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**Departmental Overview**

The Collection Services Department is responsible for maintaining the Current Periodicals, Bound Periodicals, and Microform collections of Linscheid Library. The department also oversees maintenance and usage of the 2nd floor study rooms and the Digital Humanities Lab, and helps with basic daily maintenance of the 2nd floor copiers.

The Collection Services Assistant is responsible for maintaining all periodical records, supervising the day-to-day activities in the department, and supervising the Student Assistants. The Collection Services Assistant also oversees daily interlibrary loan (ILL) procedures. For more details on ILL procedures, see the Interlibrary Loan Manual (K:\LIBRARY\Collection Services\Interlibrary Loan\Documentation).

Every morning at 8:00am, a Student Assistant performs the Morning Opening Routine. Every evening when the library closes, a Student Assistant performs the Evening Closing Routine. Checklists for these procedures are located on the K Drive (K:\LIBRARY\Collection Services\Student Documents\Documentation\Student Procedures).

Details on Study Room policies and procedures are located on the K Drive (K:\LIBRARY\Collection Services\Study Rooms\Documentation).

Details on Digital Humanities Lab policies and procedures are located on the K Drive (K:\LIBRARY\Collection Services\Digital Humanities Lab\Documentation).
Receiving Current Periodicals

Periodicals refer to any subscription-based material that is published in serial format, including journals, magazines, and newspapers. As new issues are received, they are checked in using the Sierra interface:

![Sierra Interface](image)

Checking In Periodicals in Sierra

1. Open Sierra & enter your username and password.
2. In the Function drop-down on the upper right, select **Serials Checkin**.
3. In the upper left drop-down, select **Journal Title**.
4. Type the title of the periodical
   a. Sometimes multiple records will show. If this happens, select the correct record.
5. Once the record is open, make sure you have the **Card** screen selected.
6. Click on the issue box that corresponds with the item’s correct date/volume/issue, then click **Check In**.
   a. If there isn’t an issue box that corresponds with the item’s date/volume/issue information, you can double click one of the existing boxes to change the information.
   b. If you need to add a new box, right click a box, select **Box Menu**, then **Add Issue Boxes at End of Card**.
   c. Items already checked in will appear green and are labeled as ARRIVED. Items that are EXPECTED will appear yellow. Items that have passed their expected date are automatically labeled as LATE and appear red. EXPECTED and LATE items still need to be checked in.
7. Save and Close the record (top right of the screen) and repeat these steps for the next title.
**Processing Periodicals Mail**

After issues have been checked in, Student Assistants process and then shelve them in the Current Periodicals section.

1. The Collection Services Assistant places the checked in periodicals on the shipping table for the Student Assistants.
2. The Student Assistants stamp all of the periodicals with the date.
3. The Student Assistants will place a blank RFID sticker on the back cover of the journal.
4. Once the items have been stamped and stickered, the Student Assistants will shelve them in the Current Periodicals.

**Claiming Issues of Periodicals**

When an expected issue of a periodical has not arrived within a month of its expected date, it needs to be claimed so that we can request a new copy of that issue from the publisher. Follow these procedures once or twice a month to keep on top of missing issues.

**Claiming in Sierra**

1. Open Sierra and log in.
2. In the Function drop-down, select Claiming.
3. Click Start.
4. You will begin seeing titles that have red issue boxes categorized as LATE, which are issues that have not been received.
   a. Some titles that appear may be government documents (Vertical file)—ignore those and click Next to go on to the next title.
5. If you are certain the LATE issue is missing, select that box and click Claim One.
6. Click OK in the window that comes up.
7. Click Next.
8. Click Yes to save changes.
9. Continue until all records have been searched.
10. In the Function drop-down, select Send Claims.
11. Click OK.
12. Click Print button on top left of screen and check to make sure the issues are not on the Current Periodicals shelf.
13. Delete items from Send Claims list in Sierra.
Claiming in EBSCONET

All missing issues will need to be claimed in EBSCONET (https://www.ebsconet.com). Use the printed list from Sierra to know which titles/issues to claim.

1. Log into EBSCONET with Customer Code and User Name DV30015.
2. Click on Orders.
3. Type in the title of the periodical.
4. Select the record that shows the Start Date of the current year.
5. Click Claim this Order.
6. Check the box next to the issue you wish to claim. If it is not listed, type in the volume, issue, and date for the issue being claimed.
7. The Reason for Claim is almost always be “Listed Issues Not Received.”
8. Click Submit.

EBSCO will send a request for the claimed issue on our behalf. To check the status of a claim, go to Claim Checker in EBSCONET and search by title. To see all claims, do a blank search.

If unable to get a replacement issue, change the issue box status in Sierra to UNAVAILABLE.

Withdrawing Current Periodicals

As the Student Assistants shelve the most recent periodical issues, they will pull all of the old issues at the same time (for titles that are not bound). For example, we keep only one year’s worth of Sports Illustrated, so when we receive July 2018, the students will recycle July 2017. We keep newspapers for one year, so at the beginning of each month, the students will recycle the previous year.

Once per semester (usually during a slow time, such as intersession), a Student Assistant will check the items in Current Periodicals to make sure they reflect what appears on the shelf labels. For example, any title that we keep for one year, should only have one year’s worth of issue on the shelf. Any title that is labeled with BIND will only be pulled from the shelf when it is time to bind the issues (see below).
Periodicals Binding

Binding is ideally done twice a year, usually during December and May Intersessions. It is initiated by the Collection Services Librarian, but the Collection Services Assistant carries out the procedure with the help of Student Assistants.

Pulling Issues from Shelves

1. Log into Sierra
2. In the Function drop-down, select Binding.
3. Click Start.
4. Select the appropriate number of issue boxes for each title that appears.
   a. For example, we bind 1 volume of The Instrumentalist at a time, so you would select all the boxes for any complete volumes.
5. Click Print Pull-Slip for each title.
6. When this process is complete, give the printed Pull Slips to Student Assistants so they can begin to take the items off the shelves.
7. Double check the MS Access Periodicals Database to make sure all titles that need to be bound are accounted for. Located on the K drive here:
   K:\LIBRARY\Collection Services\Librarian Materials

Sending Volumes to the Bindery

1. Rubber band each complete set together with its corresponding pull slip.
   a. Journals should be organized by placing the oldest volume/issue on the bottom of the stack, and then following in chronological order. (Issue 1 should be on the bottom and the last issue should be on top.)
2. Fill out a bindery slip for each set that will be bound together.
   a. The bindery slips can be found on top of the shelves in the Collection Services office.
   b. If 2 volumes of a title are bound together, it will only need 1 bindery slip.
   c. Most bindery slips will prompt you to write the volume number(s) and year(s) for the bound item. Some will also have a spot for the month(s). Always write the first 3 letters of each month in all caps.
   d. If a title doesn’t have enough bindery slips, the template can be found on the K Drive (K:\LIBRARY\Collection Services\Periodicals\Bindery).
   e. Filled out white bindery slips should look like this when they get sent:
3. Replace the pull slips with the white bindery slips before packing up the rubber-banded volumes.
   a. Keep the pink copies of the bindery slips for future reference.
4. Pack the rubber-banded volumes (with their bindery slips) in bindery boxes (located in the Collection Services supply closet on the top shelf near the lockers).
   a. Take the boxes to the shipping room.
5. Log into Sierra.
6. Select the To Bindery Function.
7. Search for each periodical by Journal Title.
8. Select the appropriate number of issue boxes for each title that will be bound.
   a. Reference the pink bindery slips to make sure you select the correct number of issue boxes.
9. Click To Bindery.
   a. Make sure Copies to Bind is 1 and click OK.
   b. This will turn the issue boxes blue.
10. Continue steps 5-8 until you finish with all binding records.
11. Save the pink bindery slips in the Bindery folder located at the Collection Services Assistant’s desk.

The Collection Services Librarian will schedule a pick-up date with the bindery vendor. Bindery Vendor information is kept in the Bindery Folder.
Receiving Bound Periodicals
Bindery shipments are usually returned after 1-2 months. When the shipment arrives, the newly bound volumes will need to be checked in using Sierra and then processed by Technical Services.

1. Unpack books and place alphabetically on carts.
2. Log into Sierra.
3. In the Function drop-down, select **Check In Bound**.
4. Search for each periodical by Journal Title.
5. Select the appropriate number of issue boxes for each title.
   a. Refer to the bound items and bindery slips to make sure the correct number of issue boxes is selected.
6. Select **Check in Bound**.
   a. Check the “Append Volume to LIB HAS Field” and “Delete Range of Boxes”
   b. Copies bound must be greater than 0.
7. Click **OK**.
8. Click **Delete**.
9. In “LIB HAS” enter correct data (change to latest volume/year/month).
10. Click **Apply Changes** and **Submit**.
11. Save changes and check the online CatPac to verify that the changes have been made correctly.
12. For each bound item, write cataloging information on its bindery slip in the area under the volume/year.
   a. Location code (perb)
   b. Bib record number
   c. Volume number(s)
13. Send bound items with updated bindery slips to Technical Services for processing.
14. When books come back from Technical Services, shelve them in Bound Periodicals.
Periodicals Routing

In-House Routing

In-house routing is available to any full-time library employee (librarians and staff assistants). Staff members may request to receive the latest issues of any periodical we are subscribed to.

The Collection Services Assistant will create a routing record for the staff member, and the Student Assistants will deliver the periodical issues to their office/desk. The staff member will return issues to the Collection Services office when they have finished reading them.

Creating a New Routing Record (adding a person):
1. Log into Sierra
2. In the Function drop-down, select Routing.
3. Click New (at the top of the screen).
   a. Enter initials.
   b. Enter name.
   c. Enter address (library department).
4. Click Save.

Editing a Routing Record:
1. Pull up Routing Function in Sierra.
2. Enter first initial and click Search.
3. Double click the name of the person you want to edit.
4. Click Edit (at the top of the screen).
5. To delete a person’s routing record, click File, then Delete Routee.

Adding Periodical Titles to a Routing Record:
1. Pull up Routing Function in Sierra.
2. Enter first initial and click Search.
3. Double click the name of the person you want to edit.
4. Click Add Journal.
5. Search for periodical by Journal Title.
6. Click Use Selected Checkin.
7. Click Use.

Deleting Periodical Titles from a Routing Record:
1. Pull up Routing Function in Sierra.
2. Enter first initial and click Search.
3. Double click the name of the person you want to edit.
4. Select the title you want to delete.
5. Click Delete Journal.
**Faculty Routing**

Periodicals Routing is also available to any faculty member on campus. Faculty will typically contact their liaison librarian to get the process started, then the liaison librarian will contact the Collection Services Assistant.

1. Follow the steps above to create a new routing record for the faculty member and add periodical titles to the routing record.
2. Add the faculty member and the title they requested to the Master Routing List spreadsheet (K:\LIBRARY\Collection Services\Periodicals\Routing).
3. Create a Routing Letter with the appropriate information (volume/issue, office location, faculty member, etc.).
   a. The letter template can be found on the K Drive (link above).
4. Print the Routing Letter and place it inside the periodical issue.
   a. Make sure to place a sticker over the security tag before sending it out.
5. Send a Student Assistant to deliver the issue to the faculty member’s office.
6. Create a calendar reminder for the due date (2 weeks from the delivery date).
   a. When a faculty member is finished with an issue, they can bring it to the library, or notify the Collection Services Assistant that it can be picked up.
   b. If a faculty member keeps the journal past the due date, the Collection Services Assistant will contact them via phone and/or email.