



Traverse des Sioux Library System

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9/28/07kg/jd/kg

Serials Control Check-in Procedures

Checking in serials that have a Serials Control record:

From serials control toolbar:

- Click: Check in Issues of a Serial Wizard
- Set properties screen if necessary:
 - Under Search preferences tab: Search index:
 - Bar SICI if wandring in the magazine barcode
 - HR SICI if typing in the magazine barcode
 - Periodical title if typing in the title
 - Enter search library code
 - Click: OK
- Check in: Select search: Search for the serial in hand
 - Enter the search information
 - Change index to be searched to match the search if necessary
 - Click: Search
- Click: Check in issues button
 - Next issue tab: (for next expected issue if correct):
 - Click: Check in now button
 - Update copy list
- Enter Item ID (barcode) in open box
 - OK
 - Copies created screen
 - OK

Other Serial Control options:

- For receipt of more or fewer copies than expected:
 - Click: Different copies button
 - Indicate the correct number of copies
 - Enter notes in the Receipt Comment box if desired
 - Click: Check in now button
 - Enter Item ID (barcode) in open box
 - OK
- For checking in an issue that is out of chronological or numerical order:
 - Click: Different issue button
 - Identify and highlight the different issue
 - Click: Selected issue
 - Click: Check in now button
 - Enter Item ID (barcode) in open box
 - OK

- Different date than expected on this issue:
 - Click: Different issue button
 - Modify issue button
 - Type in appropriate changes
 - Click: Check in now button
 - Enter Item ID (barcode) in open box
 - OK

- Receive more copies than expected:
 - Receive first copy as above.
 - Click: Different issue.
 - Enter number of total issues received
 - Click: Check in copies now
 - Enter Item ID (barcode) in open box
 - OK

- Special issue:
 - Click: Different issue button
 - Special issue button
 - Choose prediction (According to pattern, or Special)
 - Choose the type of special issue (Basic, Supplement, or Index)
 - Type in the volume and numbering for this issue
 - Enumeration may or may not be available
 - Type in the chronology information for this issue
 - Enter notes in the Receipt Comment box if desired
 - Click: Check in now button
 - Enter Item ID (barcode) in open box
 - OK

- Combined issue:
 - Click: Different issue button
 - Click: Combined issue button
 - Check the boxes for the issues that will be combined
 - Type in the changed chronology
 - Click: Check in now button
 - Enter Item ID (barcode) in open box
 - OK

- To unreceive issues that were accidentally received:
 - Click: Modify a Serial Control Wizard
 - Click: Received tab
 - Click: Unreceive issues helper
 - Click: The box before each issue or the box to unreceive all received issues
 - Click: Unreceive issue(s)
 - OK

- Combined issues with more than one issue number:
 - Click: Different issue button
 - Click: Combined issue button
 - Check the boxes for the issues that will be combined
 - Click: Combine Issue Options helper (upper left corner)
 - Click button before option desired
 - OK
 - Click: Combine issues
 - Click: Check in button

- To check in issues that have not been predicted through Serial Control:
 - Click: Check in Wizard
 - Click: Check in Without Prediction
 - Choose prediction (According to pattern, or Special)
 - Choose the type of special issue (Basic, Supplement, or Index)
 - Type in the volume and numbering for this issue
 - Enumeration may or may not be available
 - Type in the chronology information for this issue
 - Enter notes in the Receipt Comment box if desired
 - Click: Check in now button
 - Enter Item ID (barcode) in open box
 - OK

- To unreceive issues that were accidentally received:
 - Click: Modify a Serial Control Wizard
 - Click: Received tab
 - Click: Unreceive issues helper
 - Click: The box before each issue or the box to unreceive all received issues
 - Click: Unreceive issue(s)
 - OK

Note: This removes the incorrectly received issues from Serial Controls, but it is still necessary to remove the issues that were incorrectly received from the database with the Item Maintenance Wizard.