

## Sierra Serials

Sierra contains various functions to maintain your library's serials, including: journals, periodicals, newspapers, government documents, and monographic series (including pocket parts, etc.). Sierra supports standard and special serials, including advance sheets, pocket parts, supplements, accumulations, reprints, microform reproductions, indexes, etc. Sierra also supports all frequencies, both regular and irregular.

Underlined segments are web hyperlinks. Please click on the link to be directed to the appropriate page in Sierra WebHelp. 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.

This class schedule is flexible and subject to change

### Introduction

- Introduction of trainer and trainees
- [Logging into the Sierra Desktop](#)

### Record types created in serials functions

- Record structure and data fields
  - [Fixed-length fields in holdings/checkin records](#)
  - [Variable-length fields in holdings/checkin records](#)
- [Record types created in serials functions](#)
  - [Bibliographic record display](#)
  - [Checkin \(holdings\) record display](#)

### Creating and maintaining bibliographic records

- [Creating bibliographic records](#)
- [Searching for records in a remote database](#) ( Z39.50 records download)
- [Loading records in data exchange](#)
- [Editing bibliographic records](#)

### Creating checkin records

#### Editing checkin records

- [Editing holdings \(LIB HAS\) fields](#)
- [Using email reminders in holdings/checkin records](#)
- [Transferring attached records](#)
- [Modifying a group of records from the summary display](#)

#### Creating checkin cards

- [How Sierra stores holdings data](#)
- [Issues, supplements and indexes](#)
- [Creating checkin cards advanced mode](#)

- Editing or adding MARC LIB HAS fields
  - Loading coverage data (requires ERM)
- Using email reminders (ticklers)

## **Editing checkin cards**

- Changing the number of levels of enumeration on a checkin card
- Editing parameters for issues and supplements
- Deleting the checkin card
- Archiving checkin cards (optional)
- Using box parameters in the checkin card
  - Creating item records for serials issues (optional)
  - Modifying boxes individually
  - Updating boxes as a group
  - Extrapolating expected dates
  - Inserting boxes before a selected box on a checkin card (issue, supplement, or index)
  - Adding boxes to the end of a checkin card (issue, supplement, or index)
  - Deleting boxes
  - Printing serial labels and routing slips for an issue
- Advanced options for editing checkin cards

## **Checking in serials**

- Retrieving checkin cards
- Checking in an issue
- Scanning SISAC barcodes
- Updating holdings during serials checkin, optional
- Creating item records during serials checkin, optional

## **Serials e-checkin overview**

### **Claiming serials**

- Setting up electronic claiming for serials
- Searching for late issues to claim
  - Searching a range of record numbers
  - Claiming late issues using a review file
- Retrieving a specific serial for claiming
- Sending claims
  - Emailing claims
  - Printing claims
    - Printing with print templates (optional)

## **Binding serials**

### **Additional functions associated with serials**

- [Transferring attached records](#)
- [Linking items to additional Bibliographic records](#)
- [Modifying a group of records from the summary display](#)
- [Deleting records](#)
- [Rapid updating of records](#)
- [Routing serials](#)

## **Using statistics**

### **Creating lists (review files)**

#### **Configuration files and tables**

- [Managing templates for new records](#)
- [Administering setup options](#)
- [Box status labels table](#)

### **Supporting Documentation**

- [Sierra WebHelp](#) – Browse Tab
- [Sierra Knowledge Base](#)

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