Serials Check-In in Polaris LEAP

Terms:

Serials Check-In – Changes the status of a predicted magazine issue from "expected" to "received". This creates an IN-PROCESS link in the catalogue. This step was previously done by PRLS Staff.

Processing Serials – Adds a barcode, call number, and volume information to prepare the item for circulation. Then check in the item for circulation.

When you receive a magazine follow these steps:

Expected issues need to be checked in before regular processing. Once this step happens the issue is visible to patrons.

1. Login to LEAP using your Polaris Advanced (ADV) user account.
2. Click the **UTLITIES** drop-down menu (located at the very top of the screen) and select **SERIALS CHECK-IN**.
3. This will populate a Find Tool search for the magazines.
   a. Search for the serial title. The Find Tool defaults to an exact title search. You may wish to change it to a **title keyword search** if you have trouble locating the magazine.
   b. Using the LIBRARY LOCATION column, identify the magazine with your library code.
   c. Double-click to open.
4. Sort the list of issues by selecting the STATUS column.
5. Find the issue you are checking in. The status will be "Expected".
6. Ensure that the volume, issue, and date match the item you have in hand.
   a. If they do not match, contact PRLS using the **MAGAZINE QUESTIONS** web form found on the Support Site.
7. Select the box beside the issue you wish to check in and click the CHECK IN button located at the top left-hand side of the screen.
8. This issue is now checked in and ready for processing.

Processing Serials

1. In LEAP, use the find tool to locate the bibliographic record for the magazine you are working with.
   a. You can do a browse search for the serial title.
   b. Select and open the serial.
   c. Open the bibliographic record.
2. Click the ITEMS tab to display the full list of items.

3. Use the filter to search for your Library.
4. Locate the issue you wish to process. Select the item by double-clicking on it.
    a. The item should have an "In-Process" status.
    b. Items are listed in descending order from the check-in date, so the most recent issue "In-Process" should appear at the top of your Library's listing.
5. Click the DETAILS tab.
6. Fill in the barcode and price information in the appropriate fields.
7. Click the CONTROL tab.
8. Fill in the cutter (call number) and volume information in the appropriate fields.
9. Click the SAVE button from the top right-hand side of the screen.
10. Check in the magazine and put it into circulation.