Training

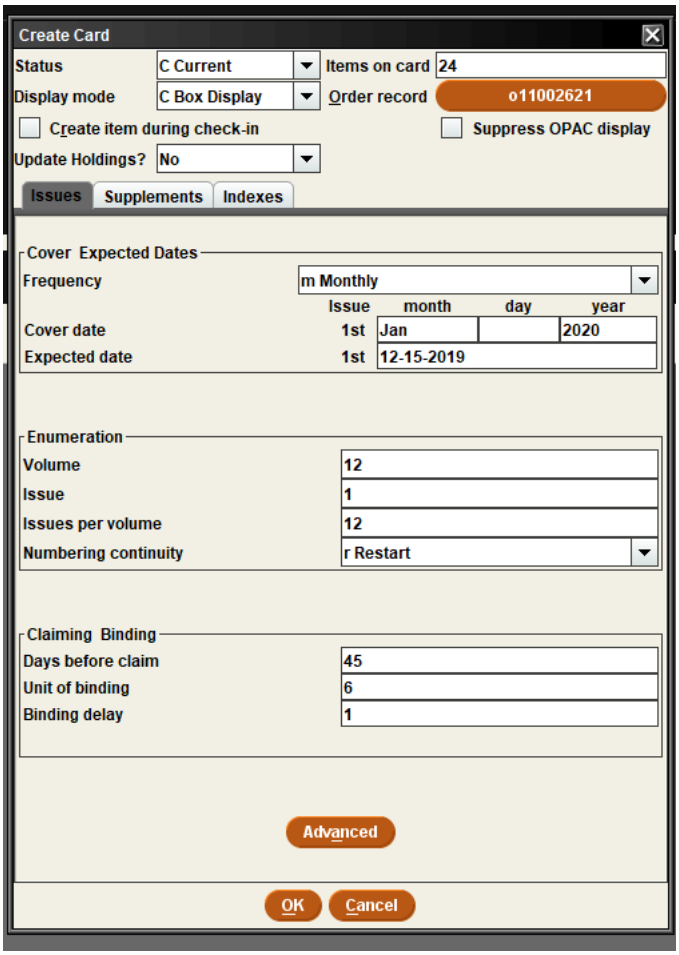
SIERRA SERIALS

Binding

Binding serials in Sierra consists of three steps. First identifying issues to bind and printing the pull slips. Then sending the issues to the bindery which includes updating the checkin card. Finally checking in the bound issues when they return. It is not a requirement that you use all three functions -- For example, if you know which issues need to be bound and don't need to update the card you could skip the initial pull step.

How does Sierra determine issues are ready to be bound?

There are three elements coming from the check in card and the checkin card box.



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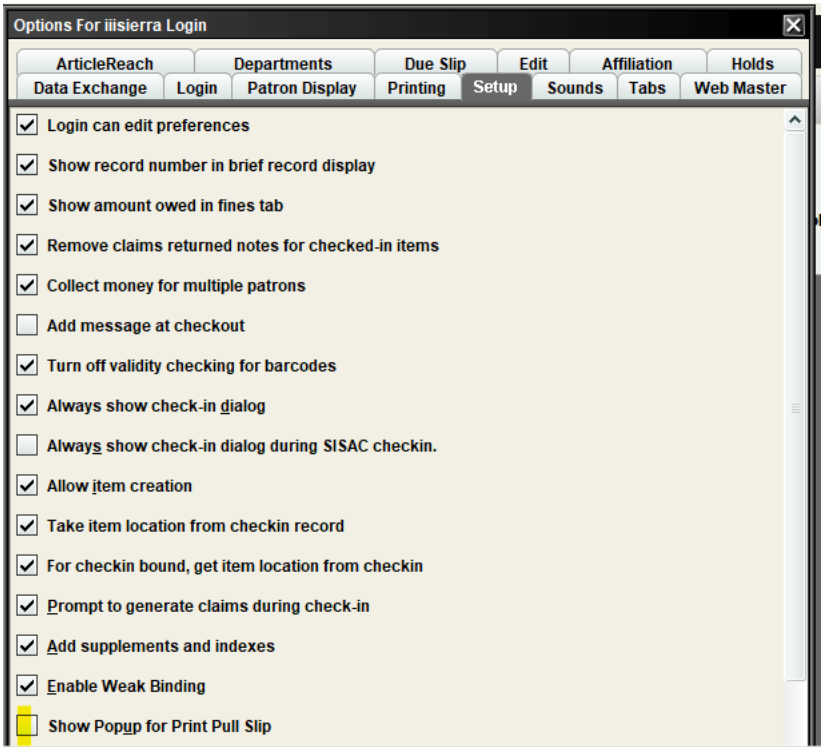
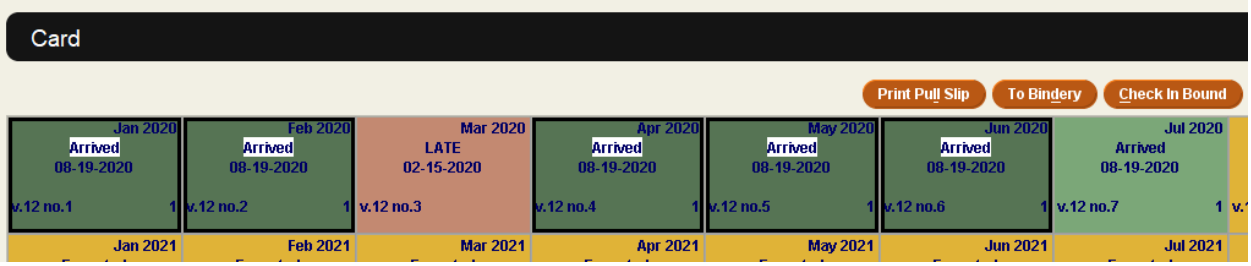
- Binding delay – the number of issues that should remain on the shelf when a Unit of binding is sent to the bindery. For example, we have checked in six issues this year. With a bindable unit of six we could send these off however the shelf would be empty. A binding delay says wait until we check in another issue so there is something on the shelf for patrons to read.
- Copies bound – the number of issues that we wish to fit into a bound volume.
- Box status – to be considered for binding an issue must be either "ARRIVED" in which all copies have been received or "PARTIAL" in which not all copies for that box have been checked in. But at least one has.

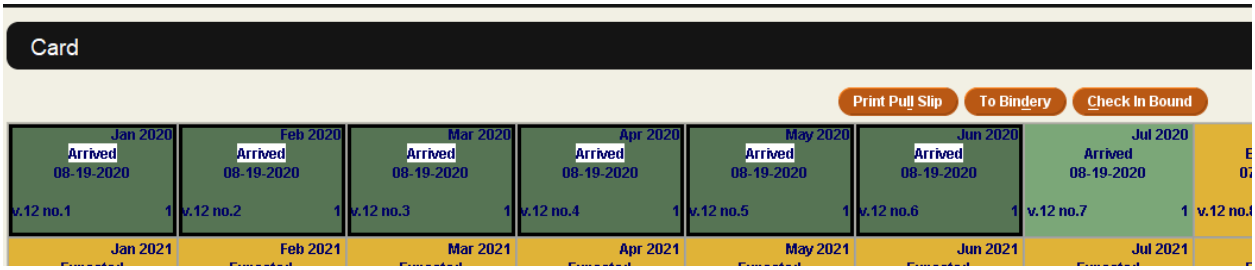
Then there is an SDA Option (Admin | Options | Setup) regarding "weak" or "standard" binding.



- Weak binding (default) is a less stringent method of determine which issues, supplements, and indexes are bindable.
- A bindable range is when:
  - At least one of the boxes has a Status of "ARRIVED" or "PARTIAL". Issues have been checked in and are presumably on the shelf.
  - The issues that would account for the binding delay have been checked in. Either completely or partially.
  - A bindable range then is when enough boxes have the correct status and the minimum number has been met for the binding delay.



- In the above example with a binding unit of six and a binding delay of 1:
  - Six issues have been checked in. The status is "ARRIVED". Note one issue in the range is still "EXPECTED" with the label showing "LATE".
  - The binding delay issue has been checked in and is being included in the calculation of the binding unit even though it isn't going to be bound with this group.
  - The binding delay works to satisfy both the delay and the unit.
- Standard binding searches for a bindable range in which:
  - All of the issues, supplements, and indexes have a status of "ARRIVED" or "PARTIAL".
  - The ending issue number is evenly divisible by the unit of binding from the checkin card.
  - Thus, that range would not be "bindable" until the March issue is checked in.



Searching for issues to bind and printing binding slips – search all serials

With this method you are reviewing a group of records as opposed to going directly to a serial record that you know is ready to be bound. You are identifying issues that need to be pulled from the shelf as the first part of a binding workflow.

1. Chose Binding from the Function list.
2. Chose a method of searching for issues
   a. Select Range to check each holdings record stopping on records with bindable issues. This method is useful to make sure all records are checked however can be time consuming depending on the number.
   b. Select Review file to check a review file of known print issues that the library binds. This can be more efficient then searching the range.
   c. Select Index

3. Chose Start to start searching Sierra for records with issues to bind. When it finds issues to bind based on the card elements and the option, Sierra displays the checkin card with the binding unit highlighted.
4. (Optional) you can select boxes outside of the preselected range.
5. Choose Print Pull Slip on the Card tab. (see below)
6. Choose Next to resume the search for issues to bind or Previous to go back to the previous record.
7. Choose Finish to quit searching.

Select a specific serial and search for bindable issues.

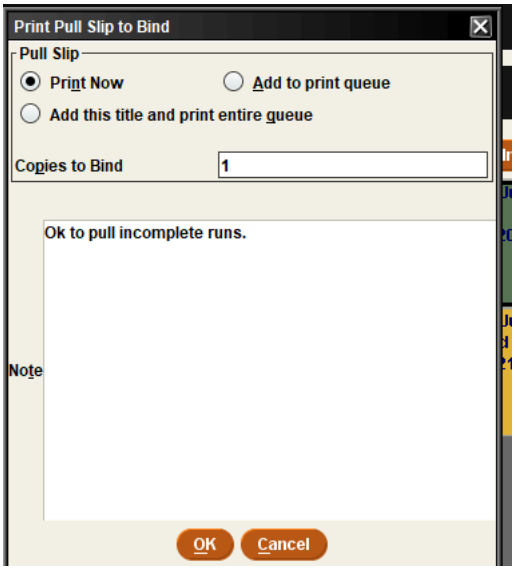
With this method you are going direct to serial issues. Perhaps working from a master list of which serials are bound this month. With this method there are two different workflows to get to the initial serial record.

1. In Serials Checkin mode, search for your serial record or from the To Bindery mode which will eliminate step 3 of having the change the function from Checkin to Bindery.
2. From the Summary of Holdings select the card tab.
3. Right click and select Card Function - Binding or Tools | Card Function | Binding
4. The bindable issues based on card settings and option will display. You can select boxes outside of the preselected range as well.
5. Choose Print Pull Slip on the Card tab. (See below)

Printing the Pull Slip

The pull slip is an optional step in a binding workflow. The assumption is Sierra has identified what needs to be pulled and this slip is generated so staff can know what to pull from the shelves. It can be optional for libraries who work from a master list of serials that get pulled that month.

A Sierra Option determines if a printing and note pop up appears or if the pull slip is sent directly to the printer. Admin | Options | Set up | Show Popup for Print Pull Slip



And here is the resulting pull slip.

Pull Slip for Serials to Send to Bindery _____

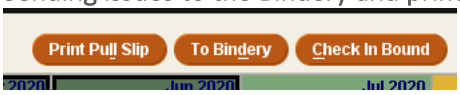
B12159992 BIBLIOGRAPHIC Information
TITLE Good housekeeping
TITLE Good housekeeping [periodical]
PUB INFO New Delhi : Living Media India, 2004-

C11304388 HOLDINGS Information
COPIES: 1 LOCATION: ebper
CKIN INFO Card: Status is Current, 24 boxes, open card

Copy 1 Locations : ebper
Note : Ok to pull incomplete runs.

Volume & Issue #	Cover Date	Notes
12:1	Jan 2020	(A)
12:2	Feb 2020	(A)
12:3	Mar 2020	(A)
12:4	Apr 2020	(A)
12:5	May 2020	(A)
12:6	Jun 2020	(A)

Sending issues to the Bindery and printing binding slips



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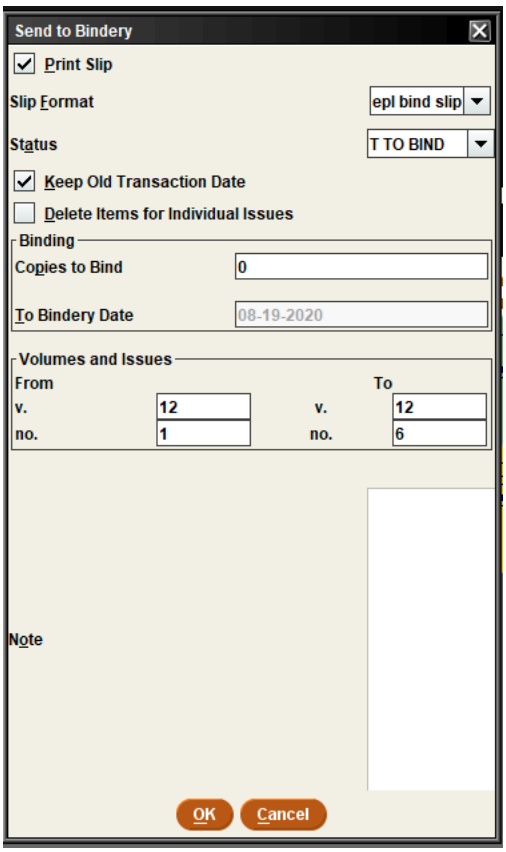
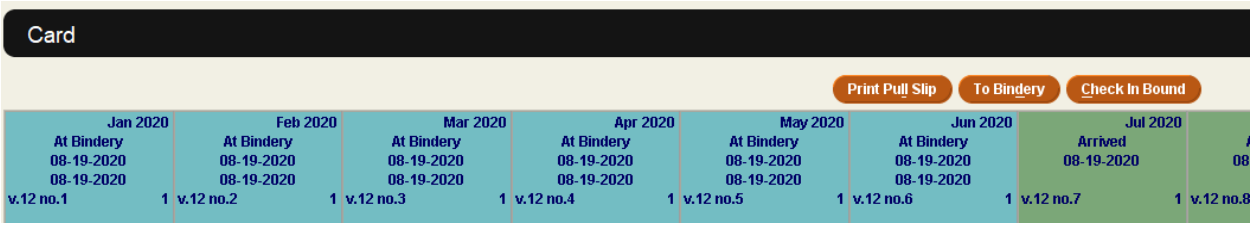
The next sequence is updating the status of the checkin boxes on the checkin card to indicate to users that the issue has been sent to the bindery and an optional step of printing a binding slip. This step is optional as many libraries have that information already on file with the bindery.



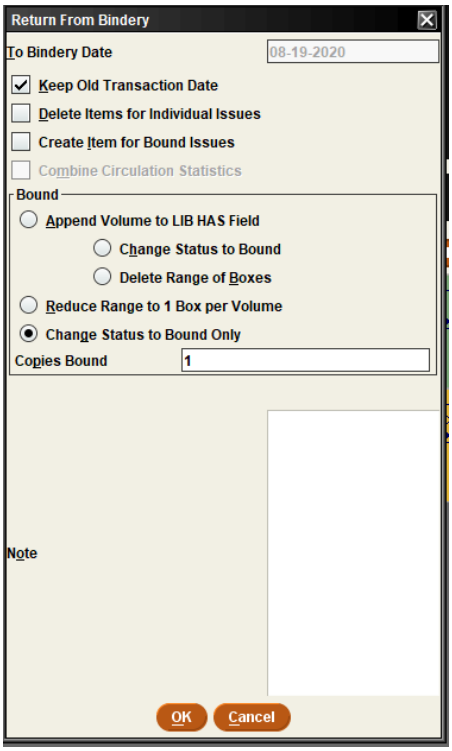
1. Enter the binding function by one of the previously mentioned methods
    a. To Bindery from Function menu
    b. From the checkin card change the function from Checkin to Bind.
2. Click on To Bindery
3. Check the Print Slip check box to print a binding slip (if needed)
    a. See binding slip formats for information on creating binding slips
4. If your library uses bindery files, chose the options from the Bindery Files section.
    a. See Creating and Adding to Bindery Files for more information.
5. Make selections regarding binding as necessary:
    a. Choose a status of In Bind Prep or To Bind
    b. Keep Old Transaction Date which would be the transaction date on the checkin box. Currently that date would reflect the date the issue was checked in.
    c. Delete Items for Individual Issues. If you create item records as part of serials checkin, you will have two opportunities to have Sierra delete the issues. Either now or when processing the bound volumes.

d. Review Copies to Bind which must be at least one.
e. Confirm or edit the date the issues are leaving the library for the bindery. This date will appear on the checkin box note.
f. Confirm the range of issues matches what is in hand.
g. Enter a checkin card public note as needed.
h. Click on OK to complete



Check In Bound

The final sequence is the checking in of the bound volumes from the bindery. We need to update affected item records and the LIB HAS fields, etc.



1. Enter Check In Bound from either the function drop down or from the serial checkin card change the function to Bind.
2. Sierra will select boxes with a Status of “TO BIND” however you may select other issues than those that are highlighted.
3. Click on Check In Bound for the Return From Bindery options
    a. To Bindery Date is typically the date you check in the bound volumes. The option will be disabled if Keep Old (original) transaction date is checked, which is usually the original checkin date.
    b. Delete items for individual issues. A dialog box will display to confirm which individual issues should be deleted. This option will appear again with several of the options under the Bound section.
    c. Create item for Bound volume. This is useful if the bound volume can be checked out or if you need an item record for the catalog or for statistics. Checking this box will enable the next option:
        i. Combine circulation statistics of the individual items associated with the checkin boxes. (Total Checkout, Internal Use, Copy Use and IUSE3 will be combined and inserted into the new item representing the bound issues.
    d. Under the Bound section we have several options however you are selecting one of these.
        i. Append Volume to LIB HAS field. Select this option to add the bound issue information to your Library Has (LIB HAS) field. Selecting this option makes available a second choice.
            1. Change Status to Bound which keeps the original checkin boxes for the individual issues.
            2. Delete Range of Boxes will remove the original checkin boxes for those now bound issues. It will also present the option to delete the items associated with those boxes.
        ii. Or use Reduce Range to 1 box per Volume to collapse the bound issue checkin boxes to one box and again with the option to delete the issue items. Note the system will change the Status of the remaining box to BOUND but does not update the LIB HAS field.
        iii. Change Status to Bound Only which will keep the original issue boxes along with their associated item records (if any) and change the status of the card box to BOUND.
    e. The Copies Bound which typically is not changed.
    f. An optional NOTE that displays in the Public Note field of the checkin box.

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