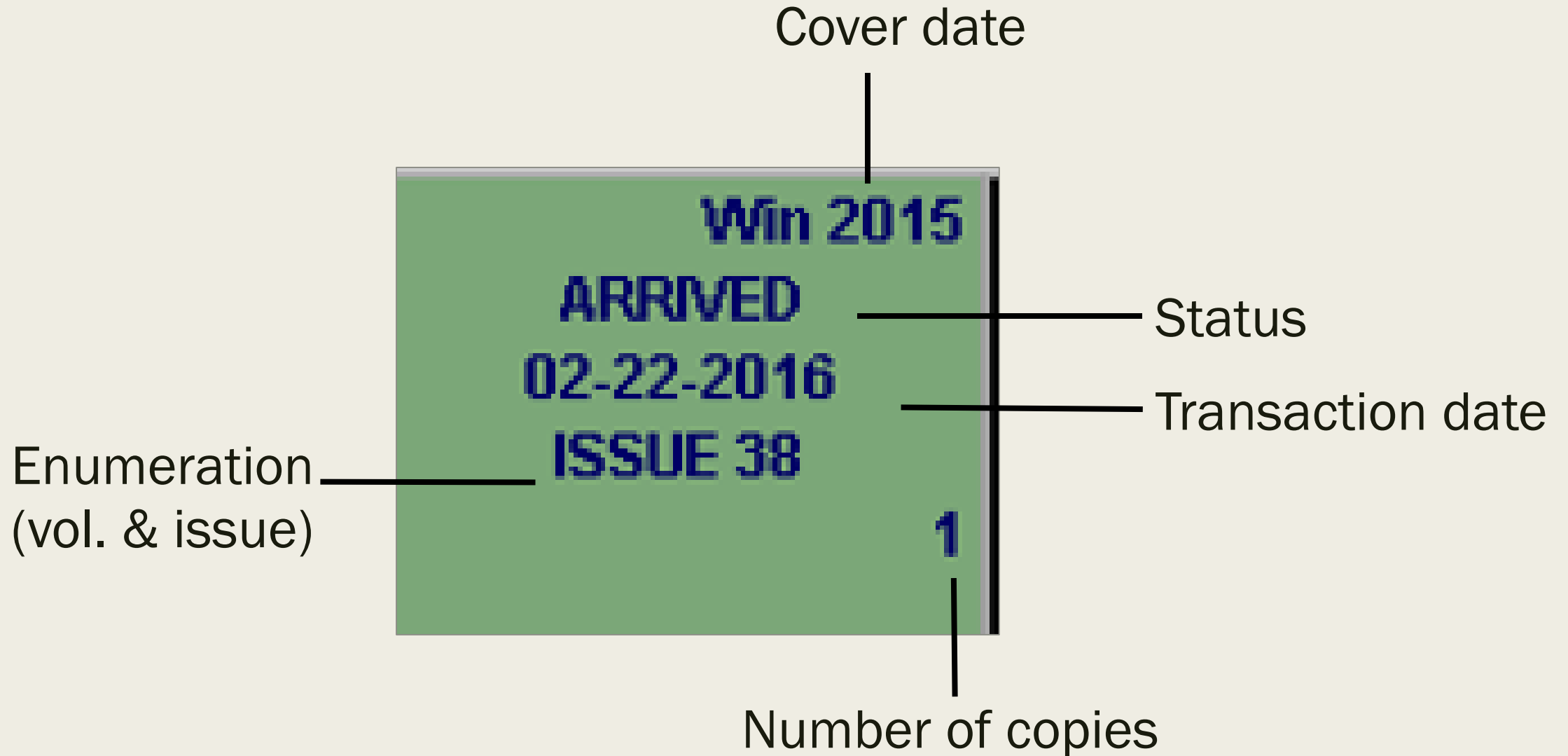
| | | | | | | | | |
|-----------------|-------------|--|--|--|--|--|--|--|
| Summary | Card | | | | | | | |
| Record | c17006855 | | | | | | | |
| Card | c17006855 | | | | | | | |
| Holdings | c17006855 | | | | | | | |
| Routing | 0 | | | | | | | |
| Bib-Level Holds | 0 | | | | | | | |

Check-in date Create item

| | | | | | | | |
|--|--|--|------------------------------------|--------------------------------|--------------------------------|------------------------------------|------------------------------------|
| Sum 2015 ARRIVED 07-27-2015 ISSUE 36 1 | Fal 2015 ARRIVED 11-17-2015 ISSUE 37 1 | Win 2015 ARRIVED 02-22-2016 ISSUE 38 1 | Spr 2016 LATE 03-01-2016 | Sum 2016 LATE 06-01-2016 | Fal 2016 LATE 09-01-2016 | Win 2016 EXPECTED 12-01-2016 | Spr 2017 EXPECTED 03-01-2017 |
| Sum 2017 EXPECTED 06-01-2017 | Fal 2017 EXPECTED 09-01-2017 | Win 2017 EXPECTED 12-01-2017 | Spr 2018 EXPECTED 03-01-2018 | | | | |

The Checkin card contains parameters such as cover date, anticipated arrival date of an issue, enumeration (piece numbering and format), frequency, claiming period, and binding information, among other pieces of information

Checkin Box



Holdings Display

b11017752
Title WW magazine.
Locations [REDACTED]

| | |
|-----------------|-----------|
| Summary | |
| Record | c10012710 |
| Card | c10012710 |
| Holdings | c10012710 |
| Routing | 0 |
| Bib-Level Holds | 0 |

Holdings

Merge with Previous Add New Range Delete Advanced Mode

OPAC View

Issues Supplements Indexes

Latest year--Current Issue Does Not Circulate.

Latest year--Current Issue Does Not Circulate.

Pulls information from the Checkin Card. Displays in the WebPAC

Holdings Display

Patrons can click *Latest Received*

le WW **magazine**.
nt Stamford, CT : World Wrestling Entertainment, Inc.

Magazine New

| | |
|--------------------------|--|
| Call No. | TEEN WW MA |
| Holdings | 1 year--Current Issue Does Not Circulate. |
| Latest Received : | October 2014 no.105 |
| Call No. | TEEN WW MA |
| Holdings | Latest year--Current Issue Does Not Circulate. |
| Latest Received : | October 2014 no.105 |

| Copies | Location | Call No. | Status |
|--------|------------------|------------------------------------|---------------------|
| | -Teen Periodical | T PER WW MA no.102 Jul 2014 | AVAILABLE |
| | -Teen Periodical | T PER WW MA no.103 Aug 2014 | AVAILABLE |
| | -Teen Periodical | T PER WW MA no.104 Sep 2014 | AVAILABLE |
| | -Teen Periodical | T PER WW MA no.105 Oct 2014 | AVAILABLE |
| | Teen Territory | T PER WW MA no.73 Jan 2012 | DUE 03-29-12 BILLED |
| | Teen Territory | T PER WW MA no.74 Feb 2012 | AVAILABLE |

Checkin Card information displays in the WebPAC

Holdings Display

Current Receipts Are:

| | | | | | |
|---|---|---|---|---|---|
| Jan 2013 Here on 12-17-12 85 (1 copy) | Feb 2013 Here on 01-23-13 86 (1 copy) | Mar 2013 Here on 02-25-13 87 (1 copy) | Apr 2013 Here on 03-26-13 88 (1 copy) | May 2013 Here on 04-24-13 89 (1 copy) | Jun 2013 Here on 05-28-13 90 (1 copy) |
| Jul 2013 Here on 06-25-13 91 (1 copy) | Aug 2013 Here on 07-23-13 92 (1 copy) | Sep 2013 Here on 08-22-13 93 (1 copy) | Oct 2013 Here on 09-19-13 94 (1 copy) | Nov 2013 Here on 10-24-13 95 (1 copy) | Dec 2013 Here on 11-12-13 96 (1 copy) |
| Jan 2014 Here on 12-19-13 97 (1 copy) | Feb 2014 Here on 01-31-14 98 (1 copy) | Mar 2014 Here on 03-03-14 99 (1 copy) | Apr 2014 Here on 03-25-14 100 (1 copy) | May 2014 Here on 04-18-14 101 (1 copy) | Jun 2014 Here on 06-02-14 101 (1 copy) |
| Jul 2014 Here on 06-24-14 102 (1 copy) | Aug 2014 Here on 07-21-14 103 (1 copy) | Sep 2014 Here on 08-19-14 104 (1 copy) | Oct 2014 Here on 09-24-14 105 (1 copy) | Nov 2014 Late on 10-19-14 106 | Dec 2014 Late on 11-19-14 107 |
| Jan 2015 Late on 12-19-14 108 | | | | | |

Checkin Boxes display in WebPAC

Routing List Display

b30834466

TITLE Library journal.

PUBLISHER New York : Bowker

LOCATIONS nsagm

NOTE No barcode; Reference sticker; Routed to librarians

| Summary | |
|-----------------|-----------|
| Record | c21002940 |
| Card | c21002940 |
| Holdings | c21002940 |
| Routing | 10 |
| Bib-Level Holds | 0 |

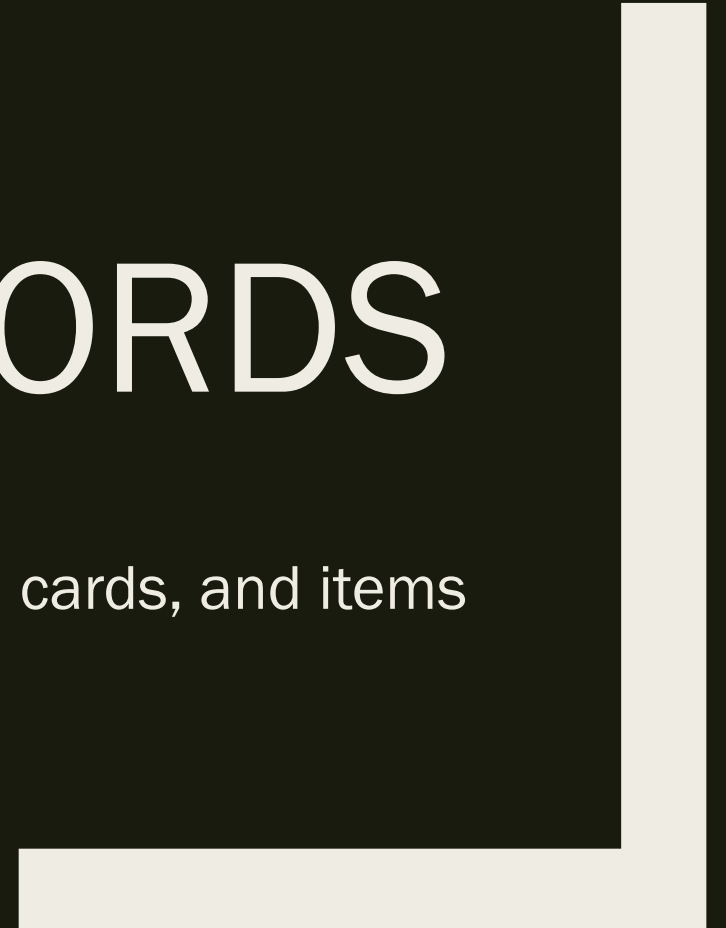
Routing

[Add](#) [Delete](#)

| Copy 1 |
|--------|
| jt |
| bj |
| ch |
| da |
| ms |
| lb |
| sr |
| kk |
| kl |
| tm |

CREATE NEW RECORDS

Checkin records, Checkin cards, and items



Create a Checkin Record

In the Serials Check-in Function:

- Search for and select Bibliographic record
- Select the Summary tab by clicking on it
- Click on the “View” dropdown menu. Select the ‘c Checkin’ line from the dropdown menu

b50258837

TITLE **Marvel super heroes magazine.**

PUBLISHER [White Plains, NY : Buena Vista Magazines, 2012-]

PUBLISHER <Jan./Feb. 2014-> : Iselin, NJ : Redan Publishing

PUBLISHER <Nov./Dec. 2015-> : Edison, NJ : Redan Publishing Inc.

Summary

Record c17009637 View **c Checkin** ▼

Attach New Checkin Delete Move Select

| Card | # | Record Number | LOCATION | IDENTITY | STATUS | FREQUENCY | BOXES | ROUTING |
|----------|---|---------------|-------------|----------|---------|-----------|-------|---------|
| Holdings | 1 | c17009637 | lwasc | | Current | Bimonthly | 24 | |
| | 2 | c26048619 | Other: PTCH | | | | | |

Create a Checkin Record

b50258837

TITLE **Marvel super heroes magazine.**

PUBLISHER [White Plains, NY : Buena Vista Magazines, 2012-]

PUBLISHER <Jan./Feb. 2014-> : Iselin, NJ : Redan Publishing

PUBLISHER <Nov./Dec. 2015-> : Edison, NJ : Redan Publishing Inc.

Summary

Record c17009637

Card c17009637

Holdings c17009637

View ▼

| | # | Record Number | LOCATION | IDENTITY | STATUS | FREQUENCY | BOXES | ROUTING |
|-------------------------------------|---|---------------|-------------|----------|---------|-----------|-------|---------|
| <input checked="" type="checkbox"/> | 1 | c17009637 | lwasc | | Current | Bimonthly | 24 | |
| <input type="checkbox"/> | 2 | c26048619 | Other: PTCH | | | | | |

Attach New Checkin **Delete** **Move** **Select**

- Click on **Attach New Checkin** and the system will ask the user to select a template or prompt to use a pre-selected template (depends on setup)
- If “Use wizard to create records” has been selected, the ‘wizard’ will guide you through the creation
- Insert values into the fixed-length and variable-length fields as prompted

Create a Checkin Record

Fill in desired fields as necessary. The location field is required. Similar to item and order records, if a checkin record is out of scope, you will not have access to edit.

The screenshot shows a library system interface for creating a checkin record. On the left, there are navigation tabs: "New Card", "New CHE...", "New Hol...", "New CHECKIN", "New Routing", and "Bib-Level Holds". The "New CHECKIN" tab is active. The main form contains the following fields:

| | | | | | |
|------------|------------|----------|--------------|------------|----------------|
| LABEL TYPE | n NO LABEL | LOCATION | none | UPDCNT | - DO NOT COUNT |
| SCODE1 | - --- | RLOC | a SCLS | PCOUNT | 0 |
| SCODE2 | - --- | VENDOR | none none | ECHECKIN | - NO MEANING |
| COPIES | 1 | SCODE3 | - --- | MEDIA TYPE | NONE |
| CLAIMON | - - | SCODE4 | p PERIODICAL | | |

Below the main form, there are expandable sections for "CALL #", "LIB. HAS", "VEN TITLE#", and "NOTE".

Two "Select" dialog boxes are overlaid on the form. The top dialog shows frequency options: ANNUALLY, BI-MONTHLY, SEMI-WEEKLY, DAILY, BI-WEEKLY, SEMI-ANNUALLY, BI-ANNUALLY, TRI-QUARTERLY, 3 TIMES/WEEK, 3 TIMES/MONTH, TRIENNIAL, MONTHLY, BIENNIAL, ODD REGULARS, QUARTERLY, IRREGULAR, SEMI-MONTHLY, 3 TIMES/YEAR, UNKNOWN, and WEEKLY. The "SEMI-ANNUALLY" option is highlighted. An arrow points from this dialog to the "LOCATION" field in the main form, which is highlighted with a red box.

The bottom dialog shows media type options: ELECTRONIC, JUV PERIOD, NEWSPAPER, JUV NEWSPAPER, PERIODICAL, YA NEWSPAPER, STANDING ORDER, SERIAL, JUV SERIAL, YA SERIAL, and YA PERIOD. The "SERIAL" option is highlighted. An arrow points from this dialog to the "SCODE4" field in the main form.

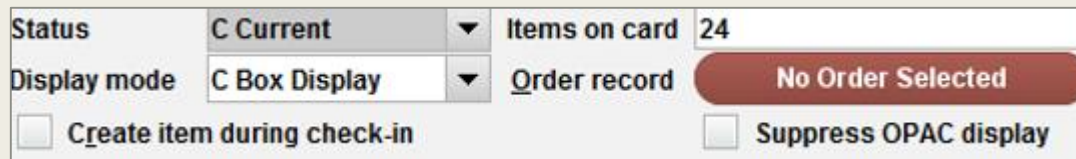
Create a Checkin Card

When all prompted fields are completed, a **Create Card** dialog box displays.

- **One** Checkin card per Checkin record.
- 120 Boxes per card
- Contains the status of individual issues
- After card creation and configuration is completed, each card will contain individual check boxes for each issue specified
- Two functions of card creation:
 - ***Simple** function consists of only two levels of enumeration, with labels for each portion expressed as, “v.” and “no” (for volume and issue number)*
 - *Advanced function includes up to 6 levels of enumeration plus two alternate enumeration levels (not recommended!)*

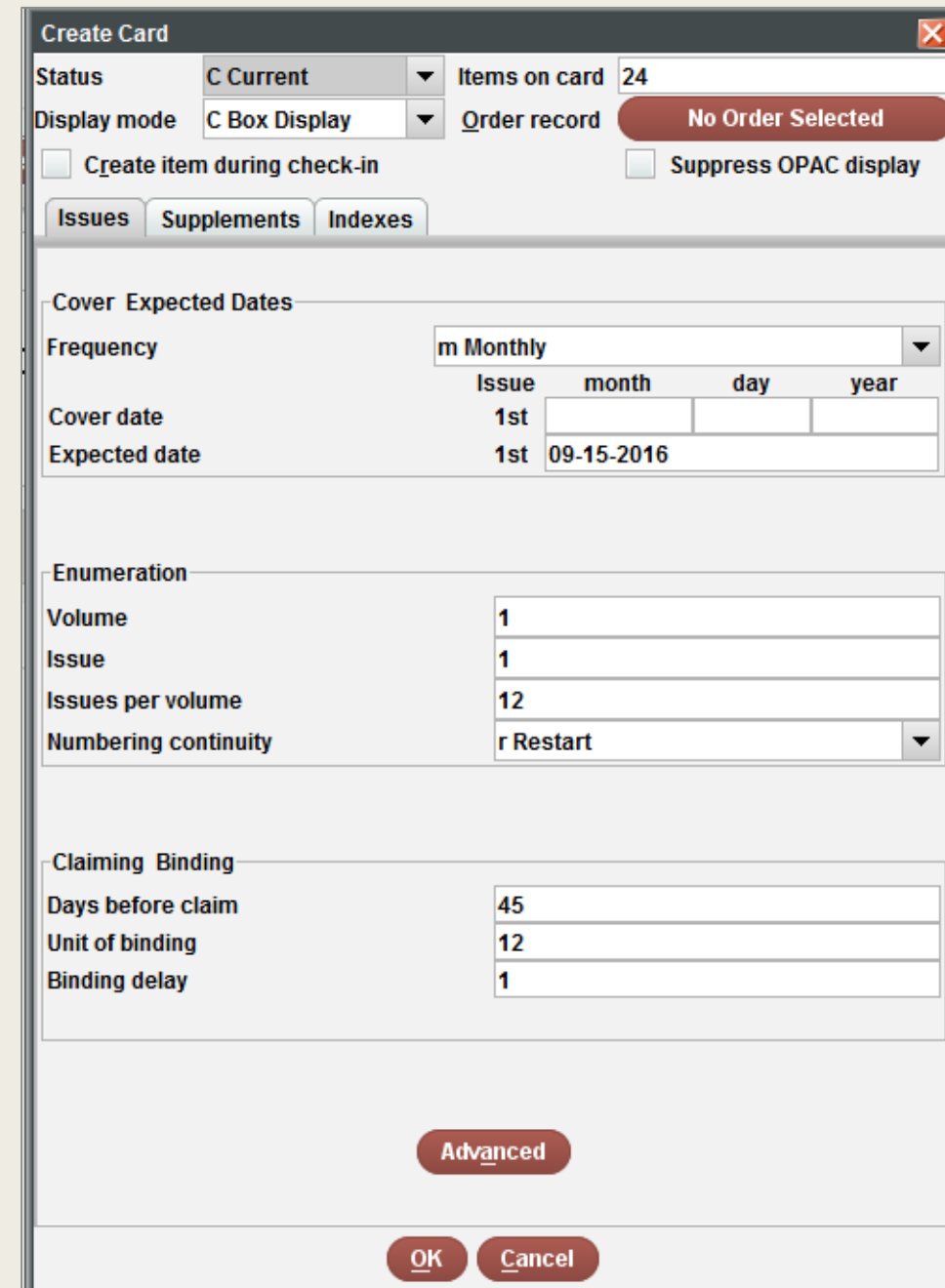
Create a Checkin Card

- Use the <Tab> key to move through the fields in the dialog box. Do not press <Enter> until all fields are completed
- Items on card: 120 boxes is max number
- *Status*: Current (C), Filled (F), Unused (U), or Archived (I)
- *“Create item”*: the system will automatically create an Item record when each issue is checked in (optional). Can be done by individual issue at Checkin
- *“Suppress OPAC display”*: remains visible in Sierra Serials, but the card is **not** visible in the WebPAC



| | | | |
|--------------------------|-----------------------------|--------------------------|-----------------------|
| Status | C Current | Items on card | 24 |
| Display mode | C Box Display | Order record | No Order Selected |
| <input type="checkbox"/> | Create item during check-in | <input type="checkbox"/> | Suppress OPAC display |

**During card creation, it is recommended that the user set up only the issues parameters. It is possible to configure parameters for Supplements and Indexes later as needed.*



| | | | |
|--------------------------|-----------------------------|--------------------------|-----------------------|
| Status | C Current | Items on card | 24 |
| Display mode | C Box Display | Order record | No Order Selected |
| <input type="checkbox"/> | Create item during check-in | <input type="checkbox"/> | Suppress OPAC display |

Issues Supplements Indexes

Cover Expected Dates

Frequency: m Monthly

| | | | |
|-------|-------|-----|------|
| Issue | month | day | year |
| 1st | | | |

Cover date: 1st

Expected date: 1st 09-15-2016

Enumeration

| | |
|----------------------|-----------|
| Volume | 1 |
| Issue | 1 |
| Issues per volume | 12 |
| Numbering continuity | r Restart |

Claiming Binding

| | |
|-------------------|----|
| Days before claim | 45 |
| Unit of binding | 12 |
| Binding delay | 1 |

Advanced

OK Cancel

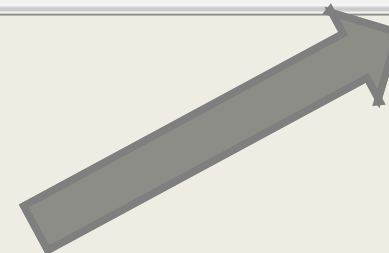
Create a Checkin Card

- “Frequency”: “Custom” and “Irregular”
 - *Annual, bimonthly, daily, monthly, quarterly, etc.*
 - *Irregular and “Regular-irregular”*
 - For example: Monday-Friday, 10/year (meaning: monthly except July-Aug), 11/year (meaning: monthly with combined July-Aug), etc.

**It is important to note that the Sierra system cannot accurately predict patterns of receiving issues which is not regular.*

| Cover Expected Dates | | | | |
|----------------------|-------|------------|-----|------|
| Frequency | Issue | month | day | year |
| m Monthly | 1st | | | |
| Cover date | 1st | | | |
| Expected date | 1st | 09-15-2016 | | |

**Extremely important information! Cover date & Expected date are used by the system to create the number of issue boxes as specified in the “Items on card” section specified above.*



Create a Checkin Card

Verify the appropriate enumeration levels and change any values as necessary.

*Extremely Important information! Used by the system to create the boxes with correct labeling and numbering.



| Enumeration | |
|----------------------|-----------|
| Volume | 1 |
| Issue | 1 |
| Issues per volume | 12 |
| Numbering continuity | r Restart |

Enter values for the starting **Volume**, **Issue**, and **Issues per volume**. This information is used by the system to create boxes with the correct enumeration. No need to type the labels (v., no., part, issue, etc.), because this is configured in the Simple or Advanced Functions discussed previously.

Numbering continuity has two options:

- Restart – use if the volume number increments after the receipt of a certain number of issues.
- Continue – use if the enumeration continues sequentially, without changing any volume numbers.

Create a Checkin Card

When all appropriate values have been configured in the checkin card, press *<Enter>* or click **Submit**. The Sierra system then considers all of the values inserted in the card creation process, and creates a Checkin Card. Configure Supplements and Indexes after Checkin Card is created.

| Card | | | | | | | | |
|--|--|--|--|--|--|--|---|--|
| Check-in date <input type="text" value="Tue Oct 18 2016"/> <input type="checkbox"/> Create item <input checked="" type="button" value="Check In"/> | | | | | | | | |
| Apr 2015 ARRIVED 03-16-2015 1 | Jul 2015 ARRIVED 06-16-2015 1 | Aug 2015 ARRIVED 07-15-2015 1 | Sep 2015 ARRIVED 08-21-2015 1 | Oct 2015 ARRIVED 09-14-2015 1 | Nov 2015 ARRIVED 10-29-2015 1 | Dec 2015 ARRIVED 11-17-2015 1 | Jan 2016 - Feb 2016 ARRIVED 12-28-2015 1 | Mar 2016 ARRIVED 02-15-2016 1 |
| Apr 2016 ARRIVED 03-15-2016 1 | May 2016 ARRIVED 04-08-2016 1 | Jun 2016 ARRIVED 05-06-2016 1 | Jul 2016 ARRIVED 06-13-2016 1 | Aug 2016 ARRIVED 07-11-2016 1 | Sep 2016 ARRIVED 08-15-2016 1 | Oct 2016 ARRIVED 09-14-2016 1 | Nov 2016 EXPECTED 10-25-2016 | Dec 2016 EXPECTED 11-25-2016 |
| Jan 2017 EXPECTED 12-25-2016 | Feb 2017 EXPECTED 01-25-2017 | Mar 2017 EXPECTED 02-25-2017 | Apr 2017 EXPECTED 03-25-2017 | May 2017 EXPECTED 04-25-2017 | Jun 2017 EXPECTED 05-25-2017 | Jul 2017 EXPECTED 06-25-2017 | Aug 2017 EXPECTED 07-25-2017 | Sep 2017 EXPECTED 08-25-2017 |
| Oct 2017 EXPECTED 09-25-2017 | Nov 2017 EXPECTED 10-25-2017 | Dec 2017 EXPECTED 11-25-2017 | Jan 2018 EXPECTED 12-25-2017 | Feb 2018 EXPECTED 01-25-2018 | Mar 2018 EXPECTED 02-25-2018 | Apr 2018 EXPECTED 03-25-2018 | May 2018 EXPECTED 04-25-2018 | Jun 2018 EXPECTED 05-25-2018 |
| Jul 2018 EXPECTED 06-25-2018 | Aug 2018 EXPECTED 07-25-2018 | Sep 2018 EXPECTED 08-25-2018 | Oct 2018 EXPECTED 09-25-2018 | Nov 2018 EXPECTED 10-25-2018 | | | | |

Unusual Frequencies

- Create boxes for one year of issues
 - Choose frequency closest to what you have
 - Delete/Edit boxes to fit
 - Update boxes as a group to correct volume/issue numbers
- Create additional sets of boxes patterned on original set, with *Extrapolate* boxes
 - Duplicates schedule
 - Check cover date

Extrapolate Boxes

Number of times: 1

Issues | Supplements

Cover Expected Dates

| Cover date | Issue | month | year |
|---------------|-------|------------|------|
| | 1st | Nov | 2020 |
| Expected date | 1st | 11-09-2020 | |

Starting Enumeration

| | |
|-----|----|
| v. | 66 |
| no. | 11 |

OK Cancel

Edit Cards, Boxes, and Holdings Statements

Cards and Boxes

- Edit or delete the card parameters using **Tools | Card menu | Edit Card**
- Edit or delete issue boxes using the dropdown menu **Tools | Box menu**. It is also possible to edit a specific box by double clicking on the selected box
- To edit a range of issues, highlight the group of boxes, then select **Tools | Box menu | Update boxes as a group**.

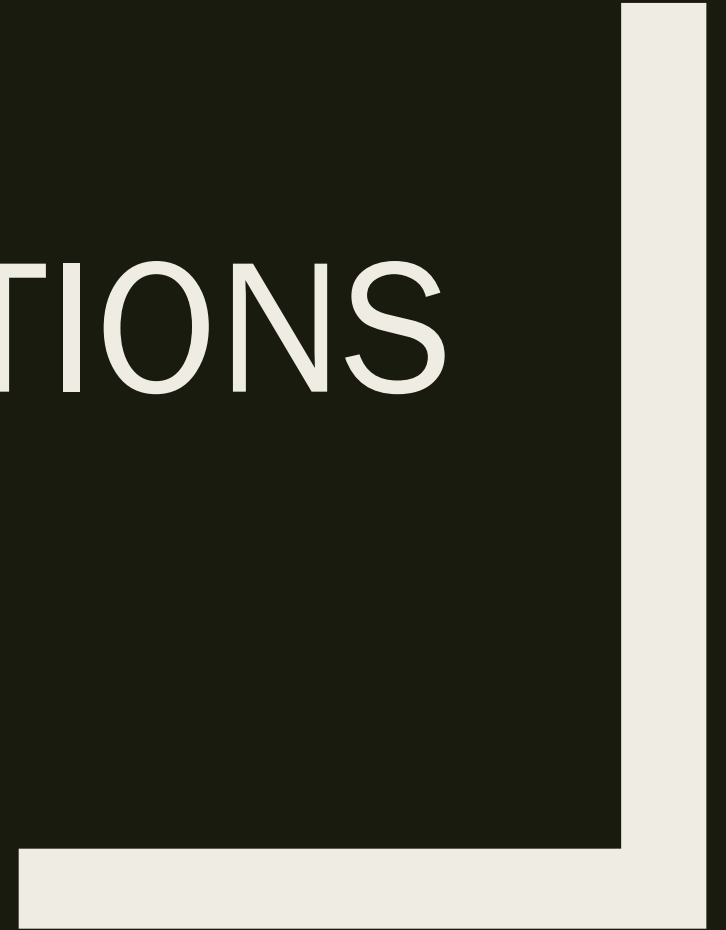
Holdings Statements

- Click on the *Record* tab
- To edit: place curser in LIB. Has field and change message
- To Insert: Click *Insert Field* button
 - Type '*h*' - *Library Has*
- Type in message
- Click **OK**
- **Save** changes

Tips on Boxes

- To delete a box, highlight and use delete key
- Double-click a box to open Modify screen
 - *An attached item will show; click to open*
- Right click to get full menu
 - *Box menu for editing, adding, deleting boxes*
- When item records are attached, delete item records at the same time
 - *Delete a year of issues with 3 clicks*
 - ***Don't delete a box without also deleting the item and don't delete an item without deleting the box***

CHECKIN FUNCTIONS

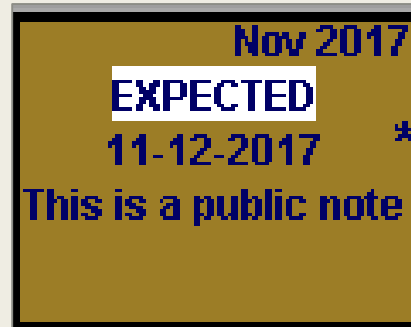


Check In Functions

- Search by title or .c#
- Select the desired box and check the Cover Date, Vol. & no. for accuracy
- Click the **Check in** button (or press the letter **C**). The system changes the checkin card box **Status** to "ARRIVED"
- If the serial has multiple copies, enter the number of copies received in the Copies to Check In dialog. Sierra changes the checkin card box **Status** to "ARRIVED" or "PARTIAL", if not all issues are checked in
- If you are creating items during checkin, create the item record now
- Choose the **Close** button to return to the search window and start a new search

Adding Notes

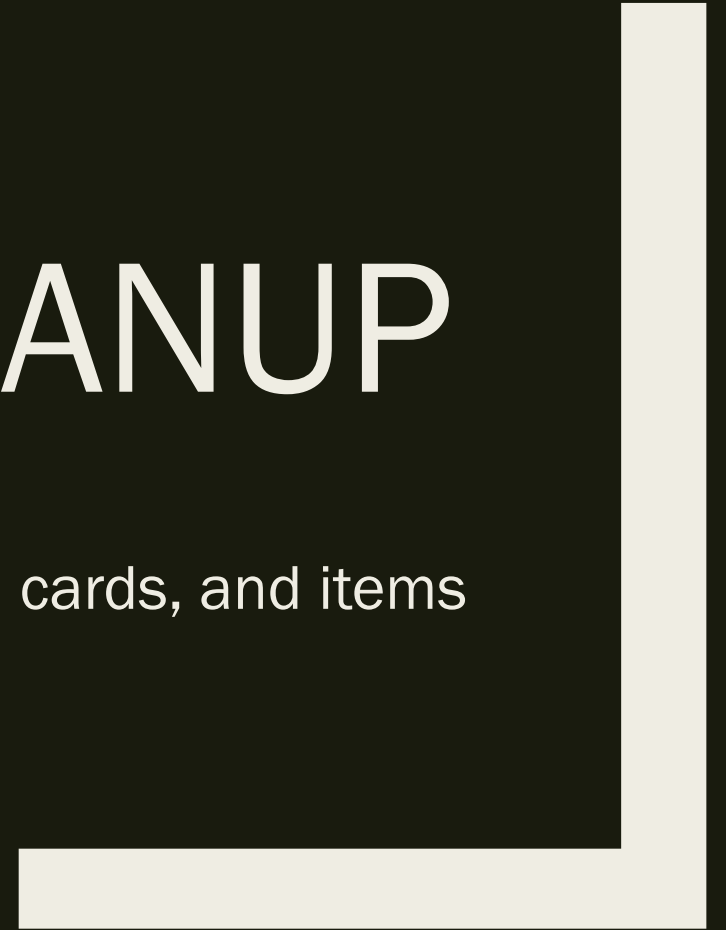
- In Modify boxes individually (Ctrl+m)
- Public or staff note
- Public shows in WebPAC on the card display
- In Sierra
 - *Public shows in box*
 - *Staff indicated by **
 - Hover over to see

A screenshot of the "Modify Boxes Individually" dialog box. The dialog has a title bar with a close button. It contains several sections:

- Status**: A dropdown menu set to "E EXPECTED".
- Cover Expected Dates**: A section with three input fields: "Month/Season" (set to "Nov"), "Day", and "Year" (set to "2017"). Below these is an "Expected date" field set to "11-12-2017".
- Enumeration**: A section with "Levels" and "v. no." labels and two empty input fields.
- Claims written**: An input field set to "0".
- Total copies received**: An input field set to "0".
- URL**: An empty input field.
- Public Note**: A text area containing "This is a public note".
- Staff Note**: A text area containing "This is a staff note".
- Suppress From Public Display**: A checkbox that is currently unchecked.
- At the bottom right, there are "OK" and "Cancel" buttons.

CLEANUP

Checkin records, Checkin cards, and items



Delete Records

- Delete Boxes
 - *Retrieve checkin card*
 - *Select boxes to delete*
 - *Choose **Tools | Box Menu | Delete Boxes**. Sierra displays the following message:*
 - **Are you sure you want to delete the selected boxes**
 - *Choose **Yes** to delete the box(es)*
- Delete a Checkin Card:
 - *Find the Bibliographic record*
 - *Select from the dropdown menu **Tools | Card Menu | Delete Card***
 - *This deletes the card only. The Holdings record will remain in the system*
- Delete both Holdings record and attached card:
 - *Find the Bibliographic record*
 - *Select Summary tab*
 - *Select the record to be deleted from the Summary tab by clicking the checkbox or the line of the record*
 - *Click the Delete button.*

Cleanup with Create Lists

All Checkin Records / sort by updated date

NT SCLS CHECKIN

Store Record Type: CHECKIN c

Range Start c25000007 Stop c25004591

Classic

| Term | Operator | Type | Field | Condition | Value A | Value B |
|------|----------|------|-------|-----------|---------|---------|
| 1 | | | | | | |

Sorting Fields

| Line | Type | Field |
|------|---------|---------|
| 1 | CHECKIN | UPDATED |

OK

Cleanup with Create Lists

Checkin updated date < less than [date]

The screenshot shows a 'Boolean Search' window with the following configuration:

- Review File Name: NT SCLS OLD CHECKIN REC
- Store Record Type: CHECKIN c
- Range: (dropdown)
- Start: c25000007
- Stop: c25004591

The search is configured in 'Classic' mode. The search criteria are defined in a table:

| Term | Operator | Type | Field | Condition | Value A | Value B |
|------|----------|------|---------|-----------|------------|---------|
| 1 | | c | UPDATED | less than | 11-03-2016 | - - |

The resulting search expression is: CHECKIN UPDATED less than "11-03-2016"

Control buttons on the right include: Group, Ungroup, Insert Line, Append Line, Delete, and Clear All.

Bottom navigation buttons include: Search, Use Existing Search, Retrieve Saved Query, Save, Save As, and Close.

Cleanup with Create Lists

Find journals received within a certain time from checkin box:

Store Record Type: Checkin and Card

Checkin | Box Status | = (equal to) | A

And

Checkin | Trans Date | w (between) | [date] | [date]

The screenshot shows the 'NT CHECKIN' application window. At the top, the 'Store Record Type' is set to 'CHECKIN AND CARD'. There is an unchecked checkbox labeled 'Retain each box separately in review file'. Below this, a 'Range' dropdown is set to 'Classic'. The 'Start' field contains 'c25000007' and the 'Stop' field contains 'c25004591'. On the left, a sidebar lists 'Classic', 'Enhanced', and 'JSON', with 'Classic' selected. The main area displays a search criteria table:

| Term | Operator | Type | Field | Condition | Value A | Value B |
|------|----------|---------|------------|-----------|------------|------------|
| 1 | | CHECKIN | Box Status | equal to | A | |
| 2 | AND | CHECKIN | Trans Date | between | 10-01-2017 | 10-31-2017 |

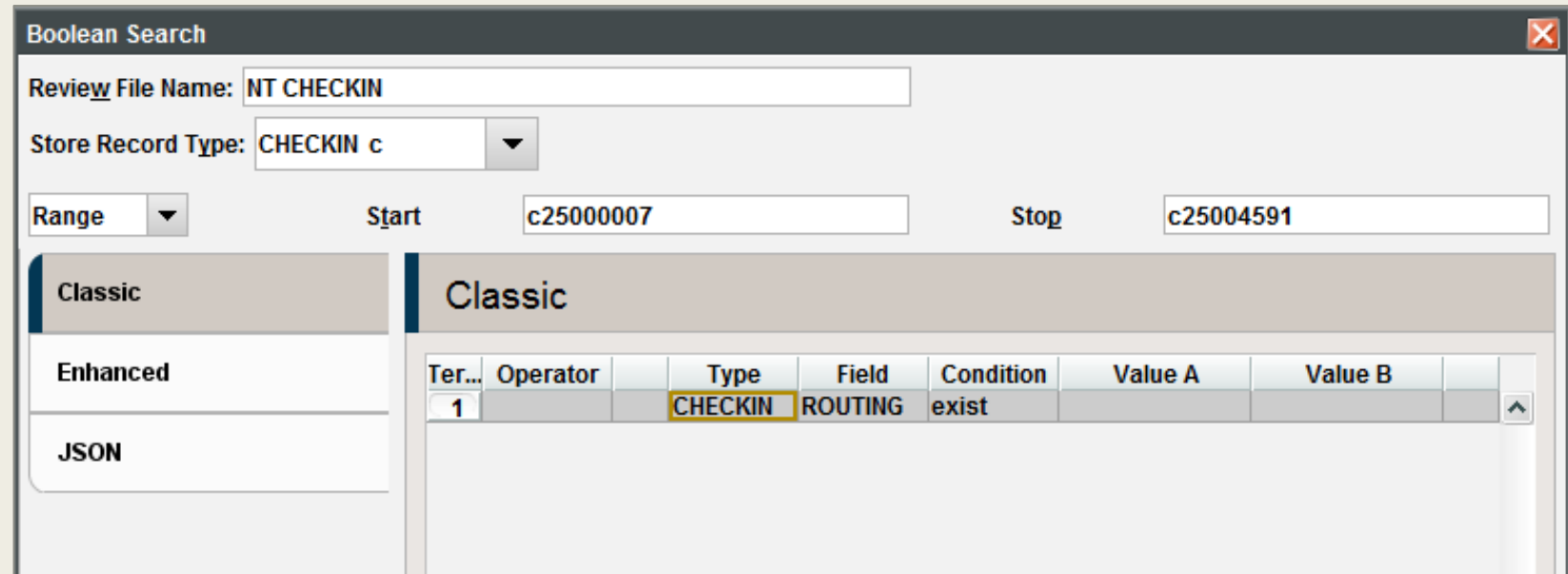
At the bottom of the window, the resulting search criteria are displayed as a single line: 'CHECKIN Box Status equal to "A" AND CHECKIN Trans Date between "10-01-2017"and "10-31-2017"'. The window title bar includes a close button (X).

Cleanup with Create Lists

Find Routing Records:

Store Record Type: Checkin

Checkin | Routing | exist



The screenshot shows a 'Boolean Search' dialog box with the following fields and values:

- Review File Name: NT CHECKIN
- Store Record Type: CHECKIN c
- Range: (dropdown arrow)
- Start: c25000007
- Stop: c25004591

On the left side, there is a sidebar with three options: Classic (selected), Enhanced, and JSON.

The main area displays a table with the following data:

| Ter... | Operator | Type | Field | Condition | Value A | Value B |
|--------|----------|---------|---------|-----------|---------|---------|
| 1 | | CHECKIN | ROUTING | exist | | |

Searching for Late issues

The expected date for a serial is the date it is expected to arrive at the library for check-in. A grace period, in the card's **Days before claim** field, follows the expected date. If the serial has not been checked in by the end of the grace period, the expected issue displays in the checkin card as "LATE". (However, the "late" display does not change the actual status, which remains "EXPECTED"). Use Function **Claiming** to find Late issues:

- Find missing issues
- Correct mistakes
- System stops at each card
- Determine if issue is really missing or an error occurred
 - *Claim or correct*
- Stop anytime
 - *Stats show on records scanned, records found, cards claimed*

Claiming to find Late issues

sierra **FUNCTION** Claiming

Save View Edit WB Summary Print

Range Current To [Previous](#) [Next](#) [Stop](#)

b23357782

TITLE The Long Island Catholic.

PUBLISHER Rockville Centre, N.Y. : Catholic Press Association of the Diocese of Rockville Centre

| | |
|------------------------|-----------|
| Summary | |
| Record | c2500007x |
| Card | c2500007x |
| Holdings | c2500007x |
| Routing | 0 |
| Bib-Level Holds | 0 |

Card

[Claim One](#) [Claim All](#)

Last payment

| | | | | |
|--------------------------------------|--------------------------------------|--------------------------------------|--------------------------------------|--------------------------------------|
| Aug 29 2012 MISSING 08-30-2012 | Sep 5 2012 ARRIVED 09-07-2012 | Sep 12 2012 ARRIVED 09-13-2012 | Sep 19 2012 ARRIVED 09-20-2012 | Sep 26 2012 ARRIVED 09-27-2012 |
| | 1 | 1 | | 1 |
| Oct 3 2012 ARRIVED 10-04-2012 | Oct 10 2012 ARRIVED 10-11-2012 | Dec 20 2012 ARRIVED 11-27-2012 | Jan 2013 CLAIMED 1 11-05-2012 | Jan 2013 LATE 01-17-2013 |
| 1 | 1 | 1 | | |

120 boxes

Sending Claims

- Must be done to clear processing file
- Send to printer or email to yourself
 - *Sending via email vendors required separate product*
- Can sort, limit by vendor or delete line items
- Can choose to print only certain lines
 - *Check lines to print*
 - *Claim print*
 - *Choose Print selected*
 - *Once printed, those claims are cleared*
 - *Still need to deal with the rest*
 - Done when screen is clear

Sending Claims

sierra **FUNCTION** Send Claims

Delete Edit Print Close

Claim Print 3 claims to PRINT Limit by Vendors Limit by Location Sort All

Vendors selected: ALL
Location selected: ALL

| # | Record | Title | Cover Date | Issue | Location | Vendor |
|---|-----------|---------------------------|--------------|--------|----------|--------|
| 1 | c25001024 | Closing the gap : CTG. | Feb-Mar 2010 | v.28:6 | sclsh | ebsch |
| 2 | c25000226 | Publishers weekly. | Jun 7, 2010 | | sclsr | ebscp |
| 3 | c2500007x | The Long Island Catholic. | Jan 2013 | | sclsr | none |

Serials Best Practices

- Delete old checkin boxes and cards before claiming
- Delete old checkin boxes as new are added. Keep only current subscription
- If you cancel a subscription or it ceases publication, indicate that in Holdings Record
- Delete old items on a regular basis. Set up a retention policy and set up a workflow to follow it
 - *ex: keep 1 year for monthly magazines, keep 6 months for weekly, etc.*
- Read the PALS Best Practices for Cataloging on the Gateway. Includes Serial Records
 - <http://gateway.suffolklibrarysystem.org/node/1504>