

# Serials Check-in Tip Sheet

## Introduction

The steps that follow below assume that a PO and check-in record (predictive component) exist for the title.

## Searching and Simple Check-in of Serials with Predictive Patterns

1. Login into the Voyager Acquisitions Module.
2. Choose **Check-In** from the listbar, then **Serials Check-In**.
3. Search for the title in hand by picking a radio button in the **Search For Serials** section. There are five ways to search for a serial check-in record: *Check-In Title*, *UPC*, *SICI*, *ISSN*, and *Other Search*. Two are used most often:

### Check-In Title

This title appears in the **Components Name:** block of a Check-In record. The Check-In Title is the default searching option and will allow you to search by the description provided when the component was initially created. This title can be a bibliographic title or one in an abbreviated form (this is an individual library decision).

### ISSN (International Standard Serial Number)

An eight-digit number (0000-0000) usually found on a cover of an item, but not always. This search will only be successful if the ISSN is present in the Bibliographic record in the Cataloging Module.

- Key-in your preferred search in the **Search For:** box and click on the **Check-In>>** button or press the **Enter** key.

### Points to Remember for searching

- Less is more, but include enough information to ensure a manageable result set.
  - Be alert that the record you are looking at matches the piece in hand.
4. **Select the correct Order** The record window displays the Title, Vendor Code, Components count, and first Holdings location, and Order Type of the listed records. Your search will retrieve all records that match. If there is only one title, it will be retrieved.
  5. Pick the appropriate component from the **Component Name** drop down list (if there is only one component there isn't a drop down list). The next expected issue displays in the **Expected Issue** field. A **Check-In Note** box will display only if one was created for the title.
  6. Check-In (receive) an issue:
    - Review the blocks labeled **Expected Issue:** and **Issue(s) In Hand:** The piece in hand should match the issue represented for the expected issue. If it does not, scroll down to find the issue that does match.

## There are two ways to check in a title:

1. Highlight the proper issue, then choose the **Accept** button, after which the **Serials Check-In – Receive/Mark [selected issue in hand]** window appears.

- To receive an item: Review the information in the **Select Copies to Receive or Mark** window. If all is okay, click in the Receive box to receive or mark all copies for a location. If there is more than one copy click on the box with the + sign, to identify which copy to receive.
  - Select the **Receive** button to check in the item. You will be returned to the **Serials Check-In – Receive/Mark** window at which point you may check in another issue of the same title or **Start Over** with another title.
2. Click on the **Quick Check-In** button.
    - One click receiving: the **Quick Check-In** method bypasses several of the steps employed by the **Accept** method shown above. Click **Quick Check-In** and the issue is received.
    - Use the **Quick Check-In** method if everything is in order (i.e. all of the expected copies have arrived or manual claims of issues do not have to be made)

### Marking and Receiving Unsatisfactory Items

Items that are not satisfactory in some way (i.e. damaged) can be marked to the Problems List for further processing. When marking an item, use the **Accept** method. Either, click the + in the box to identify the copy, or if there is one copy, simply click in the receive box and then click the drop-down arrow in the **Mark Reason** box and select your reason from the list and click on the **Mark** button. *Although this does not appear to do anything, the issue is marked and further action needs to be taken on it from the "Problems" screen in Order Maintenance.*

#### Points to watch for at check-in:

- Does the enumeration/chronology for the issue to be received need to be edited?
  - The title in hand should match the title displayed in the serials record. If it does not, is this a title change?
  - Duplicate issues: Look at the received issues by selecting the **History** button to see if one has already been received.
  - Gaps, missing items: See **History** and/or the **Expected Issues** menu. The piece in hand may be arriving due a claim; several issues arriving at one time; or is out of sequence.
  - Check-In note box: There are unlimited types of notes.
  - If an issue is not checked in the order in which when it is expected, a **System Claim** is generated and it will need to be addressed in the Order Maintenance **Problems** section.
7. Select the **Start Over** button to start check-in for another title.

Based on an Ex Libris Training Department document.