

Starting Serials in Sierra

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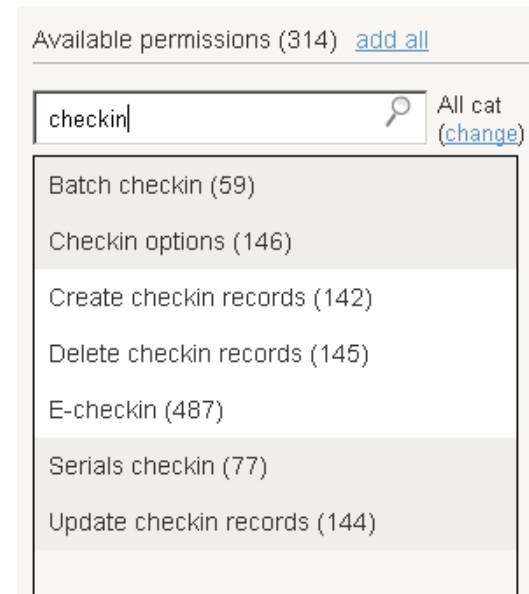
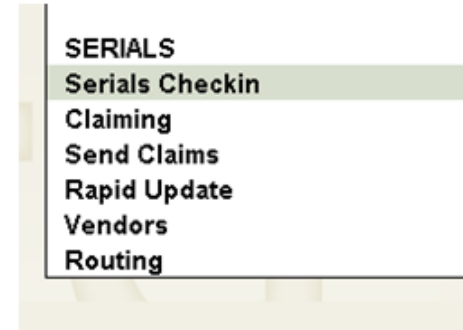
Indianhead Federated Library System

Eau Claire, Wisconsin



Workflow and Authorizations

- Workflow
 - ◆ Assign functions
- Authorizations
 - ◆ Serials checkin (77)
 - ◆ Claim overdue issues (88)
 - ◆ Bind serials (89)
 - ◆ Create checkin records (142)
 - ◆ Update checkin records (144)
 - ◆ Delete checkin records (145)
 - ◆ Checkin options (146)



Setup

Admin – Settings

New Record templates
Macros

No Modifier	ALT	CTRL	SHIFT
F1	Current issue does not circulate.		
F2	Current year + 2 years.		

Record templates
Checkin
Item

New Record Templates	
Bibliographic:	baudc Bib Audiobook on CD
Order:	Prompt for template
Checkin:	ifmag IFLS Serials
Authority:	Prompt for template
Item:	ifamg IFLS Magazines
Patron:	Always prompt for template
Course:	Prompt for template
Vendor:	_v Vendor default

Records to attach to new bibliographic records: Item Order Checkin



Setup

Admin – Options

Edit

- Display box note

Setup

- Take item location from checkin record

- Prompt to generate claims

- Add supplements and indexes

- Show claim all button

- Recent checkin history (number)

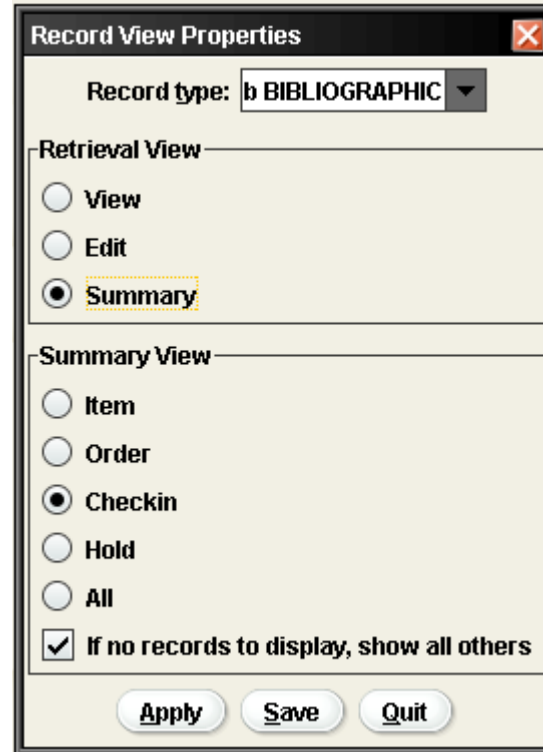
Tabs

- Serial tabs to display



Setup

- View
 - ◆ Record View Properties
 - Retrieval View
 - Summary View
- Vendor Records
 - ◆ Create if vendors are used



The screenshot shows a dialog box titled "Record View Properties" with a close button in the top right corner. At the top, there is a "Record type:" label followed by a dropdown menu showing "b BIBLIOGRAPHIC". Below this, the dialog is divided into two sections: "Retrieval View" and "Summary View". In the "Retrieval View" section, there are three radio buttons: "View", "Edit", and "Summary", with "Summary" selected and highlighted by a yellow dashed border. In the "Summary View" section, there are five radio buttons: "Item", "Order", "Checkin", "Hold", and "All", with "Checkin" selected. At the bottom of the dialog, there is a checked checkbox labeled "If no records to display, show all others". At the very bottom, there are three buttons: "Apply", "Save", and "Quit".



Creating Checkin Cards

- Select matching bib record
- Click Attach New Checkin



The screenshot shows a library catalog record for a book. The record ID is b15519648. The title is 'National geographic kids.' The imprint is '[Washington, National Geographic Society, 2002-]' and the ISBN/ISSN is 1542-3042. Below the record details, there is a 'Summary' tab and a 'Record' section showing 'c10007015'. A 'View' dropdown menu is set to 'c Checkin'. At the bottom right, there are buttons for 'Attach New Checkin', 'Delete', 'Move', and 'Select'.

Enter:

- Items on Card
- Choose Frequency
- Cover date
- Enumeration values
- Claiming/Binding information
 - If not binding, leave blank



Checkin Cards

- Completed Checkin Card
 - Check box for Create Item
 - Confirm accuracy
 - Click OK
- Card will open
 - One box for each issue

Create Card

Status: C Current | Items on card: 60
Display mode: C Box Display | Order record: No Order Selected
 Create item during check-in | Suppress OPAC display

Issues | Supplements | Indexes

Cover Expected Dates

Frequency: m Monthly

	Issue	month	day	year
Cover date	1st	Nov		2013
Expected date	1st	11-01-2013		

Enumeration

Volume: 5
Issue: 1
Issues per volume: 12
Numbering continuity: r Restart

Claiming Binding

Days before claim: 30
Unit of binding:
Binding delay:

Advanced
OK Cancel



New Checkin Card

b20326324
TITLE Scrapbooking & beyond.
IMPRINT Newton, NJ : All American Crafts. f20041-

Summary
New CHECKIN
New Card New CHECKIN
New HoL... New CHECKIN
Bib-Level Holds 0

New Card

Check-in date Tue Nov 05 2013 Create item

Nov 2013 EXPECTED 11-01-2013 v.5 no.1	Dec 2013 EXPECTED 12-01-2013 v.5 no.2	Jan 2014 EXPECTED 01-01-2014 v.5 no.3	Feb 2014 EXPECTED 02-01-2014 v.5 no.4	Mar 2014 EXPECTED 03-01-2014 v.5 no.5	Apr 2014 EXPECTED 04-01-2014 v.5 no.6	May 2014 EXPECTED 05-01-2014 v.5 no.7
Jun 2014 EXPECTED 06-01-2014 v.5 no.8	Jul 2014 EXPECTED 07-01-2014 v.5 no.9	Aug 2014 EXPECTED 08-01-2014 v.5 no.10	Sep 2014 EXPECTED 09-01-2014 v.5 no.11	Oct 2014 EXPECTED 10-01-2014 v.5 no.12	Nov 2014 EXPECTED 11-01-2014 v.6 no.1	Dec 2014 EXPECTED 12-01-2014 v.6 no.2
Jan 2015 EXPECTED 01-01-2015 v.6 no.3	Feb 2015 EXPECTED 02-01-2015 v.6 no.4	Mar 2015 EXPECTED 03-01-2015 v.6 no.5	Apr 2015 EXPECTED 04-01-2015 v.6 no.6	May 2015 EXPECTED 05-01-2015 v.6 no.7	Jun 2015 EXPECTED 06-01-2015 v.6 no.8	Jul 2015 EXPECTED 07-01-2015 v.6 no.9

- Note check mark in front of Create Item
- All issues are Expected
 - If entering prior issues, some will be late
- Each box has cover date, expected date, volume and issue number
- Click Save
 - “New” on tabs replaced by .c record number



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

Month/ Season	Day	Year
Dec		2013

Create Item for Box	Ctrl-R
Modify Boxes Individually	Ctrl-M
Extrapolate Boxes	Ctrl-O
Delete Boxes	Delete
Update Boxes as a Group	Ctrl-U
Refresh Expected Dates	Ctrl+Shift-R
Insert Issue Boxes before Selected	Insert
Add Issue Boxes at End of Card	Alt-Insert
Insert Supplement Boxes before Selected	Shift-Insert
Add Supplement Boxes at End of Card	Alt+Shift-Insert
Insert Index Boxes before Selected	Ctrl-Insert
Add Index Boxes at End of Card	Ctrl+Alt-Insert
Print Labels	Ctrl-P
Print Routing Slip	Alt-O



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

Extrapolate boxes

Duplicates schedule

Check cover date

Extrapolate Boxes

Number of times: 4

Issues

Cover	Expected Dates	Issue	month	year
Cover date	1st	Jan		2015
Expected date	1st	01-01-2015		

Starting Enumeration

v.	13
no.	1

OK Cancel



Checking In Issues

Search for bib record

Current card will open

Highlight issue box

Click Check In

If item creation is enabled, item template will open

Save

Item status arrived

Shows arrival date

Card		
Nov 2013 ARRIVED 11-05-2013 v.5 no.1	Dec 2013 EXPECTED 12-01-2013 v.5 no.2	Jan 2014 EXPECTED 01-01-2014 v.5 no.3



Adding Notes

In Modify boxes individually
Public or staff note
Public shows in OPAC on the card
display
In Sierra

Public shows in box
Staff indicated by *
Hover over to see



Modify Boxes Individually

Status: A ARRIVED

i4541757

Cover Expected Dates

Cover date	Month/Season			Day	Year
	Dec				2013

Expected date: 11-11-2013

Enumeration

Levels	v.	no.
		12

Claims written: 0

Total copies received: 1

URL:

Public Note: Christmas specials included.

Staff Note: Save for Christmas collection.

Suppress From Public Display

OK Cancel



Editing Cards

Make corrections

Mark filled

- When all boxes are arrived

- Keeps card from opening automatically

Suppress from OPAC display

- To avoid multiple cards displaying

- When items are no longer available

Delete

- When all boxes/items are withdrawn/deleted



Archiving Cards

Done when closing one card and needing another

- Marks current card filled

- Creates new card

- Duplicates publication information

To Archive:

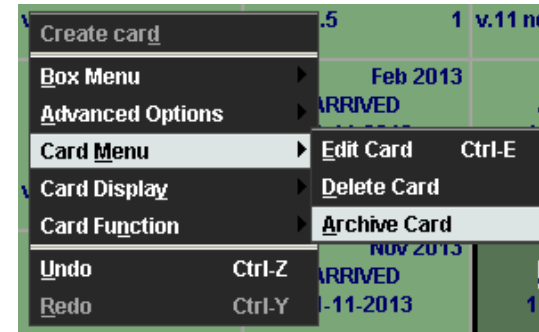
- Right click, Card menu

- Archive card

- Check new checkin card for any changes

- Choose to Extrapolate boxes

 - Verify dates and enumeration



Editing Boxes

Add Issue Boxes at end of Card

To add the next year

Insert supplement Boxes before selected

Delete Boxes (can use delete key)

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 item and don't delete an item without deleting the box

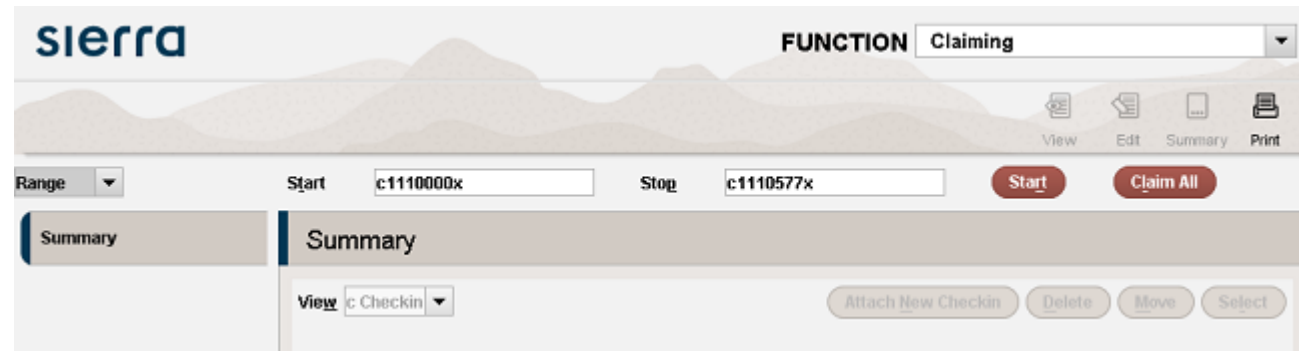


Claiming

Use Function Claiming

Find Missing Issues

Correct Mistakes



- System stops at each card with Late issue
- Determine if issue is really missing or an error occurred
 - Claim or correct
- Can Stop anytime
 - Stats show on records scanned, records found, cards claimed



Send Claims

Must be done to clear processing file

Send to printer or email to yourself

Sending via email to vendors requires 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



Thank you!

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