

Serials

Quick Start Guide



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Introduction

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

- journals, periodicals, and newspapers
- government documents
- monographic series

Sierra supports:

- standard and special serials, including advance sheets, supplements, cumulations, reprints, microform reproductions, indexes, etc.
- spine labels and pocket parts
- all frequencies (regular and irregular)

A serials Holdings record is attached to a Bibliographic record. It is possible to attach more than one Holdings record to a Bibliographic record, (for example. for paper, online, and microform versions of the same serial title, for different locations, or for different Serials Units.)

A serials Checkin card is associated with a serials Holdings record (one card per Holdings record). The card specifies the frequency and chronology of a serial. It also specifies the enumeration (or numbering) of the periodical issues. It is also used to facilitate the claiming and binding function for associated periodical issues.

If you encounter difficulty following the links, try the links on Chrome, or go directly to <http://csdirect.iii.com/sierrahelp> , log in and search for the topic.

Log In

Serials are maintained in the) with some parameters maintained in the Admin Corner of the Administration Application.

b11781683

TITLE Family Circle easy knitting.

Publication Info. New York, N.Y. : \$b Family Circle ; Butterick Co. Inc., [1994?]-

Call No. 746.434 Fam

LOCATIONS

Summary

Record c11001136

Card c11001136

Holdings c11001136

Routing 0

Bib-Level Holds 0

Summary

View

#	Record Number	Location	Identity	STATUS ▲	FREQUENCY	BOXES
✓ 1	c11001136	epper		NO CARD		

c11001136
1 Attached Holdings Records

There are 6 potential tabs associated with each Bibliographic record when the holdings tab is accessed in a record display.

1. **Summary** tab: In this tab it is possible to view a summary list of all Holdings records attached to a specific Bibliographic record.
2. **Record** tab: This tab displays the Holdings record (including the fixed-length and variable-length fields associated with the selected Holdings record).
3. **Card** tab: This tab displays the Checkin card for the record. The display of the card contains a box (or line) for each individual issue of that serial.
4. **Holdings** tab: This tab displays holdings information (the volumes or issues the Library owns in the library collection for the Holdings record which was selected from the summary tab display).
5. **Routing** tab: The use of this tab is optional, and may display the list of individuals to whom this serial is routinely routed after receipt.
6. **Bib-level holds** tab: This tab provides the optional functionality of placing holds for a particular title.

Record Fields

All Sierra record types (i.e.: Bibliographic, Item, Holdings, Order, Patron, etc.) are made up of fixed-length (103162) and variable-length (103171) fields.

Each Fixed-length field contains a specific code, numeric or alphabetic or alphanumeric, which is selected from the set of valid codes for that field. Each fixed-length field for a particular record type appears in every record of that type. Fixed-length fields are not repeatable. Valid codes are established in the Parameters section of the Admin pull down menu. Modification, addition, or deletion of these code values are performed only by a user with appropriate permissions to modify codes in the system.

All variable-length fields are repeatable. Some fields have a specific use and are automatically generated by the system (such as ROUTING fields.) Other fields, (for example: NOTE), are available for you to enter free text. Some variable-length fields can be indexed, and may be used to retrieve records. The library may ask Innovative to index certain fields (not all) if they are not already indexed (for example, Publisher).

New Record Templates

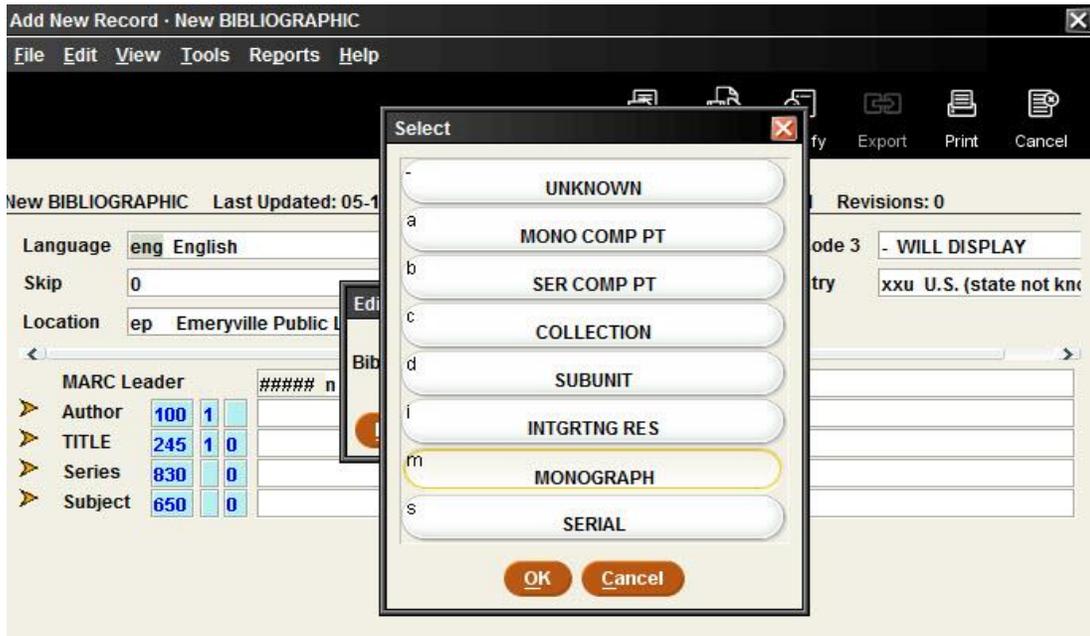
The Sierra system uses new record templates to create new records. A new record template can be configured by the library to prompt the user to fill in specific fields. A new record template can also be configured to contain default data in certain fields which is automatically inserted into the record during the new record creation process. The library may configure an unlimited number of new record templates in the Sierra System. Additional information is contained in the Sierra WebHelp. ([need link](#))

Creating and Editing Records in Sierra

Serials Check-in Function

This function is used to create, edit, and delete Bibliographic and Holdings records. It is also possible to attach other record types to a Bibliographic record in this function, depending on the permissions associated with the initials and password of the user.

- Record display is in MARC tag order.
- It is possible to create new Bibliographic, Holdings, and Item records in this function
- It is possible to create new Bibliographic, Holdings, and Item records one field at a time by using a new record template. It is also possible to download records from a bibliographic utility or subsequent to a Z39.50 search. The downloading process may be on a one-by-one record basis, or by using a batch file of records, depending on library preference. Additional details regarding downloading files of records can be found in the “Load Batch Files of Records Using Data Exchange Function” portion of this document.
- Optionally, it is possible to use prompts in the new record creation templates (known as the “wizard”) to create records individually.
- Fixed-length fields which are prompted in the “wizard” are always presented first
 - Press the space bar or double click in the white area of the prompt box to view all valid values



- Select from the list of valid values using the mouse and click on the appropriate line of the choice. Alternatively, use the up or down arrows on the keyboard or type a valid code in the white data box. Any of these methods may be used.
- Press <Enter> or click the **Next** button to move to the next prompted field.
- If there is no change to a presented field, or to accept the value already inserted in the fixed field, press <Enter> or click the **Next** button.

Create new Bibliographic Records

- Select **Serials Check-in** function. Then select the **New** icon from the toolbar at the top of the screen. Alternatively, use <Ctrl>-N, or select **File | New record | Bibliographic record** from the dropdown menu.
- Select an appropriate new record template, or use the default template, if it has been previously specified.
- Insert the fixed-length and variable-length fields as prompted by the template.
- Select the Save icon from the toolbar to save the new record.
- Additional information regarding new record creation, remote searching via Z39.50, and downloading records in batch files is available in the Cataloging Quick Start Guide.

Attach a Holdings Record to a Bibliographic Record

- After searching for and selecting the Bibliographic record, select the Summary tab by clicking on it. Click on the “View” dropdown menu within the **Summary** tab. Select the “c Holdings” line from the dropdown menu.



- Click on the **Attach New Holdings** button and the system will ask the user to select an appropriate template or the user is prompted immediately to use a pre-selected template and the Holdings record creation can begin immediately. This is dependent on the new record template settings in the **Admin | Settings | Record Templates**
- If “Use wizard to create new records” has been selected, the “wizard” will guide the user through the creation of the new Holdings record
- If the “Use wizard to create new records” option has not been selected, the user will need to create the Holdings record manually, selecting appropriate fields to insert individually
- Insert values into the fixed-length and variable-length fields as prompted by the selected template.
- When all prompted fields are completed, a **Create Card** dialog box normally displays.

Creating Checkin cards

- A Checkin card is associated with the Holdings record. It is possible to associate only **one** Checkin card with each Holdings record. 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
- After the process of card creation and configuration is completed, each card will contain an individual check in box (or line) for each issue specified. The box or line format is specified individually in each card configuration.
- There are two functions of card creation:
 1. **Simple** function consists of only two levels of enumeration, with labels for each portion of the enumeration expressed as, “**v.**” and “**no**” (for volume and issue number).
 2. **Advanced** function is used with serials that conform to the full MARC 21 standard, which includes up to 6 levels of enumeration plus two alternate enumeration levels. In addition, it is possible to specify a different *Caption* (or label), *Function*, number of *Pieces per level*, and *Numbering continuity* for each enumeration level.
- Use the <Tab> key to move through the fields in the dialog box. Do not press <Enter> until all necessary fields have been completed on the Checkin card. The use of <Enter> will invoke the <Submit> button by default, and the card configuration data will be immediately submitted for creation of the card.
- In the upper right portion of the card is located the section in which the user will specify the number of boxes or lines to be created on the Checkin card. A maximum of 120 boxes or lines may be configured per Checkin card.
- In the upper left portion of the card is located the section in which the user will specify the *Status* of the card from a dropdown menu. Cards may be assigned the status of: Current (C), Filled (F), Unused (U), or Archived (I).
- The checkbox area labeled “*Create item*” specifies if Item record creation is required at the time each serial issue is checked in (or arrives). If a checkmark is inserted in the checkbox, the system will automatically proceed to create an Item record when each issue is checked in (or arrives)
- The dropdown box area within the Checkin card dialog box labeled “*Update holdings?*” may be used to set the response of Yes, No, or Ask. This optional feature may be used to update summary holdings within the library as each issue is checked in. If the answer is set to “Yes”, the system will automatically append the date of the most-recently received issue to the end of the holdings statements. It is important to understand that if certain issues between received issues have not been received, that the system will configure the holdings appropriately. Review the section below which discusses the Holdings tab for additional information.

- The checkbox area labeled “*Suppress OPAC display*”: specifies that the entire card should not display in the WebPAC. If a card is set to not display, it remains visible in Sierra Serials, but the card is **not** visible in the WebPAC.
- The dropdown menu “*Frequency*” includes common periodical frequencies, including the values “*Custom*” and “*Irregular*”. Examples are presented below:
 - Annual, bimonthly, daily, monthly, quarterly, etc.
 - Irregular and “Regular-irregular” patterns are included
 - 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. However, there are other options for working with these irregularly-received materials.
- It is extremely important to type in the appropriate *Cover date* and *Expected date* of the next expected issue. The Sierra system will use these dates, in combination, to predict (or extrapolate) and create the number of issue boxes or lines for the future as specified in the “*Items on card*” section specified above.
- Verify the appropriate *enumeration* levels and change any values which may be necessary.
- Type in values for the starting *volume*, *issue*, and number of *issues per volume*. It is not necessary to type in the labels (v., no., part, issue, etc.), because this is configured by using the **Simple** or **Advanced** functions discussed above. This is extremely important information which the system will use to create boxes or lines with correct enumeration (or piece labeling and numbering)
- In the section for *Numbering continuity*, there are two options. *Restart* numbering with each new volume, or *Continue* numbering through volumes. *Restart* is the appropriate option if the volume number increments after the receipt of a certain number of issues. *Continue* is appropriate if the enumeration continues sequentially, without changing any volume numbers.
- In the section *Days before claim*, the system normally inserts a default value of 1.5 times the frequency of a serial published more than 6 times a year, and half the frequency of a periodical published 6 times or less. This value is a very important selection. A correct value selection will assure that the system is able to recognize issues which have not been received within a reasonable time period. The system uses the Days before claim value to determine whether an issue is considered “late in arriving”. The *Days before claim* value is used by the system to label issues as “late”. “Late” issues are subsequently eligible for selection by the Sierra claiming function and to propose that it may be appropriate to send a claim for an issue which has not arrived. Incorrect or blank values in this field will result in issues not being presented in the Sierra claiming functions as eligible for claiming in a timely manner.
- In the section *Binding unit*, it is possible to specify the number of issues, which would normally be bound together. The value in this field assures that the system can identify groups of materials which have been received and which are eligible for sending to the bindery. Incorrect or blank values in this field will result in issues not being presented in the Binding function as eligible for binding in a timely manner.
- In the section *Binding delay*, it is possible to specify the number of issues which should be received in addition to the appropriate binding group before the system presents issues in a previous group for binding. This permits the option of assuring that there is a minimum of one issue remaining on the shelf before prior issues are removed from the shelf to send to the bindery. It is also possible to use this feature to assist with removing items from the shelves which should be discarded because they are superseded or outdated.
- When all appropriate values have been configured in the checkin card, press <Enter> or click on the **Submit** button. The Sierra system then considers all of the values inserted in the card

creation process, and creates a Checkin card. This results in a prediction (or extrapolation) of boxes or lines, based upon the cover date, enumeration, and frequency as specified in the checkin card configuration.

- If the box format is specified during card configuration, the following information will display in the box:
 - The Cover date for the issue will be in the top right corner of the box
 - The Status of the issue will be displayed under the cover date.
 - The transaction date (or expected date, received date, etc.) will be displayed under the cover date
 - Any note inserted in the box will display below the transaction date.
 - The number of copies received will display in the lower right corner of the box
 - The enumeration (volume, issue, part, etc.) will display in the lower left corner of the box.
- Click the **Save** button to save the Holdings record and the checkin card.
- The system assigns a unique identification number to the Holdings record which commences with the letter “c” and is followed by a series of digits.
- Click on the *Record* tab to view and to edit the Holdings record if needed.
- Choose the *Summary* tab to see all Holdings records attached to the selected Bibliographic record.

Supplements and Indexes

NOTE: Because Sierra Serials conforms to the MARC 21 standard, cards can distinguish between issues, supplements, and indexes for a serial. During card creation, it is recommended that the user create only the issues parameters. It is possible to configure parameters for Supplements and Indexes later as needed.

It is possible to set the parameters for Supplements and Indexes in advance of receiving Supplements or Indexes, or Supplements and Indexes may be inserted later as they arrive or are needed. In order to configure parameters for Supplements and Indexes, select from the dropdown menu **Tools | Card menu | Edit Card**. Alternatively, supplement, or index parameters may be configured at the time the first supplement or index arrives using **Tools | Card menu | Edit Card** and then **Tools | Box menu | Insert**. In the Box Menu, select the choice which is appropriate. Pay close attention to the wording of the option. Each option offers the possibility to insert **before** the selected box, or to insert **at end of card**. To select an individual box from the Checkin card, click **once** in the selected issue box. Clicking twice in an issue box will open up a dialog box for modification of certain values in the individual box. After any selection is made from the dropdown box, the system will propose the parameters necessary for configuration of the supplement or index box. After configuring the parameters it is possible to insert a specific box in the checkin card, with appropriate year, month, or time period. Creating indexes or supplements for the first time is a two-step process: configure the parameters, and then insert the box. Once parameters are configured, it will be possible to insert appropriate boxes as necessary for the future.

Editing Cards and Boxes

Cards

- Edit the card parameters using **Tools | Card menu | Edit card**

- Cards with any status display by default in the WebPAC.

It is possible to suppress certain card statuses from the WebPAC with the **SUPPRESS_CARD** web option. For more information about Web Options, consult the Condensed Web Options Training Manual available to all customers at

http://csdirect.iii.com/documentation/user_manuals/english_weboptions.doc

- and the *Sierra WebHelp*.
- **The message: *Latest received* displays in the WebPac for cards with the status “Current” only. Cards with other statuses which the library chooses to suppress must be specified in the above Web Option. This information does not presently display in Encore.**

Boxes

- Edit issue boxes using the dropdown menu **Tools | Box menu**. It is also possible to edit a specific box by clicking on the selected box twice to open the dialog box.
- Text of box status labels can be edited using the dropdown menu **Admin | Parameters | Serials | Box Status Labels**. This option offers the possibility to reword status labels such as “Arrived”, “Late”, etc. This is applicable only in the Sierra function. Box Status labels in the WebPAC are modified using other record display Web Options.
- To edit a range of issues, highlight the group of boxes, then select **Tools | Box menu | Update boxes as a group**. To select a consecutive range, click once on a particular box. Using the <Shift> key, click on the last box in the range. It is also possible to click on the first box in the range and, concurrently, holding down the <Shift> key, glide the mouse to the last box desired in the range. To select random boxes, click once in the first box. Then, holding down the <Ctrl> key, click once on other selected boxes. Using this method, non-sequential boxes may be selected.
- To create additional sets of boxes patterned an original set, use *Extrapolate boxes*: add more boxes to an existing card. Highlight the desired range of boxes using a selection method explained in the section above. Type in the number of times you wish to extrapolate the set of boxes (for example: If there are 12 boxes selected how many times should the set of 12 be extrapolated? Extrapolating 2 times a set of 12 boxes will create 24 new boxes). Verify that the predicted enumeration and chronology are correct. Normally the Sierra system accurately predicts the next anticipated volume and issue. However it is important to verify that the predicted enumeration of the first new box will be correct. Frequency, enumeration, and other information in the boxes **from** which the new boxes are to be extrapolated will NOT change. This method may be used to create additional, correctly-enumerated boxes up to the limit of 120 boxes per card.
- To edit an individual issue box, double click the box or line. The system will present a dialog box for the issue selected.
- Staff can insert a **URL** for an individual box, (e.g. <http://www.iii.com>.) This is useful if there is a specific link which is useful for that individual issue box. This should not be confused with the MARC Tag 856 field or any other link to the Bibliographic record. The hotlink will be displayed in the WebPAC as a clickable link from the Cover Date.
- A field exists in which a Public Note or Staff note may be inserted for a specific issue box. The Options provides the opportunity to specify which of the notes (*Public Note or Staff Note*) displays in the issue box in the Sierra Module. This selection is made in the dropdown menu

Admin | Options | Edit tab. The Public Note will always display in the WebPAC, regardless of the selection.

- **HINT:** To create a combined issue box: click on the issue box to edit an issue's cover date and enumeration (typing in the combined dates or enumerations) and then delete the extraneous box (using the dropdown menu **Tools | Box menu | Delete Box** or by clicking once in the box to be deleted to highlight it, then press the <Delete> key on the keyboard.

Holdings Statements

There are three ways to create or to edit holdings statements:

1. Click on the *Record* tab.
 - Insert a textual (non-MARC) holdings statement by inserting the variable-length field “h Library Has” into the checkin record. Refer to the Cataloging Quick Start Guide for information regarding inserting or modifying a variable-length field.
2. Click on the *Holdings* tab. This procedure is known as: Automatic Formatting MARC Library Has
 - Select the buttons **Add new range → Create caption → Insert range details → Apply changes**. Type appropriate holdings data into the appropriate empty fields proposed by the system, including necessary enumeration.
 - The Sierra system configures the data inserted into the fields into a MARC holdings statement
 - If a public note is desired to display with the holdings, any verbal information is typed in as a subfield **z**.
 - All Non-public notes should be inserted as a subfield **x**.
 - In this function, the subfield **w** (which provides the gap separator) is input automatically. A subfield **g** displays a semicolon (;). A subfield **n** displays a comma (,).
 - Use the **View Textual** button to add a textual LIB HAS (Library has) (866) MARC field. The option “Show textual in WebPAC” view displays the text version which is displayed in the WebPac.
3. From the Holdings tab: “Do it yourself” MARC Library Has
 - This is a manually typed MARC statement, based upon MARC cataloging rules.
 - This is done using the option *Advanced function*. This technique requires expertise in MARC cataloging. .
 - The dropdown menu **Tools | Pattern menu | Add pattern or Edit Pattern** is used to configure specific patterns according to MARC cataloging rules.

Check In Functions

- To check in a single issue, select the desired box and click the **Check in** button (or press the letter **C**.)
- To check in a range of boxes, highlight the starting box, hold down the <Shift key>, and highlight the last of the group. Click the **Check in** button (or press the letter **C**).
- Partial receipts. If receiving fewer copies than expected, enter the number received in the popup box; status changes to **PARTIAL**.

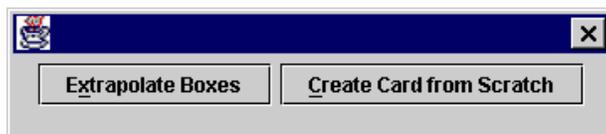
Creating Item Records during check-in

- Check in the checkbox to the left of the *Create item* dialog on the card for items to be created and then click on the **Check in** button, or use from the dropdown menu **Tools | Box menu | Create item for box** to create an item for an issue which had previously been checked in.
- When the system presents the list of available new Item record templates, highlight the line of the appropriate template by clicking on the line. If the system has been configured to present one specific default template, the system will begin presenting fixed-length fields and variable-length fields for insertion of data.
- Insert fixed-length field choices or variable-length field data as prompted by the template.
- Click the **Save** icon to save the item record.
- To view attached item records, go to the *Summary* tab. In the dropdown menu in the upper left of the tab display, next to the “View” choice, select the dropdown menu option: *All Record Types*. The system will then to display all attached records.
- To view an Item record created for a specific box, double click on the issue box in the card display. From within the *Modify Boxes Individually* dialog box, click on the Item Records button. Within the dialog box will be displayed the Item record number associated with the individual issue box. Click on the Item record number box within the **Modify Boxes Individually** dialog box to view the Item record.
- To facilitate the **printing of spine labels** when an issue is received, the *Label type* fixed-length field in the Holdings record itself must have a value other than **n** (NO LABEL).
 - Labels will print during the checkin (or receiving) process when the checkbox to the left of the text *Print labels* box is checked.
 - Labels may be printed at any time via the dropdown menu **Tools | Box menu | Print labels**.

Archiving check-in cards

When all issues on a card have Arrived, the card is considered *Filled*. To archive a card which is filled, it is necessary to perform the following actions:

- From the dropdown menu, select **Tools | Card menu | Archive card**
- A new Holdings record displays with which to associate the new card.
- Select a Holdings record template from the list of choices proposed by the system, or use the default template, if it has previously been selected in **Admin | Settings | Record Templates**
- Edit the archived Holdings record if necessary, adding any necessary notations or information
- The Sierra system will then present two options: **Extrapolate Boxes** or **Create Card from Scratch** in the form of buttons.



- The button **Extrapolate boxes** is used to create a new card using existing parameters. This option will automatically extrapolate (or predict) the proper enumeration of the issues based upon the last issue box on the filled card.

- The button **Create Card from Scratch** is used to totally change card parameters (in the case of some significant change in frequency, enumeration, or other change).
- If the **Create Card from Scratch** option is selected, it will be necessary to totally reconfigure all of the card parameters, including all necessary fields and values.
- Click on the **Submit** button after typing all necessary data and fields. This will result in a totally new card.

More about Editing Holdings Records

Copying records

- From the Holdings record, select from the dropdown **Edit | Copy record**.
- Edit fixed-length and variable-length fields as needed. For additional details on editing fixed-length or variable-length fields, consult the Cataloging Quick Start Guide. When a Holdings record is copied, the associated existing card with all of the existing card parameters will also be copied. If the library does **not** want to copy the card when a Holdings record is copied, contact the Help Desk at Innovative. Contact the Implementation Team if the library is still in the implementation process.

Modifying Groups of Attached Records from the Summary Display

- Select or highlight from the summary tab the records to be modified by clicking the check boxes to the left of the entry. Then select **Edit | Modify group** from the dropdown menu.
- Select the field to modify by field tag, individual field number, or the “down arrow” key on the keyboard to display all of the available fields to modify. Select the appropriate field by using the <Enter> key.
- Double click in the white data box to select a new value to insert, or use the dropdown menu **Edit | Find | Find what | Replace with** to find and replace a specified value in a group of records.
- Use **Edit | Increment data** from the dropdown menu to numerically increment VOLUME, COPY #, and BARCODE fields if the modifications are pertinent to Item records.

Transfer attached records from one Bibliographic record to another

Attached Holdings records can be transferred from one Bibliographic record to another. This may become necessary if duplicate Bibliographic records exist in the system, due to human error, or due to a serials title change.

- Open the source Bibliographic record and from the *Summary* tab, mark the checkbox to the left of the Holdings record or records which should be transferred to another record. Then choose **Edit | Transfer attached** from the dropdown menu. It is also possible to begin this process when an attached Holdings record is open and in the edit function.
- From the **Edit | Transfer attached** dropdown menu, search for the destination Bibliographic record using any index when presented with the “Find Bib” option in the resultant popup menu. Open the selected record and click on the **Use bib** button.
- If multiple windows is enabled in the Login Manager, it is possible to open the destination Bibliographic record first. Then it is directly selectable (by selecting the appropriate Bibliographic record number) from the **Edit | Transfer attached** dropdown menu option.

- After the Holdings record has been transferred to another Bibliographic record, the system may present the option to delete the source Bibliographic record if there are no other records of any type attached to the Bibliographic record from which the Holdings record was transferred.
 - If the Multi Window function is enabled in the dropdown menu **Admin | Settings | Windows**), it is possible to open both the source and the destination Bibliographic records simultaneously and to select the Bibliographic record to transfer to from the **Edit | Transfer attached** dropdown menu.

Deleting Records

- To delete a checkin card, do the following:
 - Retrieve a Holdings record by searching for the Bibliographic record.
 - Select from the dropdown menu **Tools | Card Menu | Delete card**.
 - This choice will delete the card only. The Holdings record will remain in the system.
- To delete both the Holdings record and the attached card, do the following:
 - Retrieve a Bibliographic record using any method.
 - Select the *Summary* tab.
 - Select the record to be deleted from the *Summary* tab by clicking in the checkbox at the left or by clicking on the line of the record to be selected.
 - Click on the **Delete** button.
 - This will delete both the Holdings record and the card. There will be no record in the system that this Holdings record or card ever existed.

Claiming, Binding and Routing

Claiming (Four methods)

The maximum number of claims which can be sent by the system for a late issue is 9.

1. **Searching for claimable issues**

Select the **Claiming** function. The system automatically creates a list of claimable issues based on the **Days before claim** setting in the card configuration. The Sierra system is configured to search using several possible methods: a range of holdings record numbers; a specific review file; or a specific index (for example: title, ISSN, etc.)

 - Click the **Start** button to begin the system scan of eligible issues to claim.
 - Review the Checkin cards as they display. Eligible issues to be claimed will be highlighted by a black outline. A decision can be made title-by-title and issue-by-issue regarding the necessity to claim or not. If the user chooses to claim a single issue, click on the **Claim One** button or, alternatively, click on the **Claim All** button if all of the highlighted issues are to be claimed. The system never “automatically” claims late issues. A decision is always necessary from the library staff member reviewing the list of proposed issues to be claimed.
 - It is optional to add a note to print on the claim letter as each issue is claimed. Type any notes in the dialog box area which is labeled “Note”.
 - Click the **Submit** button to send the claim to the system *serial-claims-awaiting-processing* file.
 - To claim *all* late issues without ever reviewing the individual titles or issues, click in the checkbox to the left of the option **“Show Claim All button in Claiming function”** in

Login Manager | Manager Controlled Options | Settings tab. If this setting is enabled, the system will offer a button on the initial screen in the **Claim** function which will **Claim all** late issues without requiring individual evaluation by the library staff member.

2. Claiming late issues in the card tab
 - This is accomplished by using the dropdown menu **Tools | Card function | Claim**. Using this dropdown menu choice will change the function to a claiming function and claiming options and buttons will become available on the screen.
 - Select the **Claim One** button to claim issues individually, including forced claims (for example, the individual issue has not reached a late status). It is always possible to individually claim issues, even if the status is not late. It is not mandatory that an issue have the status of “Late” in order to claim it.
 - Select the **Claim All** button to claim highlighted issues as a group, following the explanation in section 1 above.
 - Select individual issues or groups of issues as necessary, following the explanation in section 1 above, using <Ctrl> or <Shift> as appropriate.
3. Phone claims (no claim letter is generated in the *serial-claims awaiting- processing-file* which is usually generated)
 - Double-click the desired issue box and edit the **Claims Written** field accordingly. This number will only increment automatically if the System Claiming function is used. However, it is possible to manually increment this number as necessary. If a phone claim is generated, no print files or other types of files for printing or sending will be generated. To retain a history of the number of claims made for a specific title, manually type in the number “1” (or the next sequential number if the original number in this field is not zero).
 - Type in a note to explain if necessary (for example: **phone claim to vendor**). This is important if it is important to know that a “phone claim” was made.
4. Prompt to automatically generate claims during check in.
 - This option can be enabled in **Admin | Options | Setup** tab.
 - When the setting is enabled in Login Manager, a message box containing the message: **Prompt to claim late issues?** displays when closing any record which has been opened. This option may be useful if the same staff member claims late issues and receives current issues.

Print and email claim letters

- Select the function **Send claims**.
- It is possible to limit the list of claim letters by vendor or by location. Click on the appropriate button and select the vendor or location applicable to the limit.
- To sort the list of claim letters, select the **Sort All** button. When the dialog box appears, click on the **Append** icon, and select the record type and fields to sort by. To apply the new sorting rules to the current file, click the **Sort/Save** button.
- To remove claim letters from the list (indicating that the library does not choose to send or to print the claims), highlight the entries to be deleted by clicking in the checkbox to the left of each title, or clicking once on the selected line to highlight individual issues. Alternatively, right-click on a selected issue from the list and select the **Delete entries** choice from the

popup box. It is also possible to select lines in the list and then click on the **Delete** icon in the toolbar.

- Change the focus to the **Email** (electronic serials claiming) dropdown button by clicking on the *Claims to PRINT* button. Use the dropdown menu to change to *Claims to Send via EMAIL*.

It is also possible to move *Claims to send via EMAIL* to a file to be printed. This is accomplished by selecting the button **Move All to print file** to send claims to the print file. Reload the file if print or send options have been changed in any way by restarting the **Send claims** function. This will reinstate all claims which have not been printed or sent to the original file location.

- It is possible to print or to send **All** or **Selected claims** by selecting the appropriate claims before printing or sending via email. As an intermediate step, the system will present a dialog box in which the staff member can choose “all” or “selected” claims. If only some claims had been selected, the remaining claims in the file will be retained until they are either printed or sent or deleted.
- It is possible to print claims using legacy printing or to customize claim forms using the print templates data library.

Routing Serials

Serials can be routed to specific persons using patron records existing in the library system or by using brief routing records that utilize initials. Add Routing records to a Holdings record in the **Routing** function, or from the **Routing** tab within a Holdings record. **Routing** slips can be printed with legacy printing or can be customized using the print templates data library.

Add Routing records to a Holdings record in Routing function:

1. Change to the **Routing** function.
2. Search for Patron records in the patron database.
3. Click the **Add Journal** button
 - Search by any appropriate index for a specific journal to add to the list for the person specified as the routee.
 - After locating the correct Bibliographic record, select the appropriate Holdings record or copy. Click on the **Use** button. This will associate a particular record with a particular routee. When an issue associated with that Holdings record is received, the system will automatically propose the printing of a “routing list”.

Add routing list (of routees) from the Routing tab within a Holdings record:

1. Change to the **Serials Check-in** function.
2. Search for and retrieve the Bibliographic record for the journal using any method.
3. Click on the **Routing** tab to view and to edit the routing list for a specific serial title.
4. Click the **Add** button to search for a Patron record or routing list initials.
5. Click the **Use (this Patron)** button to add the selected patron as a routee.
 - To select the *Priority* of routees on the routing list, select a number from 0-255. A higher number has higher priority.
 - To view the priority and journal count associated with either the Patron or brief Routing record, view the individual record for the routee by searching by name or by initials.
 - If a routing list exists, a routing label will print as issues to be routed are received and checked in.

- It is possible to set an email alert to be sent to the person who is the routee. . The text of the message sent to the routee is: “(Title: Issue) has been received by the library.”

Binding Serials

- Change to the **Binding** function.
- The Sierra system is configured to search using several possible methods: a range of holdings record numbers; a specific review file; or a specific index (for example: title, ISSN, etc.)
- Choose the **Start** button to search for records with bindable issues, based on the *Unit of binding* and *Binding delay* settings in the Checkin card configuration.
- Review the cards that display, using the **Next** button to move forward, and, subsequently, the **Previous** button to move backwards in the file.
 - The **Print pull slip** button may be used to print a slip, listing all of the appropriate issues which are eligible to be bound. The printing of a pull slip does not affect the status of the individual issues in any way. This slip may then be used to take to the shelves to locate materials which should be sent to the bindery. Once these issues are removed from the shelves, the procedure for sending issues to the bindery and changing the issue statuses may be followed as indicated below.
 - Select the **Print Slip** option to print a Bindery slip, if necessary. You can choose to print immediately, add to a print queue, or add the title and immediately print anything already in the queue.
 - Click the **To Bindery** button. A dialog box will then display.
 - Select the appropriate box status from the dropdown menu **To Bind** or **Bind Prep** in the dialog box.
 - Select by using the checkbox to the left of **Keep old Transaction date** to retain the arrived date as well as the date sent to bindery in the issue box.
 - Select the checkbox to the left of **Delete items for individual issues** to remove existing Item records for issues, if individual Item records have been created for each individual issue.
 - Verify that the number of **Copies to bind** and that the **Volume and issues** details for the issues to be sent to the bindery are correct. Then click the **OK** button.

To Bindery function

- Select the **To Bindery** function.
- This method of sending issues for binding allows you to search the database for bindable issues on a title-by-title basis. The subsequent options and actions are similar to the working within the **Binding** function.
- Search for the appropriate title and open the record using any method. The Checkin card will then display.
- **Bindery files.** (Optional purchase). Organizations which have acquired the Binding Interface product may choose to save information to a bindery file when sending issues to the bindery. A bindery file comprises a list of the issues that are ready for binding. The following fixed-length and variable-length holdings record fields are inserted in the bindery file if they are in the record:
 - Library name

- Record number
- Title (from the bibliographic record) or the Bind Title variable-length field (which is an optional holdings record field)
- The option of transferring Bindery files to a bindery using FTP is available if this optional product is purchased.

Check in Bound function

- Select the **Check in Bound** function.
- This function may be used to check in bound serials that have been returned from the bindery.
- Search by for the item to be checked in from the bindery using any method. The checkin card should then display.
- It is also possible to check in bound volumes in **Binding** function, **To Bindery** function, **Serials Check-in** function, and **Claiming** functions. (Select **Tools** | **Card function** | **Bind** from the dropdown menus in any function)
- Several options are available when checking in issues returned from the bindery:
 - Transaction date:** the date checked in from the bindery.
 - Keep old transaction date:** This option will retain the original check in dates in the issue boxes.
 - Delete Items for Individual Issues.** This option will delete Item records for the individual issues if individual issues which are now bound together received individual Item records.
 - Create Item for Bound Issues:** This option provides the possibility of creating an Item record for the completed bound volume. If this option is selected, the system will present the opportunity immediately to create the Item record for the bound volume when the bound issues are received from the bindery.
 - Combine circulation statistics:** This option calculates and copies the circulation statistics from the deleted individual Item records into the new Item record as one combined total.
 - Append Volume to LIB HAS Field:** This option will automatically update the holdings field for the title when a bound volume is received. It will append the enumeration and date of the most recently-received issue as the end of the library holdings statement. Select only one of the below options for the value of the **Append Volume to LIB HAS Field:**
 - Change Status to Bound** and not change the number of boxes (This option will change each issue box status to “Bound” and all boxes are retained on the checkin card).
 - Delete Range of Boxes.** (This option deletes all of the boxes for the bound issues, and all of the the item records for individual issues if they exist.)
 - Reduce Range to 1 Box per Volume.** (This option creates one single box for the bound issues, combining the enumeration in the issue box to include all issues bound together . For example: v.7, no1-6. The remaining boxes are deleted)
 - Change Status to Bound Only.** This option does not alter the number of boxes, does not delete the Item records, and does not update the LIB HAS field which reflects the latest received issue as the closing issue of the library holdings statement.

Create and Edit Vendor Records

- Select the **Vendors** function
- Choose the icon **New** from the toolbar.
- Select a record template from the presented template choices, or use the default template if it has been selected as the default in the dropdown menu **Settings | Record Templates**.
- Select or type in the appropriate fixed-length and variable-length fields as prompted by the template.
- To edit an existing Vendor record, search for the record by *Vendor Name*, *Code*, or *Record#* as index choices.
- Edit the necessary fixed-length and variable-length fields as for any other type of record in the Sierra system.