Periodical Linking & Serials Control

Basic Requirements for All Libraries (including those not using serials control)

1. Know the General Skills and be signed up for the appropriate distribution list.
2. Know how to access the WYLD Technotes for Cataloging and Serials.
3. Know how to identify the appropriate serials record to attach holdings. This includes knowing how to distinguish between serials and monographic records, knowing how to distinguish between duplicate serial records, and knowing how to distinguish between open vs. closed serial records. (see Serials Records Not Appropriate for Linking – WYLD Technote)
4. Know how the WULP ("Magazines in Wyoming Libraries") list is generated from the summary holdings statement of the MARC Holdings record.
5. Know how to add, maintain, and remove MARC Holdings statements for serials using the Modify Title cataloging wizard. (see WYLD Technote – Creating MARC Holdings for Serials Summary Holdings Statements)
6. Know how to link individual periodical issues to serial bibliographic records using a base call number, subfield z within a call number, and the LCPER Class Scheme so issues will sort in reverse order.
7. Know how to remove discarded, lost or damaged periodical item barcodes from bibliographic records.
8. Know how to create and remove On-The-Fly circulation records for periodical single issues.
9. Know how to run the On-The-Fly report for finding your library's OnTheFly bibliographic records. (see WYLD Technote – Creating On The Fly Report)
10. Know how to interpret and act on the information within the quarterly "Over 60 Issues" email sent to notify your library of serial titles to which an excessive number of barcodes are linked. (see Serials Maintenance)
11. Know how to access context sensitive online help.
12. Know when to contact the WYLD Office for assistance.

Minimum Requirements for Libraries Using Serials Control

1. Know how to set up Serials Properties. (see Serials Properties technote)
2. Know how to search for established serial control records for your specific library by limiting search to periodical title, control ID or ISSN.
3. Know how to check in predicted periodical issues using "Check In Serials Issue" wizard.
4. Know how to check in unpredicted periodical issues when item does NOT match generated predictions or has no predictions using "Check IN Issues of a Serial" wizard.
5. In the Expected Issues folder, be able to use the Generate Predictions Helper to create more than a single prediction. Know how to edit predictions.
6. Know how to create and delete a MARC holdings record (see Removing MARC Holdings records technote and Creating MARC Holdings records technote).

Intermediate Requirements for libraries using Serials Control

1. Know how to establish a serial control record for a library using "Create a Serial Control" wizard. Understand the important elements of each folder in the serials control record. (see [WYLD Technote – Create a Serials Control Record](#))
2. Know how to edit serials control records, correct check in errors and replace patterns. Be able to clean-up received issues by removing from that folder old received issues.
3. Know how to notify supervisor or WYLD Office to maintain serial bibliographic records when titles change or cease publication.

Expert Requirements for Libraries Using Serials Control

1. Know how to remove a serial control record using "Remove a Serial Control" wizard.
2. Know how to remove Marc Holdings summary holdings statements and copy records for barcoded items associated with the serial.
3. Understand and manage the routing processes, if your library chooses to use this feature.
4. Know what steps to take to perform annual maintenance on serials controls records, MARC holdings records, and linked item records so these all provide an accurate representation of what serial titles and issues your library owns.
5. Understand and manage the claiming process and reports. (see [Reports Skills Checklist](#))
6. Know how to access and use all Reports Wizards related to serials.
7. Know how to remove relevant "most recently arrived issues 599 notes" from the bibliographic record.
8. Know how to maintain serial bibliographic records when titles change or cease publication. Report changes to a supervisor or the WYLD Office if you don't have the knowledge to modify the bibliographic serial record.

Recommended Serials Reports for Libraries Using Serials Control

1. Prediction As Late (Issuelate) Report;
2. Serial Claim Notice (Serclaimntc) Report;
3. List of Your Library's Serial Control Records (Serctllst) Report.

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