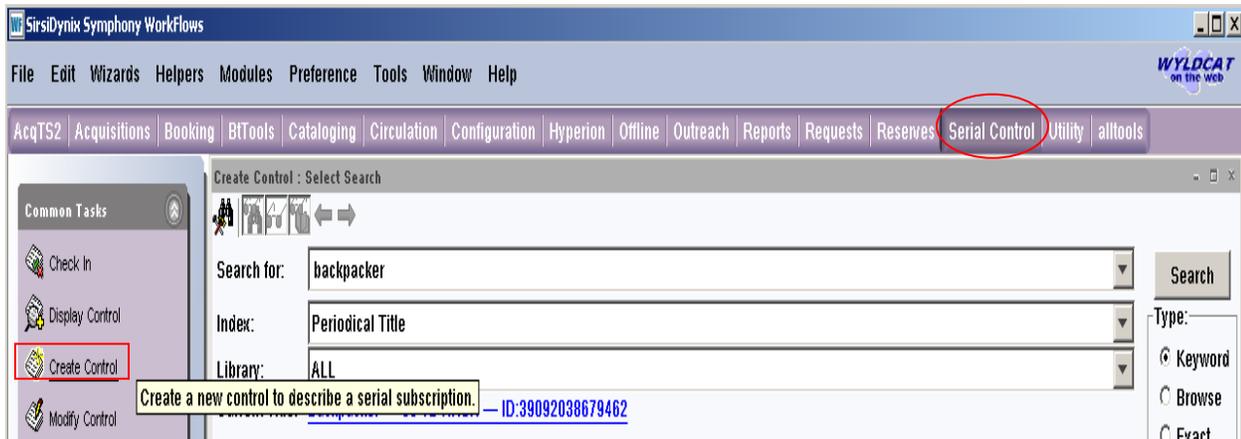


WYLD TECHNOTE : Create a Serials Control Record

1. Using the Serial Control toolbar, select the Create Control wizard in the Common Tasks section.

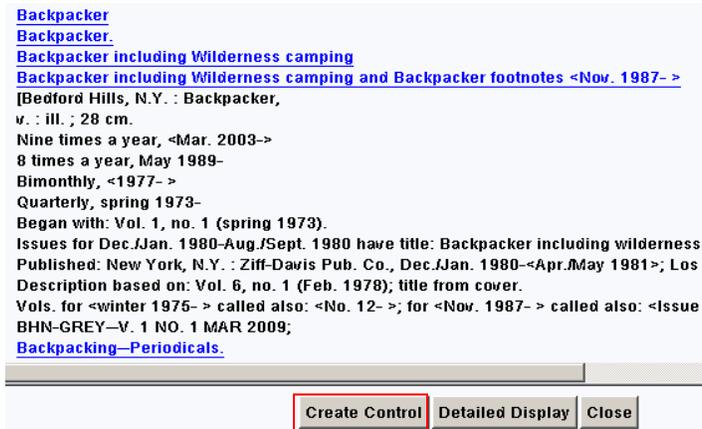
****Right click to confirm the correct Properties settings the first time you use this wizard.****



2. Click on Create Control wizard to open a search window.

3. Search for periodical. Confirm that you have retrieved the correct record.

4. Click the Create Control button as displayed below to begin the process of creating a Control Record.



5. Clicking the Create Control button results in the display of box with additional options, as shown here, if other libraries have also created a serials control record.

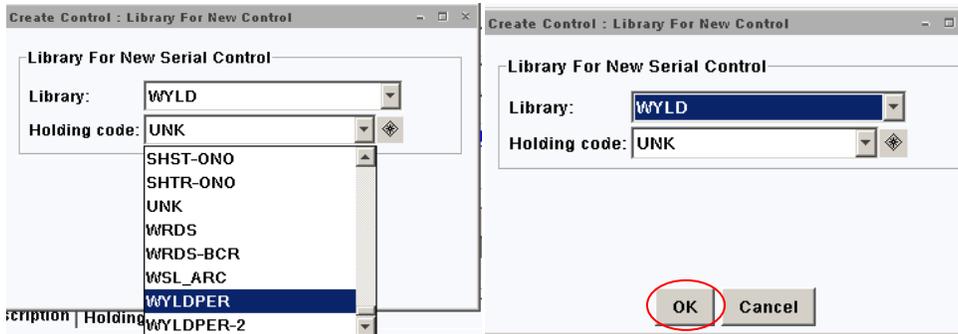
6. Click on Create New Control option.



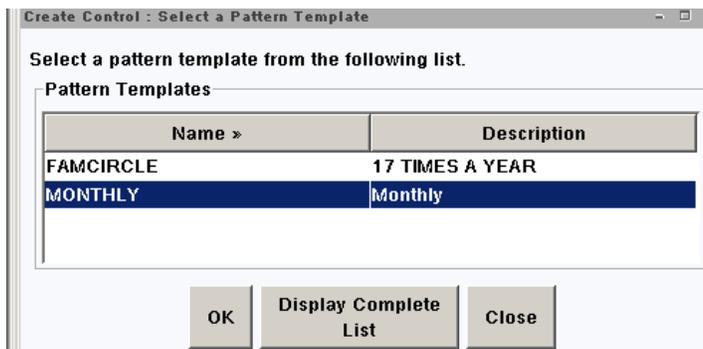
If no other serials control records exist on this bibliographic record, this options window will not display.

7. Select your library and holding code. (Library and a Holding Code can be set as Defaults in Properties of Create Serial Control wizard.) If a new Holding Code is desired, select it from the drop down menu accessed by clicking on the Gadget next to that entry.

8. Click OK button that displays at the bottom of this small window.



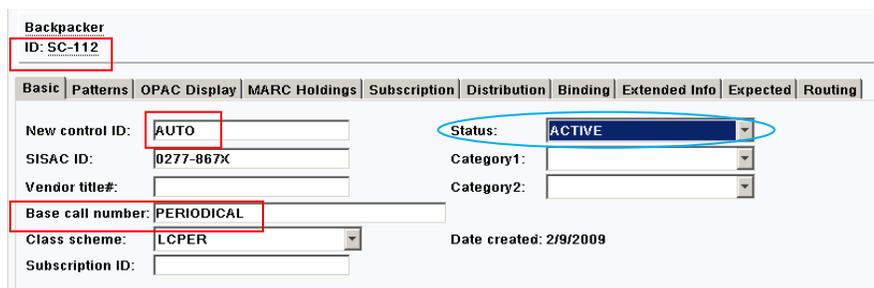
9. Select Pattern for frequency of publication if this selection option appears. Not all titles require this step.



10. Default frequency from Bibliographic record will display.

Click OK button to retrieve Control Record template.

Template for New Serial Control Record: Basic Tab



11. System can auto-generate New Control ID with default: AUTO which will be converted to a number.

12. SIAC ID is the ISSN supplied by the system.

13. Add Base Call Number. Use PERIODICAL or MAGAZINE. A real call number can be used instead or an abbreviated version of either PER, MAG, or an abbreviation of the periodical title itself. Using an abbreviation is particularly helpful if both enumeration and chronology are selected to display in the OPAC Display tab. If the base call number is too long, not all of the combined enumeration/chronology will display.

This Base Call Number is necessary for the system to correctly place the subfield z before the issue information.

14. Select LCPER as the Class Scheme for reverse display of Issues.

15. Status should be ACTIVE. (Some of these options can be set in the Properties of the Create Serial Control wizard.)

16. Move across to next Tab: Patterns.

****Note:** Complete ALL tabs before creating the Control Record.

Template for New Serial Control Record: Patterns Tab

Backpacker
ID: SC-112

Basic Patterns OPAC Display MARC Holdings Subscription Distribution Binding Extended Info Expected Routing

Enumeration pattern

Use	Label	Alpha	Numeric	Continuous	Limit
<input checked="" type="checkbox"/>	V.	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	NO.	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	12
<input type="checkbox"/>		<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	
<input type="checkbox"/>		<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	
<input type="checkbox"/>		<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	
<input type="checkbox"/>		<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	

Chronology pattern

Chronology type: MONTH

Publication pattern

Allow automatic prediction of issues

Publication cycle: 1:M!1:D!

Days to wait before claiming: 15

Days before subsequent claim: 90

17. Defaults displayed above are for a Monthly Frequency. Limit is 12 issues a year.

18. If not using Enumeration, click on the checkmarks next to the Volume and Number labels to remove those labels.

19. Chronology type default is MONTH. If the serial really doesn't publish 12 issues but has combined issues, use CUSTOM chronology type. Select new chronology type from drop down menu.

****Note:** The default Chronology comes from the frequency code in the fixed field of the bibliographic record. If the default Chronology displayed here does not match the frequency of the publication in hand, then the bibliographic record frequency is incorrect. If the publication frequency of the serial changed after the creation of the bibliographic record in WYLD, the bibliographic record won't reflect that change. This means the

bibliographic record needs to be overlaid with an updated OCLC record or corrected manually in WYLD. This mismatch of frequency and Chronology type can result in the generation of error messages when issues are predicted. *When setting the properties on the Create a Serial Control wizard be sure the settings of the Display Bibliographic Description Helper include the option to display the fixed field.

20. "Allow automatic predictions" can be set as an option in the Properties of the Create Serial Control wizard.

21. Publication cycle is correct for a monthly frequency but not for a CUSTOM chronology type. It can be changed by clicking on the Gadget next to that option.

22. Click on the next Tab: OPAC Display if all options here are correct. If Pattern option are not correct, they can be changed to match the frequency for the publication. The steps for creating a Custom Chronology Type are described below.

Template for New Serials Control Record: Patterns Tab (cont.)

Changes necessary for CUSTOM Chronology Type

Backpacker
ID: SC-117

Basic | **Patterns** | OPAC Display | MARC Holdings | Subscription | Distribution | Binding | Extended Info | Expected | Routing

Enumeration pattern

Use	Label	Alpha Numeric	Continuous	Limit
<input checked="" type="checkbox"/>	V.	<input checked="" type="radio"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	NO.	<input type="radio"/>	<input type="checkbox"/>	12
<input type="checkbox"/>		<input type="radio"/>	<input type="checkbox"/>	
<input type="checkbox"/>		<input type="radio"/>	<input type="checkbox"/>	
<input type="checkbox"/>		<input type="radio"/>	<input type="checkbox"/>	
<input type="checkbox"/>		<input type="radio"/>	<input type="checkbox"/>	

Chronology pattern

Chronology type: CUSTOM

Enter custom list: JAN/FEB, MAR, APR, MAY, JUN, JUL/AUG, SEP, OCT, NOV/DEC

Publication pattern

Allow automatic prediction of issues

Publication cycle: 1:M1:D1:M.0:Y;7:M.0:Y;11:M.0:Y

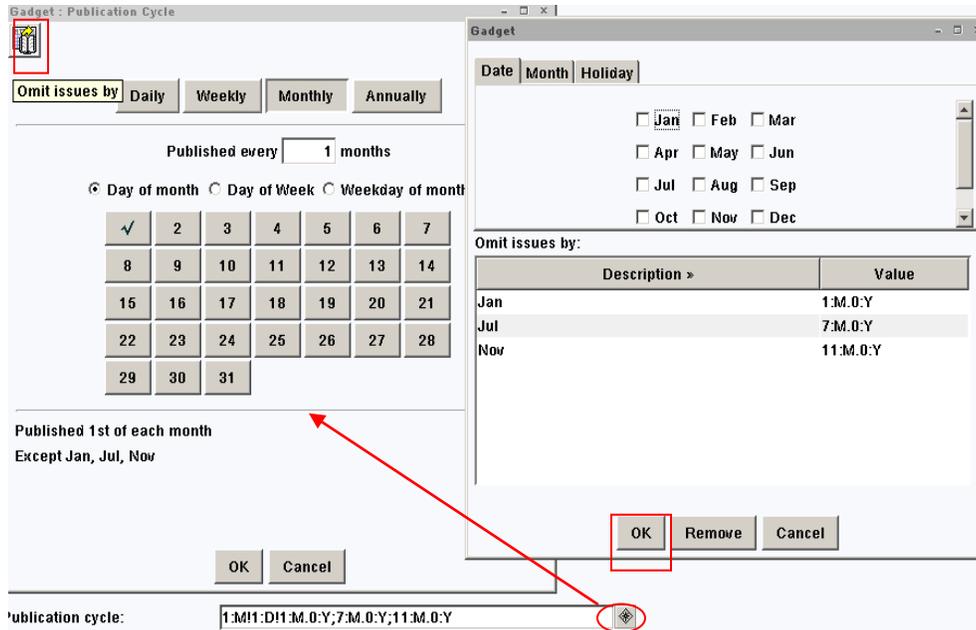
Days to wait before claiming: 15

Days before subsequent claim: 90

23. When Custom Chronology Type is chosen from drop down menu, enter chronology in custom list. Separate entries with a comma, no space between entries is required. Use three letter abbreviations for ALL months and seasons....JUN,JUL,AUG,SEP.....SUM,SPR.

24. Publication Cycle must be changed to match custom chronology type. Click on Gadget to select new options.

Template for New Serials Control Record: Patterns Tab (cont.) Selecting new Publication Cycle



25. Click on the Gadget next to Publication cycle. The results are in display of window with calendar.

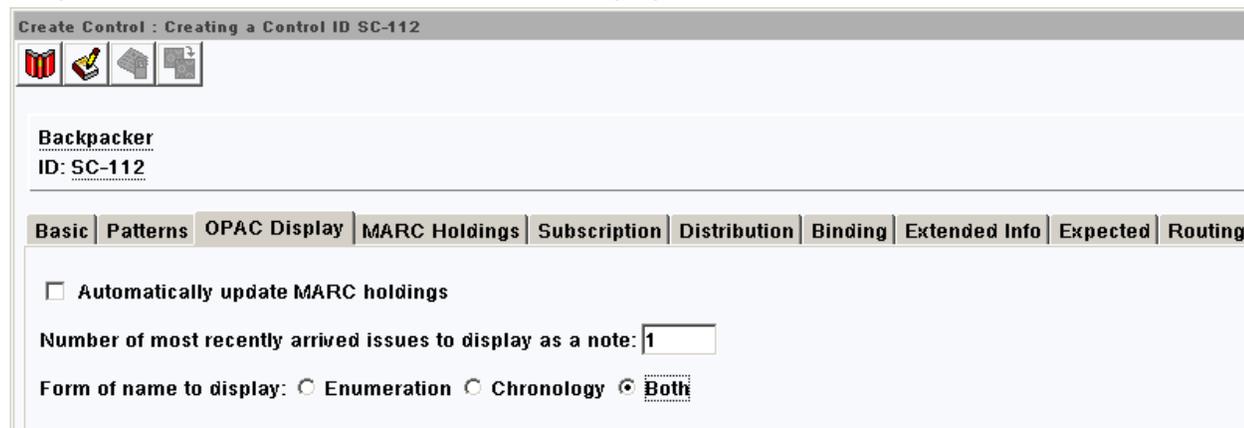
26. Click on Omit Issues Helper in upper left corner of Calendar window to display another new window with options for selecting omissions. This second window is displayed above on the right.

27. Checking each entry that will be omitted places that entry in the description box. The checkmark does not stay next to the entry after it's been placed in the description box.

28. Click the OK button to close this Gadget window after omissions have been selected. This is the window displaying above on the right.

29. Click the OK button to close the calendar and return to Patterns tab.

Template for New Serial Control Record: OPAC Display Tab



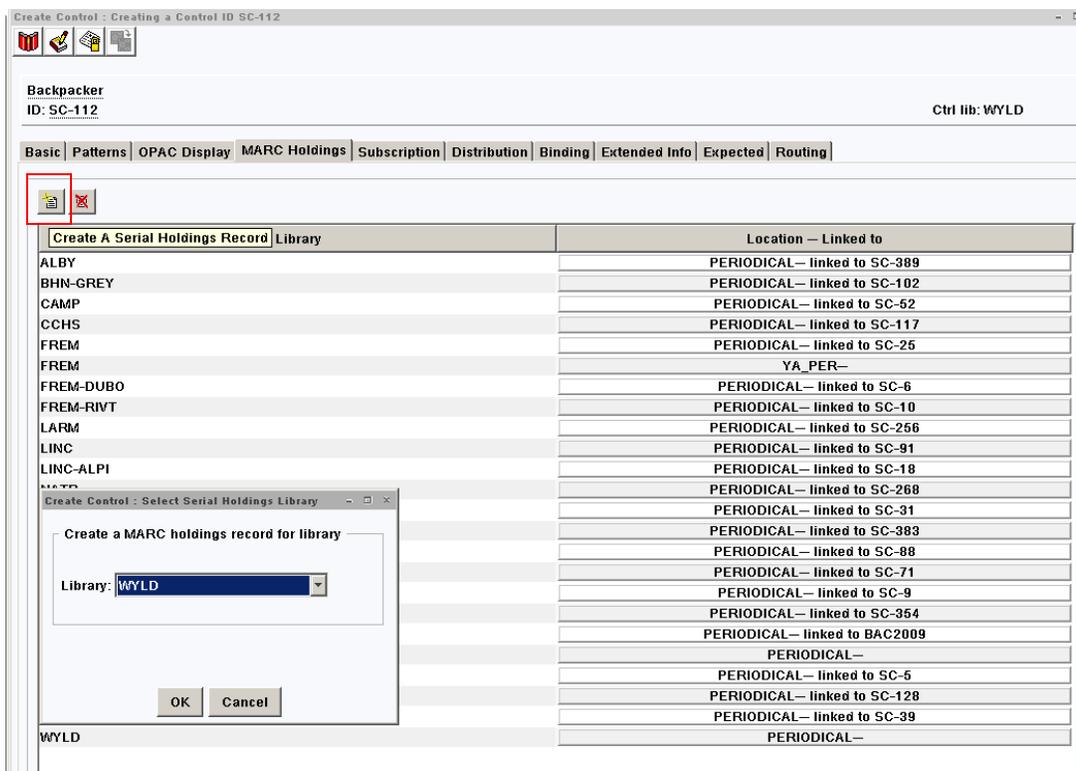
30. Automatically Update MARC holdings: This should *never* be checked.

31. Most recently checked in issues display as a 599 note in the bib record in Workflows and in WYLD. In Workflows this note displays the library as a numerical code. In WYLD this note displays on the Catalog Record tab with a prompt for “Recently arrived:”

****Note:** If a library stops receiving a periodical, it is beneficial to library users if this 599 tag is removed from the bibliographic record as the mostly recently arrived issue would no longer be the current issue.

32. Form of name to display is how the issue information displays in Workflows and in WYLD. If Both is selected here but only Chronology Type is chosen in the Patterns tab (no Enumeration is chosen), the Month will display twice in the call number in Workflows and in WYLD.

Template for New Serial Control Record: MARC Holdings Tab



33. Click on Sub-wizard to open a window with the option for selecting Library for new MARC Holdings Record.

34. Click OK button after library has been selected.

Default MARC Holdings Template

Create Control : Creating a Control ID SC-112

Backpacker
ID: SC-112

Basic | Patterns | OPAC Display | **MARC Holdings** | Subscription | Distribution | Binding

Create Control : Create a MARC Holdings record

Rec_Type	y	Enc_Lvl	4	Entrd	090209	Acq_Stat	
Acq_Meth		Can_Date		Gen_Retrn		Sp_Retrn	
Complete		Copies		Lending		Repr	
Lang	eng	Composit		Updated			

Label	Tag	Ind.	Contents
Location	852		c**REQUIRED FIELD**
Electronic resource	856		
Patterns	853		
Textual holdings	866		
Index holdings	865		
Textual holdings	866		
Suppl text holdings	867		
Index text holdings	868		

Subfield “c” is supplied but defaults to REQUIRED FIELD. A valid Holding Location must be supplied.

Completed MARC Holdings Record

Create Control : Creating a Control ID SC-112

Backpacker
ID: SC-112

Basic | Patterns | OPAC Display | **MARC Holdings** | Subscription | Distribution | Binding

Create Control : Create a MARC Holdings record

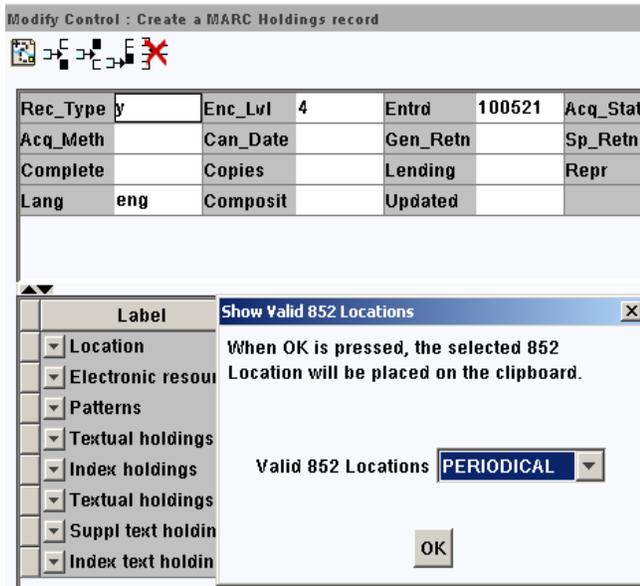
Rec_Type	y	Enc_Lvl	4	Entrd	090209	Acq_Stat	
Acq_Meth		Can_Date		Gen_Retrn		Sp_Retrn	
Complete		Copies		Lending		Repr	
Lang	eng	Composit		Updated			

Label	Tag	Ind.	Contents
Location	852		cPERIODICAL
Electronic resource	856		
Patterns	853		
Textual holdings	866	0	CURRENT YEAR PLUS 1 PREVIOUS YR
Index holdings	865		
Textual holdings	866		
Suppl text holdings	867		
Index text holdings	868		

35. You MUST enter location in UPPER case next to subfield “c” in the 852 tag.

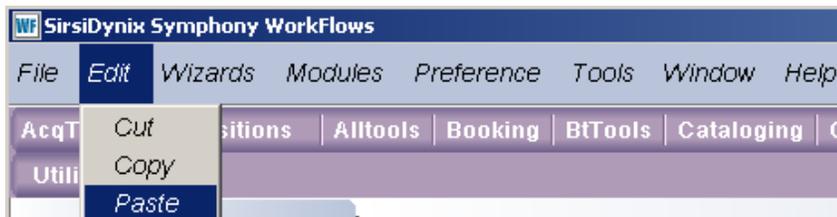
Save Close

If you don't know the holding location to enter in the 852 tag, click on the Helper, indicated above, to see a drop down listing of available holding locations.



After selecting one, click the OK button.

Highlight "REQUIRED FIELD" that appears directly after the subfield c in the 852 tag, as shown in steps 34 and 35. Click on EDIT in the Menu bar and select paste.



The selected holding code will be pasted into the 852 tag replacing "REQUIRED FIELD". ****Note: If you decide to type in the holding code instead of pasting it in from the drop down list, the location must be in UPPER CASE.**

36. Complete the 866 tag for the summary holdings statement. Include a second indicator of zero.

With the cursor on the 866, hit the tab key once. Hit the space bar once. Type a zero. Hit the tab key again to move the cursor to the text area. Enter in UPPER case the holdings statement.

****Note:** There are two 866 tags in the examples of steps 34 and 35. If additional 866 tags are desired, right click on one of the existing tags to reveal the drop down options to add a new tag. Select where you want the new tag to appear. A new blank tag line will appear in the location selected. Enter the 866 tag number and complete the tag line as described above.

Label	Tag	Ind.	Contents
Location	852		cPERIODICAL
Electronic resource	856		
Patterns	853		
Textual holdings	866	0	CURRENT YEAR + 1 PREVIOUS YR
Index holdings	865		
Textual holdings	866	0	STORAGE: 1005 2000
Suppl text holdings	867		
Index text holdings	868		

Add Field Before

Add Field After

Append Field

Delete Field

Save Close

37. Click the Save button to save the new MARC Holdings Record. Then click the Close button to return to the Serials Control Record.

MARC Holdings Tab

Deleting MARC Holdings Record

Editing MARC Holdings Record

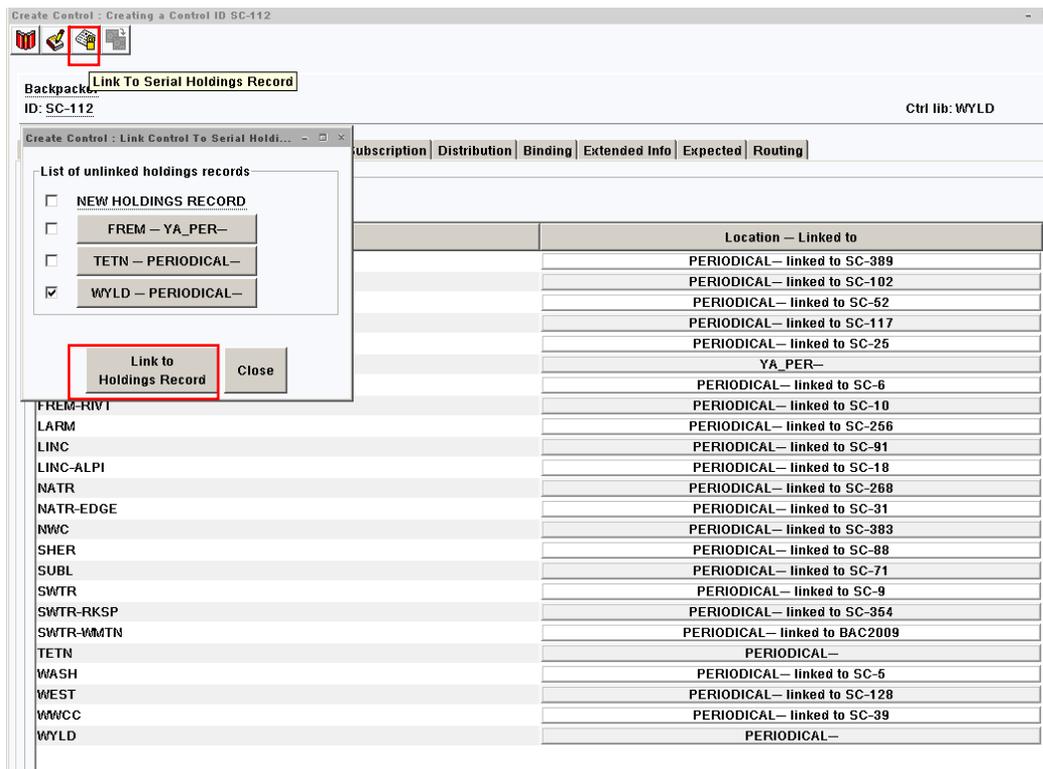
The screenshot shows a 'Delete Serial Holdings Record' dialog box. At the top, it says 'Backpacker ID: SC-112' and 'Ctrl lib: WYLD'. There is a checkbox for 'Remove All Holdings' which is currently unchecked. Below this is a table with columns 'Selected >', 'Library', and 'Location - Linked to'. The 'WYLD' library is checked in the 'Selected >' column. To the right of the dialog is a list of 'Location - Linked to' records, including 'PERIODICAL - linked to SC-389', 'PERIODICAL - linked to SC-102', 'PERIODICAL - linked to SC-52', 'PERIODICAL - linked to SC-117', 'PERIODICAL - linked to SC-25', 'YA_PER-', 'PERIODICAL - linked to SC-6', 'PERIODICAL - linked to SC-10', 'PERIODICAL - linked to SC-256', 'PERIODICAL - linked to SC-91', 'PERIODICAL - linked to SC-18', 'PERIODICAL - linked to SC-268', 'PERIODICAL - linked to SC-31', 'PERIODICAL - linked to SC-383', 'PERIODICAL - linked to SC-88', 'PERIODICAL - linked to SC-71', 'PERIODICAL - linked to SC-9', 'PERIODICAL - linked to SC-354', 'PERIODICAL - linked to BAC2009', 'PERIODICAL-', 'PERIODICAL - linked to SC-5', 'PERIODICAL - linked to SC-128', 'PERIODICAL - linked to SC-39', and 'PERIODICAL-'. At the bottom of the dialog are 'Delete Holdings' and 'Close' buttons.

Deleting: Use the Delete Sub-wizard to retrieve the window shown above on the left. Place a checkmark in the box next to your library. Click Delete Holdings button.

Editing: To open the edit window (displayed above on the right), click on the raised bar with your library's MARC Holdings entry.

Template for Serials Control Record: MARC Holdings Tab (cont.)

Linking MARC Holdings Record to Serials Control Record



38. Click on Link Helper to open the selection window shown.

39. Place a checkmark next to your library's entry.

40. Click Link button to link your library's MARC holdings record to your library's serials control record.

Template for New Serials Control Record: Subscription Tab

41. Defaults for the subscription of a monthly publication are displayed above.

****Note:** The number of copies to receive can be set in the Properties of the Create a Serial Control wizard. (Right click on the wizard to set properties).

If using Acquisitions, enter information in Fiscal cycle and Vendor ID.

42. Move on to the Distribution tab.

Template for New Serials Control Record: Distribution Tab

Modify A Distribution	Copies expected	Copies to add to catalog	Update holdings
WYLDPER	1	0	N

43. Use Modify a Distribution Sub-wizard to make changes. The Holding Code can be changed here.

44. If checking in barcoded issues, change the number of Copies to Add.

****Note:** These options can be set in the Properties of the Create a Serial Control wizard.

45. Click Modify Distribution button to close.

Use the Delete a Distribution Sub-wizard (next to the Modify a Distribution button) to remove a distribution.

46. Skip to Extended Info tab.

Template for New Serials Control Record: Extended Info Tab

The screenshot shows a software window titled "Create Control : Creating a Control ID SC-112". The window has a menu bar with icons for help, back, forward, and refresh. Below the menu bar, the text "Backpacker" and "ID: SC-112" is displayed. A tabbed interface is visible with the following tabs: Basic, Patterns, OPAC Display, MARC Holdings, Subscription, Distribution, Binding, Extended Info (selected), Expected, and Routing. The "Extended Info" tab contains a list of prompts with associated text:

Prompt	Description
PHYSFORM	
NOTE	SHELVE CURRENT ISSUE IN READING ROOM
NAME	

At the top of the list, there are three icons: a left arrow, a right arrow, and a red X (delete).

47. Use NOTE area for staff notes. This note will display when checking in this title.

Use PHYSFORM to enter MICROFICHE, etc. This physical format will **not** display to the public.

Use down arrows next to prompts to change name of prompt.

Use Sub-helpers to add a new note either before or after an existing note prompt. The prompt description will have to be selected when the new prompt is added.

(If only a single note prompt has been used and later you wish to delete that note using the Modify a Serial Control wizard, it will be necessary to use one of the "Insert row" helpers to add a line back in to activate the Delete helper.)

48. If serial is to be routed to staff, click on Routing tab. If no routing is desired, click on Expected tab.

Template for New Serials Control Record: Routing Tab

Basic | Patterns | OPAC Display | MARC Holdings | Subscription | Distribution | Binding | Extended Info | Expected | Routing

Create A Routing	Library	Name	User ID	Rank
------------------	---------	------	---------	------

late Control : Creating A New Routing

Backpacker
ID: SC-116 Ctrl lib: WYLD

Routing Information

Copy: 1 (1 copy available for routing)

Library: WYLD User ID: 29092000038186 rank: 1

Create Routing Close

49. Click on Create a Routing Sub-wizard to open a window for the creation of routing list.

50. Enter User barcode in User ID and set rank for that user.

51. Use the Gadget next to the User ID datawell to search for a user name or barcode.

52. Click Create Routing button and first user in routing list will be added.

Continue adding users to routing list.

53. When finished, return to Expected Tab.

Template for New Serials Control Record: Expected Tab

Create Control Record and Generate Predictions

The screenshot shows the Backpacker software interface. The main window is titled "Create Control : Creating a Control ID SC-117". Below it is a sub-window titled "Create Control : Get Expected Issue Info". The sub-window contains the following fields and controls:

- Backpacker ID:** SC-117
- Ctrl lib:** WYLD
- Prediction Records:**
 - Preview:** 12 expected issues starting with:
 - V.:** 38
 - NO.:** 2
 - Chronology:** MAR 2009
 - Date first prediction:** 02/10/2009
 - Date expected:** 02/10/2009
- Buttons:** Generate Predictions, Save Prediction, Redo Prediction, Close, Create Control, Return to Search, New Search (b), Cancel.

Red boxes highlight the "Generate Predictions" button and the "Create Control" button. A red circle highlights the date selection gadgets for "Date first prediction" and "Date expected".

54. Click on Create Control button.

A window for generating multiple predictions will display as shown above.

This example is for a monthly publication therefore 12 issues are set for the number to preview.

55. If enumeration was selected in Patterns Tab, prompts will be shown here for entry of enumeration.

56. Enter Chronology using abbreviations that match those that the system uses. The system abbreviates all months with the first three letters. E.g. JAN 2009 JUN 2009 JUL 2009 SEP 2009

Refer to the TechNote on *Abbreviations for Call Number Information* for additional examples:

<http://will.state.wy.us/wyld/technotes/cataloging/AbbreviationsInCallNumbers.pdf>

57. Use the Gadgets to enter Date of Prediction and Date Expected.

58. Click Generate Predictions button.

Template for New Serials Control Record: Expected Tab (cont.)

Create Control : Creating a Control ID SC-117

Backpacker
ID: SC-117 Ctrl lib: WYLD

Prediction Records

Preview 12 expected issues starting with:
 V. 38
 NO. 2

Chronology: MAR 2009
 Date first prediction: 02/10/2009
 Date expected: 02/10/2009

Enumeration >	Chronology	Date expected
V. 38 NO. 2	MAR 2009	2/10/2009
V. 38 NO. 3	APR 2009	3/1/2009
V. 38 NO. 4	MAY 2009	4/1/2009
V. 38 NO. 5	JUN 2009	5/1/2009
V. 38 NO. 6	JUL/AUG 2009	6/1/2009
V. 38 NO. 7	SEP 2009	8/1/2009
V. 38 NO. 8	OCT 2009	9/1/2009
V. 38 NO. 9	NOV/DEC 2009	10/1/2009
V. 38 NO. 10	JAN/FEB 2010	12/1/2009
V. 38 NO. 11	MAR 2010	2/1/2010
V. 38 NO. 12	APR 2010	3/1/2010
V. 39 NO. 1	MAY 2010	4/1/2010

Buttons: Generate Predictions, Save Prediction, Redo Prediction, Close

Buttons: Create Control, Return to Search, New Search (b), Cancel

Newly created predictions will display.

59. If correct, click Save Predictions button.

If predictions are not accurate, Click Redo Predictions button to re-create them.

Template for New Serials Control Record: Expected Tab

Generating Predictions

Backpacker
ID: SC-117 Ctrl lib: WYLD

Prediction Records

Preview 12 expected issues starting with:
 V. 38
 NO. 2

Chronology: MAR 2009
 Date first prediction: 02/10/2009
 Date expected: 02/10/2009

Enumeration >	Chronology	Date expected
V. 38 NO. 2	MAR 2009	2/10/2009
V. 38 NO. 3	APR 2009	3/1/2009
V. 38 NO. 4	MAY 2009	4/1/2009
V. 38 NO. 5	JUN 2009	5/1/2009
V. 38 NO. 6	JUL/AUG 2009	6/1/2009
V. 38 NO. 7	SEP 2009	8/1/2009
V. 38 NO. 8	OCT 2009	9/1/2009
V. 38 NO. 9	NOV/DEC 2009	10/1/2009
V. 38 NO. 10	JAN/FEB 2010	12/1/2009
V. 38 NO. 11	MAR 2010	2/1/2010
V. 38 NO. 12	APR 2010	3/1/2010
V. 39 NO. 1	MAY 2010	4/1/2010

Buttons: Generate Predictions, Save Prediction, Redo Prediction, Close

Confirmation
 Predictions created
 OK

60. Confirmation window displays when Save Predictions button has been chose.

61. Click OK button in Confirmation window.

62. Click Close button.

Creation of new serials control record is complete.

If desired, it is possible to create a single prediction instead of a number of predicted issues.

Template for New Serials Control Record: Expected Tab

Create a Single Prediction

The screenshot shows a software interface for creating a control record. The main window is titled "Create Control : Creating a Control ID SC-117". It features a navigation bar with tabs: Basic, Patterns, OPAC Display, MARC Holdings, Subscription, Distribution, Binding, Extended Info, Expected, and Routing. The "Expected" tab is selected. Below the navigation bar, there are sub-tabs: "Create Single Prediction", "Enumeration", "Chronology", "Date expected", and "Receipt status". The "Create Single Prediction" sub-tab is active, displaying a form titled "Create Control : Creating A Prediction". This form includes fields for "Enumeration" (V. 38 NO. 1), "Chronology" (JAN/FEB 2009), "Date expected" (12/30/2008), "Number expected" (1), "Date prediction" (12/30/2008), and "Date to claim" (02/10/2009). There is also a "Comment" field and "Create Prediction" and "Close" buttons at the bottom.

The Expected tab will be blank until Predictions are created.

A single prediction can be created by clicking on the Sub-wizard to Create a Single Prediction.

This results in the display of a prediction template that must be completed with information for the issue being predicted.

Click Create Prediction button.