



Serials Training Exercises

Exercise 1 → Serial Copy Template

Serial Copy Templates specify the item attributes to be applied when a serial copy is received.

1. Click on **Administration** → **Serials Administration** → **Serial Item Templates**
2. Click **Create Template**
3. Enter the item attributes to be applied when your issue is received
 - a. Status
 - i. *Recommend setting Status = Available*
 - b. Shelving Location
 - c. Circulation modifier
 - d. Price
4. Click **Save**

Instructions for completing these exercises can be found in the Serials Section of Sitka's Evergreen Documentation - <https://docs.libraries.coop/sitka/serials.html>

PICK A MAGAZINE FROM YOUR LIBRARY TO USE FOR EXERCISES 2-7

Exercise 2 → Create a New Marc Record

Serials subscriptions are added to bibliographic records. If you cannot find a record for your title, you can import one from Z39.50 or create a new brief Marc Record.

1. Click on **Cataloging** → **Create New Marc Record**
2. Click into the drop down menu to see available templates.
3. Select **Sitka_serial_rda** → Click **Load**
4. Complete a brief MARC record as per Sitka policy. - <http://docs.libraries.coop/sitka/sitka-marc-record.html>
 - a. Brief MARC Records for serials must contain the following fields
 - i. **022** - ISSN
 - ii. **245** - Title
 - iii. **300** - Physical Description
 - iv. **336, 337, 338** - Content, Media and Carrier type
 - v. **650** - Subject
5. Click **Save**

Exercise 3 → Create a Subscription

1. Retrieve the bibliographic record you created in Exercise #2
2. Click **Serials** → **Manage Subscriptions** → **New Subscription**
3. Enter the subscription details
 - a. Start Date
 - b. Label
 - i. *Free text field that is not publicly visible*
 - c. Receiving Template
4. Click **Save**

http://docs.libraries.coop/sitka/serials_subscriptions.html

Exercise 4 → Create a Prediction Pattern & Predict New Issues

1. Click **Manage Predictions** → **Add New** → **Create Pattern**
2. Use the Prediction Pattern wizard to create a prediction pattern
 - a. Enumeration Labels
 - i. Click **Next**
 - b. Chronology Display
 - i. Click **Next**
 - c. MFHD Indicators
 - i. Click **Next**
 - d. Frequency and Regularity
 - i. Click **Next**
 - e. Review
 - i. Click **Save**
 - ii. Detailed instructions for using the Prediction Pattern Wizard can be found here - http://docs.libraries.coop/sitka/prediction_pattern_templates.html#pattern-wizard
3. Click **Create**
4. Click **Predict New Issues**
 - a. Enter the Enumeration labels for the first issue you will receive
 - b. Enter how many issues you want to predict in the Prediction Count field
5. Click **Save**

For more detailed instructions to complete this exercise, please see Sitka's Evergreen Documentation - http://docs.libraries.coop/sitka/create_and_manage_predictions.html

Exercise 5 → Receive Issues

1. Click Manage Issues → Check the check box for **Barcode on receive**
2. Click **Receive Next**
 - a. Enter **Call Number**
 - b. Enter **Barcode**
3. Click **Save**

http://docs.libraries.coop/sitka/receive_issues.html

Exercise 6 → Add a Special Issue

1. Retrieve the bibliographic record you created in Exercise #2
2. Click **Serials** → **Manage Subscriptions** → **Manage Issues**
3. Click **Add Special Issue**
 - a. Enter Publication date
 - b. Enter Issuance Label
 - i. Example “Christmas Special”
4. Click **Save**

http://docs.libraries.coop/sitka/adding_special_issues.html

Exercise 7 → Quick Receive

1. Retrieve the bibliographic record you created in Exercise #2
2. Click **Serials** → **Quick Receive**
3. Select your Subscription from the drop down menu → **Ok/Continue**
 - a. Enter **Call Number**
 - b. Enter **Barcode**
4. Click **Save**

http://docs.libraries.coop/sitka/serials_receiving.html#quick_receive