

Periodicals & Serial Control Skills Checklist

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

1. Know the **General Skills** (<https://wyldlibraries.freshdesk.com/support/solutions/articles/6100028883-8-general-skills-checklist>) and be signed up for the appropriate **distribution list** (<https://wyldlibraries.freshdesk.com/support/solutions/articles/61000284898-wyld-email-lists>).
2. Know how to access training materials and documentation for **Cataloging** (<https://wyldlibraries.freshdesk.com/support/solutions/folders/61000198227>) and **Serials** (<https://wyldlibraries.freshdesk.com/support/solutions/folders/61000198228>).
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** (<https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285515-serials-records-not-appropriate-for-linking>).
4. Know how to access the Wyoming Union List of Periodicals (WULP), also called "Wyoming Periodicals in Print," from GoWYLD.net (https://wyld.ent.sirsi.net/client/en_US/wulp/). Know how this 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.
Creating Marc Holdings:
<https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285520-creating-a-marc-holdings-record-for-serials-summary-holdings-statements>
Removing Marc Holdings:
<https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285521-removing-marc-holdings-records>
6. Know how to attach 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 records for single issues of periodicals. See **Add a Brief Title in Circulation**

(<https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285048-add-a-brief-title-in-circulation>).

9. Know how to run the on-the-fly report for finding your library's on-the-fly bibliographic records. See **Creating an ONTHEFLY report** (<https://wyldlibraries.freshdesk.com/support/solutions/articles/61000290491-creating-an-onthefly-report>).
10. Know how to interpret and act on the information within the quarterly "Over 60 Issues" email sent to your library. This email notifies you which serial records your library has an excessive number of barcodes attached to. See **Serials Issue Maintenance** (<https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285614-serials-issue-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 Serial Control

1. Know how to set up the properties for the serials wizards. See **Serials Wizards Property Settings** (<https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285573-serials-wizards-property-settings>).
2. Know how to search for established serial control records for your specific library by limiting the search to periodical title, serial control ID or ISSN.
3. Know how to check in predicted periodical issues using the Check In wizard in the Serial Control module.
4. Know how to check in unpredicted periodical issues using the Check In wizard in the Serial Control module when the item does NOT match generated predictions or has no predictions.
5. Know how to use the Generate Predictions helper in the Modify Control wizard to create more than a single prediction. Know how to edit predictions.
6. Know how to create and delete a MARC holdings record.

Creating Marc Holdings:

<https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285520-creating-a-marc-holdings-record-for-serials-summary-holdings-statements>

Removing Marc Holdings:

<https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285521-removing-marc-holdings-records>

Intermediate Requirements for libraries using Serial Control

1. Know how to establish a serial control record for a library using the Create Control wizard. Understand the important elements of each tab in the serial control record. See **Creating a Serial Control Record** (<https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285613-creating-a-serials-control-record>).
2. Know how to edit serial control records, correct check in errors and replace patterns. Be able to clean up received issues by removing old received issues from the Received tab.
3. Know how to notify your supervisor or the WYLD Office to maintain serial bibliographic records when titles change or cease publication.

Expert Requirements for Libraries Using Serial Control

1. Know how to remove a serial control record using the Remove Control wizard.
2. Know how to remove MARC holdings records and items attached to a serial bibliographic record.
3. Understand and manage the routing processes, if your library chooses to use this feature.
4. Know how to perform annual maintenance on serial control records, MARC holdings records, and attached item records in order to provide an accurate representation of what serial titles and issues your library owns. See **Ongoing Serials Maintenance** (<https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285615-ongoing-serials-maintenance>).
5. Understand and manage the claiming process and reports. See **Reports Skills Checklist** (<https://wyldlibraries.freshdesk.com/support/solutions/articles/61000288837-reports-skills-checklist>).
6. Know how to access and use all wizards related to serials in the Reports module.
7. Know how to prevent the most recently arrived issues from displaying in a 599 note field in the serial bibliographic record. Know how to remove 599 note fields displaying this information.
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 WorkFlows Serial Reports for Libraries Using Serial Control

1. Prediction as Late (Issuelate) Report;
2. Serial Claim Notices (Serclaimntc) Report;

3. Serial Control Records (Serctlst) Report

Analytics reports for serials can be found in the "Serials" folder in Shared Reports.