

Sierra Serials

MINERVA & URSUS

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Authorizations

In order to use the Serials Function, users need the following permissions:

- 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)

Initial Setup

There are a few housekeeping tasks which will help ease working with serials:

- Record Templates will be the most helpful in creating consistent records in the system. This particularly helps when there are multiple individuals doing a task, leaving less room for inconsistency or omission.
- Macros can perform several steps at once or they can enter repetitive words, phrases or alpha-numeric characters.
- Changing the Record view to **Checkin** in the **Record View Properties** will help jump directly to the checkin record when searching.
- Making a particular template appear after creating a new bibliographic record or setting the system to **Always Prompt for Template** are helpful options.

Create Checkin Template

If your library doesn't have a checkin record template currently for your periodicals, magazines, journals, etc., follow the directions below:

1. Next, select the **Record Templates** tab.
2. Change the **Record Type** to **Checkin**.
3. Create a **Checkin Template** by clicking the **New** button.

The screenshot shows a software interface for creating a record template. At the top is a menu bar with 'File', 'Edit', 'View', 'Tools', and 'Help'. Below the menu is a toolbar with icons for 'Insert', 'Save', 'Print', 'Prompt', and 'Close'. The main form area is titled 'LOCATION' and contains several input fields and buttons. On the right side of the form, there are 'Move Up' and 'Move Down' buttons. The form fields are organized as follows:

LABEL TYPE	n NO LABEL	CLAIMON	- -	SCODE3	
SCODE1		LOCATION	oplpn Orono PL New Periodicals	SCODE4	
SCODE2		RLOC	p PERIODICALS	UPDCNT	- DO NOT COUNT
COPIES	1	VENDOR		PCOUNT	

At the bottom of the form, there is a text area with a yellow arrow icon and the text 'h Library has [insert timeframe here]'.

4. Fill in the necessary fields, some of which are dependent on your preferences. Double-click on each field to see the available options. To insert variable-field information, select the **Insert** icon.
5. Click the **Save** icon.
6. Click the **Close** icon.
7. Click the **Save Settings** button.

Create Item Record Templates

If your library doesn't have item record templates currently for your periodicals (a.k.a. magazines, journals, serials, etc.) follow the directions below. Create different templates for different types if there are great differences between them. Otherwise, you can setup one template and have the "different" fields prompt and manually change them as needed.

1. Change the **Record Type** to **Item**.
2. Create an **Item Template** by clicking the **New** button.
3. Fill in the necessary fields, some of which are dependent on your preferences.

COPY #	1	LCHKIN	- -	LOCATION	oplpn Orono PL New Periodicals
ICODE1		INVDA	- -	LOANRULE	
ICODE2	n SUPPRESS	IN LOC		STATUS	o LIBR USE ONLY
I TYPE	17 Serial	#RENEWALS		INTL USE	
PRICE	\$5.00	#OVERDUE		COPY USE	
OUT DATE	- -	ODUE DATE	- -	IMESSAGE	
OUT LOC		IUSE3		OPACMSG	-
DUE DATE	- -	RECAL DATE	- -	YTDCIRC	
PATRON#		TOT CHKOUT		LYCIRC	
LPATRON		TOT RENEW			

b
 c 092 MAG

Setup template prompts

1. Go to **Admin**
2. Select **Settings**
3. Go to the **New Record** tab
4. Under **New Record Templates**, make sure your **Checkin** drop-down menu is set to **Always prompt** for template.

Note: **Prompt for template** will allow you to choose one template at the beginning of each session and will use that one until the session is ended. While selecting a specific template uses that template for all sessions when creating Checkin records.

Create Macros

Macros will help you streamline your workflow, especially for repetitive tasks. The Macros tab allows customization of the keyboard function keys. The system offers the ability to customize function keys F1 through F12, plus those same function keys in combination with the Alt, Ctrl, or Shift, e.g., Alt+F1, Ctrl+F1, Shift+F1, etc.

If you have customized your function keys by using macros, you can press the function key or function key combination to activate the macro. For example, if you set F10 to “|e author,” then you could key F10 after an author’s name in the 100 field instead of keying the subfield every time.

Customizing Function Keys

Each login can create its own function key settings. To customize the function keys for a login:

1. Select **Settings** from the **Admin** menu.
2. Click the **Macros** tab in the dialog that displays
3. Select one of the following tabs depending on which keys you want to customize:
 - **No Modifier** – to customize function keys F1 through F12
 - **ALT** – to customize function key combinations Alt+F1 through Alt+F12
 - **CTRL** – to customize function key combinations Ctrl+F1 through Ctrl+F12
 - **SHIFT** – to customize function key combinations Shift+F1 through Shift+F12
- Click in the text box for the function key you want to modify. Note that the system designates a particular function key as “**RESERVED**” if it is unavailable for customization.

	No Modifier	ALT	CTRL	SHIFT
F1	%ALT+g%d%l%			
F2	%ALT+g%u%d%			
F3	%ALT+g%u%c%			
F4	%ALT+g%c%g%			
F5	%ALT+g%c%u%			
F6	%ALT+g%d%1%			
F7	%ALT+g%d%r%			
F8	%ALT+g%d%s%			
F9	%ALT+g%u%h%			
F10				
F11				
F12				

Entering Text in a Macro

To enter text for a macro, key the text. Note that the Macros tab is case-sensitive (i.e., it distinguishes between capital and lowercase letters). If you want a capital ‘G’, for example, make sure you enter ‘G’ and not ‘g’.

For example, key “Journal of ” (without quotation marks) in the Alt+F11 text box to associate the Alt+F11 function key with that string of text. Then, in a search screen, keying Alt+F11 will automatically enter “Journal of ” (without quotation marks) in the search text box.

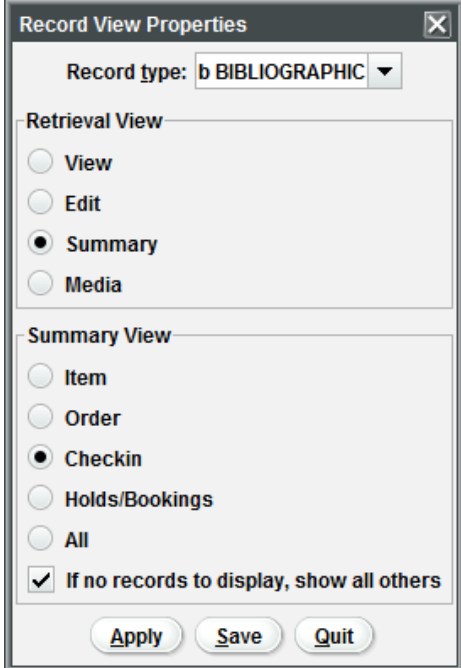
	No Modifier	ALT	CTRL	SHIFT
F1	©			
F2				
F3				
F4	RESERVED			
F5				
F6	RESERVED			
F7				
F8	Current issue does not circulate.			
F9	Current month plus 1 year.			
F10	Current week plus 3 back issues.			
F11				
F12	%CTRL+Shift+e%ALT+f%ALT+d%y			

[Reset](#)

Record View Properties

It is possible to change your record view that appears when clicking on a record in a results list. This makes navigating to the record types much quicker when a user works within certain record types consistently. Changing the record view can be done from the **Serials Checkin**, **Catalog**, and **Search/Holds** Functions.

1. Open the **Serials Checkin Function**.
2. Select **View** from the file menu.
3. Select **Record View Properties**.
4. In the **Record View Properties** screen, select the **Record Type** you want to view (usually, **Bibliographic** in Serials).
5. Choose the **Retrieval View** you want to appear as a default. Note: View and Edit will show the Bibliographic Record, while Summary shows any linked records. Media is not used in our consortium.
6. In the **Summary View**, select **Checkin**.
7. Click **Apply**.
8. Click **Save** and select **OK**. (This saves the changes permanently, while selecting **Apply** will change it for the session only.)
9. Click **Quit**.



The image shows a dialog box titled "Record View Properties" with a close button (X) in the top right corner. It contains two main sections: "Retrieval View" and "Summary View".

Record type: b BIBLIOGRAPHIC (dropdown menu)

Retrieval View:

- ☐ View
- ☐ Edit
- ☒ Summary
- ☐ Media

Summary View:

- ☐ Item
- ☐ Order
- ☒ Checkin
- ☐ Holds/Bookings
- ☐ All

☒ If no records to display, show all others

Buttons at the bottom: [Apply](#), [Save](#), [Quit](#)

OPAC Display

In the OPAC, the statement from the Checkin Record appears to patrons similar to below. Holding statements appear under the primary record information and if there are records (copies) attached they follow after the holdings statements.

The screenshot shows the MINERVA OPAC interface. At the top, there are links for 'New Search', 'Help', 'My Library Account', and 'SMS Terms'. A search bar contains 'entertainment weekly'. Below the search bar, there are options to 'Request', 'Add to Folder', 'MARC Display', 'Return to Browse', and 'Limit/Sort Search'. The search results show 'Title: Entertainment weekly', 'Mat. Type: Periodical', and 'Publisher: New York, NY : Entertainment Weekly, Inc., c1990-'. There are two holdings statements: one for 'Auburn PL Grand Reading Room' and another for 'Baxter ML Periodicals'. Both holdings show 'Lib. Has: 6 months' and 'Latest Received: December 16-23, 2016 no.1444/1445'.

Copies	LOCATION	CALL NO.	STATUS
	Curtis ML Adult Periodicals	v.26 no.44 Dec 26 Jan 2 2015	AVAILABLE
	Curtis ML Adult Periodicals	v.26 no.45 Jan 9 2015	AVAILABLE
	Curtis ML Adult Periodicals	Jan. 2013 - v.26 no.46 Jan 16 2015	AVAILABLE
	Curtis ML Adult Periodicals	Jan. 2013 - v.26 no.47 Jan 23 2015	AVAILABLE
	Curtis ML Adult Periodicals	Jan 30/Feb 6 2015	AVAILABLE
	Curtis ML Adult Periodicals	Feb 13 2015	IN PROCESSING
	Curtis ML Adult Periodicals	Jan. 2013 - Feb 20 2015	AVAILABLE
	Curtis ML Adult Periodicals	Feb 27 2015	IN PROCESSING

Checkin Record

Generally, a library will have only one Checkin Record per serial title. However, there are some exceptions, such as when a library owns the paper and microform, or the e-journal and the paper). The Checkin Record contains the MARC holdings information that identifies what years, issues, volumes, etc. the library has in their collection. For more information on MARC holdings information, refer to <http://www.loc.gov/marc/holdings/echdhome.html>

Checkin Card

This is a literal replacement for the paper cards where you check off issues as they arrive.

- Can be set up to predict what's coming
- Can prompt you for overdue issues.
- Can automatically create items upon checkin

Create New Checkin Record

The first step in creating a new checkin record is to ascertain if a bibliographic record for the title exists. If so, then move on to **Attach Checkin (Holdings) Record**. If not, then a matching record needs to be brought into the system from z39.50 or OCLC. If such a record does not exist, then create an original bibliographic record following the guidelines of your consortium for original cataloging and ensure that the serial/periodical fields are filled in, then move on to section [Attach Checkin \(Holding\) Record](#).

Attach Checkin (Holdings) Record

To create a Checkin record that is attached to an existing bibliographic record follow the steps below:

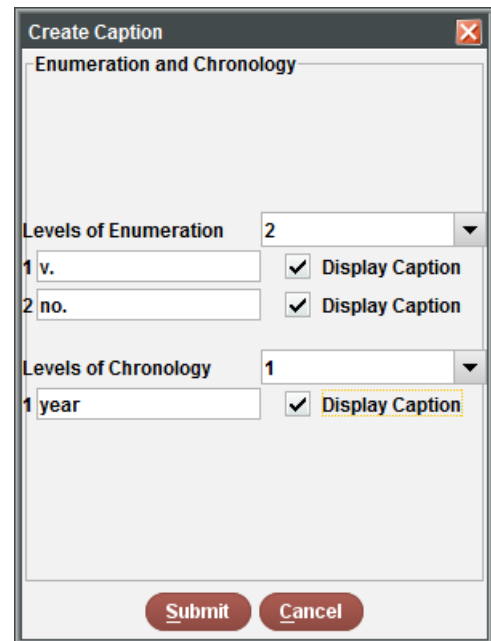
1. From the **Summary** tab change the **View** dropdown to **Checkin**, then select **Attach New Checkin**.
 2. Select a record template, if prompted. This will depend on whether the login settings have been updated for **Settings>New Records** tab in the **Options** for **New Checkin Records** section and in the **Record Templates** tab.
 3. Follow the prompts from the template and within each dialog box. In the **Edit Data** dialog box, ensure that the **Location** is correct for the serial/periodical you are working with. If not, double-click on the **Location** field for options.
 4. If you wish to change one of the fixed-field default values, double-click in the fixed field to bring up a list of valid options for that field.
 5. Select **Next** to skip a field and/or to proceed to the next prompt of the template.
- ❖ If you **HAVE NOT** selected **Create checkin card when creating holdings record** in the **Admin>Settings>New Records** tab in the **Options** for **New Checkin Records** section, you may now add/edit additional variable and fixed fields. To add a variable-length field, select the **Insert** icon to see the additional options. Next, move on to the [Checkin Record Holdings tab](#) section.
 - ❖ If you **HAVE** selected **Create checkin card when creating holdings record** in the **Admin>Settings>New Records** tab in the **Options** for **New Checkin Records** section, then a **Create Checkin Card** dialog box will appear. To proceed, follow the directions in the [Setup a checkin card](#) section and then on to the [Checkin Record Holdings tab](#) section.

Checkin Record Holdings tab:

To add additional holdings ranges or to update an existing one...

1. Select the **Add New Range** button
2. Enter **Enumeration and Chronology** information for the serial/periodical in the **Create Caption** dialog box.
3. Click **Submit**.
4. Enter the first issue information in the **From** section.
5. Enter final issue information in the **To** section OR check **Open-ended**.
6. If there was a gap requiring a second range to be written, go back to **step 1**.
7. **Save** the record.

For additional information, refer to the **Sierra Manual** by clicking **Help** in the file menu and then selecting **Manual**.



The 'Create Caption' dialog box is titled 'Create Caption' with a close button (X) in the top right corner. It contains two main sections: 'Enumeration and Chronology' and 'Levels of Enumeration'. Under 'Enumeration and Chronology', there are two rows: '1 v.' and '2 no.', each with a 'Display Caption' checkbox checked. Below this is 'Levels of Enumeration' with a dropdown set to '2'. Under 'Levels of Chronology', there is one row: '1 year', with a 'Display Caption' checkbox checked. At the bottom are 'Submit' and 'Cancel' buttons.

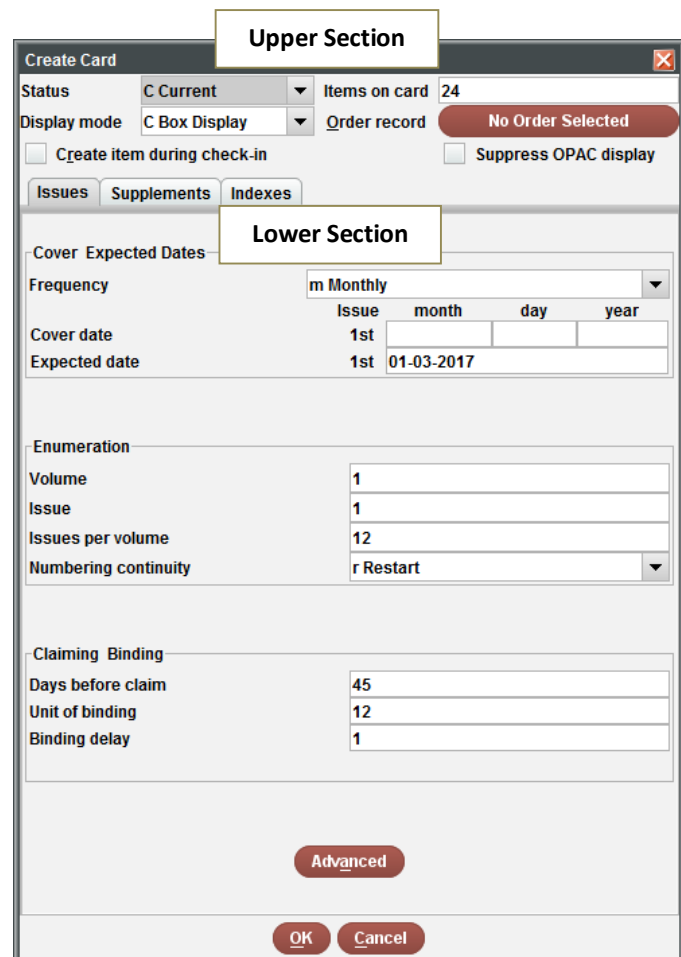
Set up checkin card

From Serials Check-in mode, users can create a checkin card in either **Simple** or **Advanced** modes. Simple mode allows users to check in cards with two levels of enumeration (volume and issue for example). Advanced mode allows users to create up to six levels of enumerations plus two alternate levels that conform to the full MARC 21 standard.

If you are not automatically prompted to create a card, you can select the Card tab and then Create Card. The Create Card dialog box will open.

Upper section elements:

1. Use the default "Status" **Current**, and the "Display mode" **Box display**.
2. Decide if you want to create an item record for each issue as it is checked in. If not, leave the "Create item during checkin" unchecked. If you want to



The 'Create Card' dialog box is titled 'Create Card' with a close button (X) in the top right corner. It has two main sections: 'Upper Section' and 'Lower Section'. The 'Upper Section' contains fields for 'Status' (C Current), 'Display mode' (C Box Display), 'Items on card' (24), 'Order record' (No Order Selected), and checkboxes for 'Create item during check-in' and 'Suppress OPAC display'. Below these are tabs for 'Issues', 'Supplements', and 'Indexes'. The 'Lower Section' contains fields for 'Cover Expected Dates', 'Frequency' (m Monthly), 'Issue' (1st), 'Cover date' (1st), 'Expected date' (01-03-2017), 'Enumeration' (Volume 1, Issue 1, Issues per volume 12, Numbering continuity r Restart), and 'Claiming Binding' (Days before claim 45, Unit of binding 12, Binding delay 1). At the bottom are 'Advanced', 'OK', and 'Cancel' buttons.

always create an item for each received issue on a card, check this box.

3. Additional defaults:

- a. Default **Items on card** (number of boxes) is 24. Change this to any number up to 120 (For example, annuals would be 12 and weekly periodicals would be 52.)
- b. Default **Order record** is the first order record attached to the bib record if there is one. Select another order record by clicking on the box.
- c. Default **Suppress OPAC display** is unchecked. Suppressing the card eliminates the **Latest received** link in the Web OPAC display so that the public cannot view the card.

Lower section elements: (Issues, Supplements, and Indexes tabs)

1. Default **Frequency** is monthly. Use the drop-down menus to change the frequency.
2. Enter the cover date of the first issue to be received. [If the item does not use cover dates, select **Advanced** to edit the chronology pattern.]
3. The system will supply an expected date based on the cover date you entered. Change this date to reflect the date you expect to receive the issue. This date will be used to create expected dates for the rest of the boxes on the card.
4. Enter the enumeration or numbering of the first issue to be received. **WARNING:** If the item does not use numbering, or uses any number of levels of enumeration other than two (such as, volume:number or year:issue), select **Advanced** to edit the enumeration level. This simply gives you more options for levels.
5. **Issues per volume** tells the system where to start renumbering the next volume.
6. Numbering continuity indicates whether numbering continues or restarts with each new volume.
 - a. **restart** = numbering starts over with each new volume (ie v.1 no.12 then v.2 no.1) i.e. Vogue
 - b. **continue** = numbering continues with each new volume (ie v.1 no.12 then v.2 no.13) i.e. Irish historical studies
7. **Days before claim** and **Unit of binding** in the **Claiming Binding** section will automatically change when you select your frequency. Verify that they match your policies and change them accordingly or leave the system-supplied default of 45 days.
8. **Unit of binding** is how many issues are in the bound volume. (Use zero if not binding.)
9. **Binding delay** is the number of issues that should remain on the shelf after the unit of binding is sent to the bindery. (Use zero if not binding.)
10. **Advanced** offers additional options for enumeration.

For additional information, refer to the **Sierra Manual** by clicking **Help** in the file menu and then selecting **Manual**.

Incoming – check in

1. In the **Serials Checkin** function, search for the title record.
2. Change the **Summary View** to **Checkin** if it isn't already.
3. Select the **Current** checkin record for your library.
4. The next expected issue box will automatically be highlighted. This issue should be the next issue for your copy in hand. If not, then find the matching checkin box on the card. Verify that the enumeration information is correct and fix if necessary. To edit, right-click and select **Box Menu**, or go to **Tools>Box Menu**. Choose the appropriate option from the list.
5. To create an item after checking in the issue, select the **Create item** checkbox and move on to step 6. To checkin the item without creating an item, move on to **step 6**.
6. If the selected box is correct, click the **Check In** button or simply hit the "c" key.

Note: supplements (special issues) or index issues are added as a separate type of box. These boxes have a little "s" or "i" in the corner.

Create items (for an already checked in box)

To create an item for an already checked in box (if you forgot to check the box, for example), right-click and select **Box Menu>Create item for box**. This will lead you through the usual item-creation process, but with some useful info already filled in from the checkin box. This item is thereafter associated with the box.

For additional information, refer to the **Sierra Manual** by clicking **Help** in the file menu and then selecting **Manual**.

Editing and Removing

Editing a Card

There are many ways to alter the card—by adding boxes for issues to the end, inserting boxes in the middle or beginning, deleting boxes, or modifying the content or status of boxes. All options are available by right-clicking a box look at the **Box Menu** or by looking under **Tools>Box Menu**.

Fixing a basic pattern

Once the card has been created you can manipulate the boxes until your basic "pattern" is correct. Then you can "extrapolate" the pattern for future years. The first step in this process is to delete the boxes we do not want and rename the combined issue boxes. For example, to make a 10 issue monthly (with combined summer issues) you would need to take the following steps:

1. First have a card with 12 boxes: one for each month. Delete the July box and the September box (**Tools>Box Menu>Delete Boxes** or press the **Delete** key on your keyboard)
2. Change the cover title for the June box to say Jun/Jul (Double-click on the box)
3. Change the cover title for the August box to say Aug/Sep (Double-click on the box)
4. Next, change the issue numbers in the last four boxes so that they are numbered sequentially 7-10 with the following steps:
5. Highlight all four boxes that have incorrect issue numbers
6. Click **Tools>Box Menu>Update Boxes as a Group** OR right-click and select **Update Boxes as a Group**
7. Change the issue number. A check will appear in the box on the left side signifying that this change will be applied (incrementally) to all the boxes highlighted.
8. Click **OK**

Extrapolating the Boxes

Now that the cover dates and issue numbers are all correct we are almost ready to extrapolate. Change our card parameters to 10 issues per volume instead of 12 so that the extrapolation process will know to start the renumbering after issue number 10. Then extrapolate as many years as we like. For example, add 3 more years of boxes to this card with the following steps:

1. Click **Tools>Card Menu>Edit Card** OR right-click and pick **Edit Card**
2. Change the **Issues** per volume from 12 to 10 and choose **OK**.
3. Highlight all the boxes (Click and drag from the first box to the last, or Click on the first box and **<Shift><Click>** on the last box, or press **<Alt><A>**).
4. Choose **Tools>Box Menu>Extrapolate Boxes** OR right-click and select **Extrapolate Boxes**
5. Change the "number of times" to extrapolate from 1 to This means extrapolate the entire pattern of boxes 3 more times for 30 more boxes. Then choose **OK**.
6. You can see that each of the 3 years that we added already has the June/July and August/September boxes combined and the issues numbered 1 through 10.
7. The card is now ready to save and use for check-in.

For additional information, refer to the **Sierra Manual** by clicking **Help** in the file menu and then selecting **Manual**.

Remove discards

To remove extra boxes or discarded serials from the checkin card, follow these steps:

1. Right-click on the box and select **Box Menu>Delete Boxes** OR simply select the box(es) and hit the delete key. If you created items along with these boxes, you will be offered to delete the connected items. If you're discarding, then you do.
2. Serials automatically selects all of the Item records for the card you are deleting. If you choose not to delete some or all of the Item records, deselect the check boxes in the Delete column.

3. Update holdings automatically (if you have your preferences set to that) or by going back into the Holdings tab and modifying the holdings there (same as you created them, but instead of adding, you're changing the start values)

Full cards – archive or delete?

When you have a full card (120 boxes), you can either archive the card or delete boxes from the beginning to make less than 120 boxes again. If necessary, archive the checkin cards, however it is recommended to delete them when no longer needed as they clutter the summary screen in the SDA , as well as, the OPAC.

To Archive Card

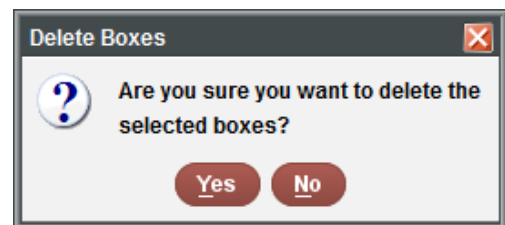
Right-click and select **Card Menu>Archive Card**. This will create a new card with the same parameters as the archived card.

Delete Card

1. Right-click and select **Card Menu>Delete Card**
2. Delete related items if appropriate, or uncheck boxes to leave them until they are discarded.
3. Remove item records as you usually do when cataloging.

Delete Box

1. Hold the **CTRL** key down and click all the boxes to be deleted.
2. Right-click on them and select **Box Menu>Delete Boxes**.
3. Select Yes, in the Delete Boxes pop-up.



Changes in the Title or Publisher

Some changes require changes to the bib record or a new record. Remember that significant Title or Publisher changes may require a new bibliographic record to be created, rather than just changing the details in the existing record. Policies differ for the different groups in the state, so consult with the Cataloging Standards Committee if you have any doubts.

Other Functions

Paying

- Done through attached order records if you have them. Orders for periodicals are like any other order with a recurring or multiple payments.
- If you do not use or need to be reminded about renewals, use a tickler.

Claiming

You can search your library's database for all issues that are displaying as LATE. Late serials can be claimed. Although the systems are not set up to do automatic claiming (consortial usage makes it complicated to automatically claim), it can be useful to look through claims in order to find items that have not arrived in a timely manner so you can follow up with the publisher/distributor. To do so:

1. Change the current function to **Claiming**.
2. Use the drop-down list to choose a method of searching for issues to claim. Your choices include:
 - a. **Range** - to search a range of records (i.e. ALL)
 - b. **Review** - to search a review file – If you create a review file of just your own periodicals, you can avoid seeing other library records.
 - c. **Index** - to search an indexed field range
 - d. **Advanced** - to use Advanced Keyword Search options
3. Choose **Start**.
4. Sierra searches for a record with **LATE** issues. The checkin card will usually display with the late issues selected. If it doesn't, you may have to pick the **Card** tab.
5. Hitting the **Claim One** button doesn't actually do any sending of letters or emails, but it does indicate that you have seen this late issue and are doing something about it, so it is useful for your own reference.
6. While searching:
 - a. Choose **Next** to go to the next record.
 - b. Choose **Previous** to go back to the previous record.
 - c. Choose **Stop** to stop searching for late issues and to exit the current record.

Warnings

Minerva and URSUS: Please be careful not to edit other libraries' records. It's especially easy if you're reviewing claims.

URSUS: Different accounting units cannot touch the others' serials. They will show as greyed out and say **Other: _**. However, within an accounting unit, different libraries can inadvertently delete another library's records.

NOTES
