



Sierra Serials for Beginners

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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)

The image shows two screenshots from a web application. The top screenshot is a menu for 'SERIALS' with the following items: 'Serials Checkin' (highlighted), 'Claiming', 'Send Claims', 'Rapid Update', 'Vendors', and 'Routing'. The bottom screenshot shows a search interface for permissions. It displays 'Available permissions (314)' with a link to 'add all'. A search box contains the text 'checkin|' and a magnifying glass icon. To the right of the search box, it says 'All cat' and a link to '(change)'. Below the search box, a list of search results is shown: 'Batch checkin (59)', 'Checkin options (146)', 'Create checkin records (142)', 'Delete checkin records (145)', 'E-checkin (487)', 'Serials checkin (77)', and 'Update checkin records (144)'.

Setup

- Admin – Settings
 - New Record templates
 - Macros

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

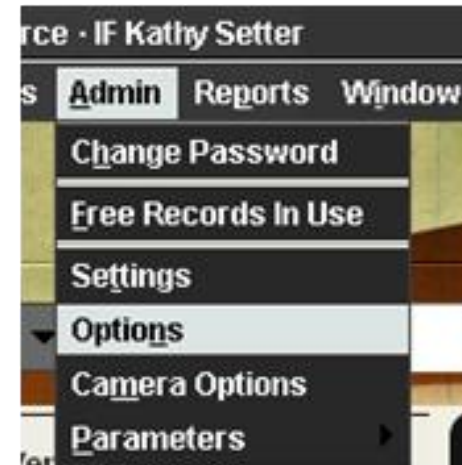
- Record templates
 - Checkin
 - Item

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

Records to attach to new bibliographic records: Item Order Checkin

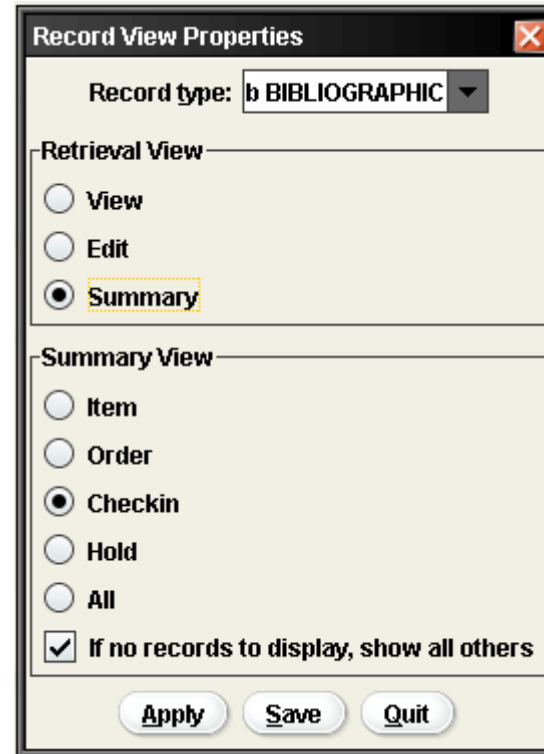
Setup

- 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 label "Record type:" followed by a dropdown menu showing "b BIBLIOGRAPHIC". Below this, there are 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 box. 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.' and the imprint is '[Washington, National Geographic Society, 2002-]'. The ISBN/ISSN is 1542-3042. Below the record details, there is a 'Summary' tab and a 'Record' section with the ID c10007015. A 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: 36

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	Jan	2022
Expected date	1st	01-01-2022	

Enumeration

Volume: 26

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

Summary	New Card						
New	CHECKIN						
New Card	New CHECKIN						
New Ho...	New CHECKIN						
Bib-Level Holds	0						
Check-in date <input type="text" value="Mon Mar 07 2022"/> <input checked="" type="checkbox"/> Create item <input type="button" value="Check In"/>							
Jan 2022	Feb 2022	Mar 2022	Apr 2022	May 2022	Jun 2022	Jul 2022	
LATE 01-01-2022	LATE 02-01-2022	EXPECTED 03-01-2022	EXPECTED 04-01-2022	EXPECTED 05-01-2022	EXPECTED 06-01-2022	EXPECTED 07-01-2022	
v.26 no.1	v.26 no.2	v.26 no.3	v.26 no.4	v.26 no.5	v.26 no.6	v.26 no.7	
Aug 2022	Sep 2022	Oct 2022	Nov 2022	Dec 2022	Jan 2023	Feb 2023	
EXPECTED 08-01-2022	EXPECTED 09-01-2022	EXPECTED 10-01-2022	EXPECTED 11-01-2022	EXPECTED 12-01-2022	EXPECTED 01-01-2023	EXPECTED 02-01-2023	
v.26 no.8	v.26 no.9	v.26 no.10	v.26 no.11	v.26 no.12	v.27 no.1	v.27 no.2	
Mar 2023	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023	
EXPECTED 03-01-2023	EXPECTED 04-01-2023	EXPECTED 05-01-2023	EXPECTED 06-01-2023	EXPECTED 07-01-2023	EXPECTED 08-01-2023	EXPECTED 09-01-2023	
v.27 no.3	v.27 no.4	v.27 no.5	v.27 no.6	v.27 no.7	v.27 no.8	v.27 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
Mar		2022
Expected date: 03-07-2022		

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

The screenshot shows the 'New Card' interface with a calendar of issue boxes. A context menu is open over the 'Update Boxes as a Group' option. The calendar shows boxes for various months and years, with some labeled 'LATE' or 'EXPECTED'. The context menu includes options like 'Create Item for Box', 'Modify Boxes Individually', 'Extrapolate Boxes', 'Delete Boxes', 'Update Boxes as a Group', 'Refresh Expected Dates', 'Insert Issue Boxes before Selected', 'Add Issue Boxes at End of Card', 'Insert Supplement Boxes before Selected', 'Add Supplement Boxes at End of Card', 'Insert Index Boxes before Selected', 'Add Index Boxes at End of Card', 'Print Labels', and 'Print Routing Slip'. The 'Update Boxes as a Group' option is highlighted, and its keyboard shortcut 'Ctrl-U' is visible.

The 'Update Boxes as a Group' dialog box is shown. It has several sections:

- Status:** A dropdown menu set to 'E EXPECTED'.
- Cover Expected Dates:** A section with checkboxes for 'Cover date', 'Expected date', and 'Increment transaction dates'. The 'Expected date' field is set to '01-01-2022'. There are also fields for 'Month/Season' (set to 'Jan/Feb') and 'Day/Year' (set to '2022').
- Enumeration:** A section with a checked checkbox for 'Levels'. The 'v.' field is set to '12' and the 'no.' field is set to '1'.
- Other fields:** 'Claims written' (0), 'Total copies received' (0), 'URL', 'Public Note', and 'Staff Note'.
- Public Display:** A section with checkboxes for 'Show Public Display' and 'Suppress From Public Display'.

At the bottom, there are 'OK' and 'Cancel' buttons.

Unusual Frequencies

- Extrapolate boxes
 - Duplicates schedule
 - Check cover date

Summary	New Card						
New	CHECKIN						
New Card	New CHECKIN						
New Hol...	New CHECKIN						
Bib-Level Holds	0						
	Check-in date <input type="text" value="Mon Mar 07 2022"/> <input checked="" type="checkbox"/> Create item <input type="button" value="Check In"/>						
	Jan/Feb 2022 LATE 01-01-2022	Mar 2022 EXPECTED 03-01-2022	Apr/May 2022 EXPECTED 04-01-2022	Jun 2022 EXPECTED 06-01-2022	Jul 2022 EXPECTED 07-01-2022	Aug/Sep 2022 EXPECTED 08-01-2022	Oct 2022 EXPECTED 10-01-2022
	v.12 no.1	v.12 no.2	v.12 no.3	v.12 no.4	v.12 no.5	v.12 no.6	v.12 no.7
	Nov/Dec 2022 EXPECTED 11-01-2022	Jan/Feb 2023 EXPECTED 01-01-2023	Mar 2023 EXPECTED 03-01-2023	Apr/May 2023 EXPECTED 04-01-2023	Jun 2023 EXPECTED 06-01-2023	Jul 2023 EXPECTED 07-01-2023	Aug/Sep 2023 EXPECTED 08-01-2023
	v.12 no.8	v.13 no.1	v.13 no.2	v.13 no.3	v.13 no.4	v.13 no.5	v.13 no.6
	Oct 2023 EXPECTED 10-01-2023	Nov/Dec 2023 EXPECTED 11-01-2023	Jan/Feb 2024 EXPECTED 01-01-2024	Mar 2024 EXPECTED 03-01-2024	Apr/May 2024 EXPECTED 04-01-2024	Jun 2024 EXPECTED 06-01-2024	Jul 2024 EXPECTED 07-01-2024
	v.13 no.7	v.13 no.8	v.14 no.1	v.14 no.2	v.14 no.3	v.14 no.4	v.14 no.5
	Aug/Sep 2024 EXPECTED 08-01-2024	Oct 2024 EXPECTED 10-01-2024	Nov/Dec 2024 EXPECTED 11-01-2024				
	v.14 no.6	v.14 no.7	v.14 no.8				

Extrapolate Boxes ✕

Number of times

Issues

Cover Expected Dates

	Issue	month	year
Cover date	1st	Jan/Feb	2023
Expected date	1st	01-01-2023	

Starting Enumeration

v.	<input style="width: 100px;" type="text" value="13"/>
no.	<input style="width: 100px;" type="text" value="1"/>

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 record and Card)
- Item status arrived
 - Shows arrival date

Card						
Check-in date <input type="text" value="Mon Mar 07 2022"/> <input checked="" type="checkbox"/> Create item <input type="button" value="Check In"/>						
Mar 2022	Apr 2022	May 2022	Jun 2022	Jul 2022	Aug 2022	EXPEC
ARRIVED 03-07-2022 * Spring Special	EXPECTED 04-01-2022	EXPECTED 05-01-2022	EXPECTED 06-01-2022	EXPECTED 07-01-2022	EXPECTED 08-01-2022	EXPEC 09-01-2022
v.26 no.3	1 v.26 no.4	v.26 no.5	v.26 no.6	v.26 no.7	v.26 no.8	v.26 no.9

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

Card	c11200832	Mar 2022 ARRIVED 03-07-2022 *	Apr 2 EXPECTED 04-01-2022
Holdings	c11200832	Spring Special v.26 no.3	1 v.26 no.4
Bib-Level Holds	0	Jan EXPECTED 01-01-2023	Save for spring display EXPECTED 02-01-2023

Modify Boxes Individually

Status: A ARRIVED

i5728085

Cover Expected Dates

Cover date	Month/Season	Day	Year
	Mar		2022

Expected date: 03-07-2022

Enumeration

Levels	v.	26
	no.	3

Claims written: 0

Total copies received: 1

URL:

Public Note: Spring Special

Staff Note: Save for spring display

Suppress From Public Display:

OK Cancel

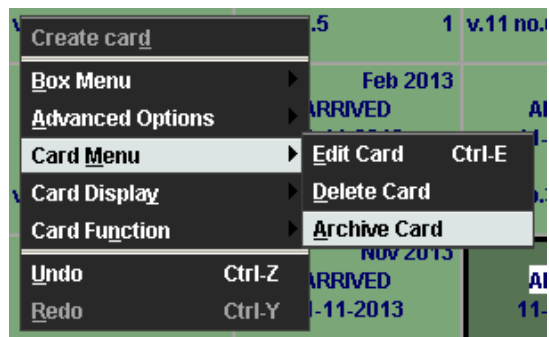
Editing Cards

- 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



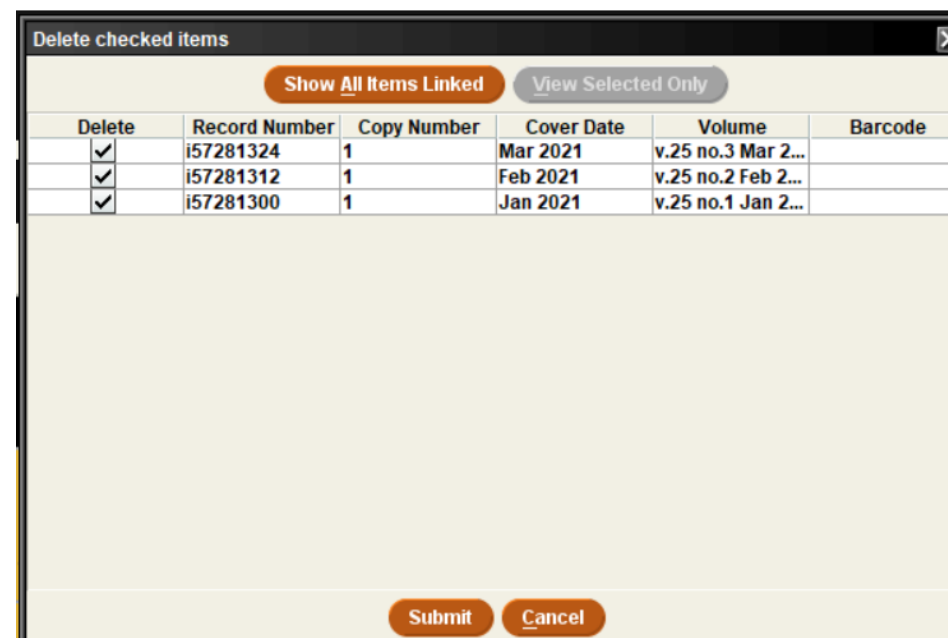
Archiving Cards

- 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

A screenshot of a web-based form titled 'Edit New Checkin to Store Card - New CHECKIN'. The form has a 'Save' button at the top right. Below the title, it shows 'New CHECKIN', 'Last Updated: 03-07-2022', 'Created: 03-07-2022', and 'Revisions: 0'. The form contains several input fields: 'LABEL TYPE' (n NO LABEL), 'CLAIMON' (01-31-2022), 'SCOPE3' (- ---), 'SCOPE1' (- ---), 'LOCATION' (ifmag IFLS Magazines), 'SCOPE4' (- ---), 'SCOPE2' (- ---), 'RLOC' (12 12), 'UPDCNT' (- DO NOT COUNT), 'COPIES' (1), 'VENDOR' (none none), and 'PCOUNT' (0). Below these fields is a 'MARC Leader' section with a text input field containing '##### n y 2 2 ##### 3 n 4 5 0 0'. There are also fields for 'CALL #' (MAG) and 'LIB. HAS' (1 year). At the bottom, there is a small dialog box with two buttons: 'Extrapolate Boxes' and 'Create Card from Scratch'.

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



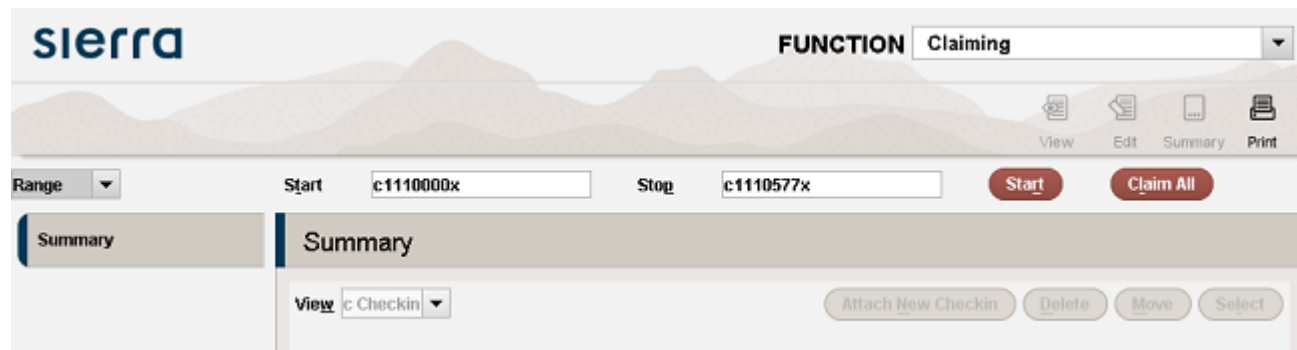
The screenshot shows a dialog box titled "Delete checked items" with a close button (X) in the top right corner. Below the title bar, there are two buttons: "Show All Items Linked" (highlighted in orange) and "View Selected Only" (highlighted in grey). The main content is a table with the following columns: "Delete", "Record Number", "Copy Number", "Cover Date", "Volume", and "Barcode". The table contains three rows, each with a checked checkbox in the "Delete" column.

Delete	Record Number	Copy Number	Cover Date	Volume	Barcode
<input checked="" type="checkbox"/>	i57281324	1	Mar 2021	v.25 no.3 Mar 2...	
<input checked="" type="checkbox"/>	i57281312	1	Feb 2021	v.25 no.2 Feb 2...	
<input checked="" type="checkbox"/>	i57281300	1	Jan 2021	v.25 no.1 Jan 2...	

At the bottom of the dialog box, there are two buttons: "Submit" and "Cancel", both highlighted in orange.

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
- More detailed instructions on Claiming:
<https://www.ifls.lib.wi.us/knowledge-base/serials-claiming/>



THANK YOU

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