



SirsiDynix Symphony 3.2
Serials Control Training Guide

DOC-SERTGEN-S

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Introduction

Overview

The SirsiDynix Symphony 3.2 Serials Control Training Course is designed to provide you with a basic understanding of the capabilities of the SirsiDynix Symphony 3.2 Serials Control software and an overview of navigating those functions in WorkFlows.

The ultimate goal of the Serials Control Training Course is to train essential library staff members so that they in turn act as trainers for others at their branch, campus, or institution.

Who should attend?

This course is intended for Serials department managers, system managers, and other serials staff.

Prerequisite

Essential Symphony Skills – This course teaches basic skills including navigating WorkFlows, searching, changing a toolbar, keyboard navigation, using the Help files, and an overview of wizards.

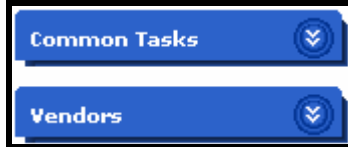
Course Goals

After completing this course, you will be able to:

- Create vendor records
- Search for existing titles
- Create serial control records
- Set up serial predictions
- Receive issues
- Display serial holdings in the online catalog
- Route issues
- Claim issues
-

Serial Control Toolbars and Wizards

The Serials Control toolbar contains the Serials wizards. We will review the function of each wizard and learn to manipulate its default properties to suit your workflow. This guide also discusses the wizards that manage vendor accounts.



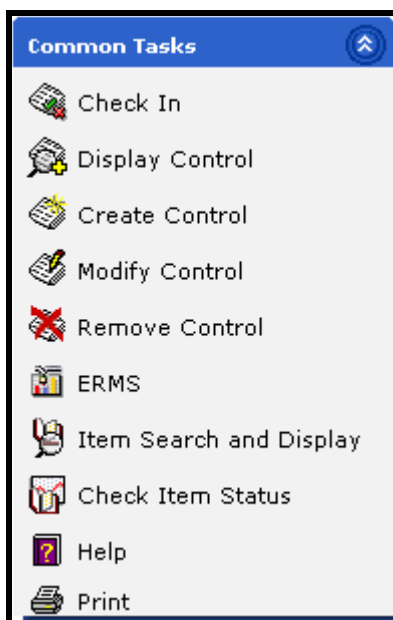
Common Tasks

Contains wizards that display, create, edit, and remove serial control records, check-in issues of a serial, as well as searching, and other common functions.










Vendor


Contains wizards that display, create, edit, duplicate, and remove vendor accounts.

Common Tasks Toolbar

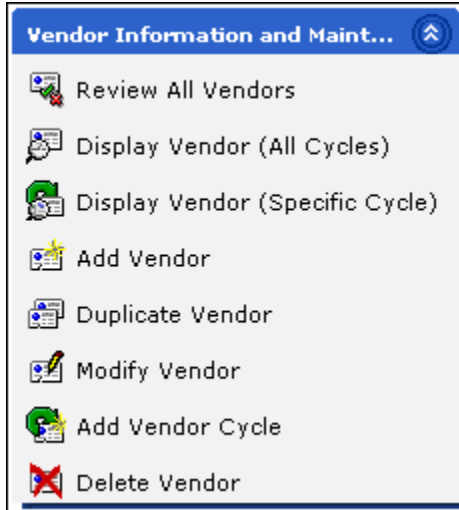


The Common Tasks toolbar contains the following wizards:









	Check In	Checks-in issues of a serial.
	Display Control	Displays detailed information about a serial.
	Create Control	Creates a new serial control record.
	Modify Control	Modifies an existing serial control record.
	Remove Control	Removes a serial control record and its associated issues.
	ERMS	Used to access Serials Solutions
	Item Search and Display	Searches and displays title records, call numbers, and items.
	Check Item Status	Checks the status of an item and proposes an action to be taken.
	Help	Opens the WorkFlows Help file.

	Print	Prints the open record.
---	--------------	-------------------------












Vendor Information and Maintenance Toolbar






The Vendor Information and Maintenance toolbar contains the following wizards:

	Review All Vendors	Displays copy, budget, and performance information for all vendors within a specific cycle.
	Display Vendor (All Cycles)	Displays information about a master vendor record and all of its associated cycles.
	Display Vendor (Specific Cycle)	Displays information about a master vendor record and a specified cycle.
	Add Vendor	Adds a master vendor record.
	Duplicate Vendor	Duplicate a master vendor record and/or a specified cycle.
	Modify Vendor	Modify a master vendor information and/or vendor cycle information.
	Add Vendor Cycle	Adds budget cycle information for an existing master vendor record.
	Delete Vendor	Removes a master vendor and/or vendor cycle(s) records.

Helpers and Tools

	Change Linking Number	<p>This helper displays only when the MARC Holdings tab is being modified using serial control wizards on a title that has multiple linked serial control records. It allows you to associate the current serial control record with an existing, linked MARC Holdings record on another control record for the title.</p> <p>The Change Linking Number helper allows editing the serial control record's link to the current 853 entry. It specifies the linking number that displays in subfield 8 of the 853.</p>
	Combine Issues Options	<p>The Combine Issues Options helper displays only when you are combining two or more predictions into a single issue. This helper allows you to determine how the combined issue will display.</p>
	Configure Options for the Item Search	<p>This helper lets you qualify/limit and sort your search using volume/copy characteristics.</p>
	Create First Row	<p>This tool inserts a new row on a blank tab.</p>
	Delete Row	<p>This tool deletes a row.</p>
	Display Description	<p>This helper displays bibliographic information and volume/copy information about the current item.</p>
	Generate Predictions	<p>The Get Expected Issue Info window displays when you use this helper, allowing you to define prediction record information for a single issue, which may then be used to generate prediction records for any number of additional issues.</p>
	Add Field After Current One	<p>This tool lets you add rows after the box in which the cursor is positioned.</p>
	Insert Field Before Current One	<p>This tool lets you add rows before the box in which the cursor is positioned.</p>
	Link To Serial Holdings Record	<p>This helper displays only when the MARC Holdings tab is being modified using serial control wizards. It allows you to associate the current serial control record with an existing, unlinked MARC Holdings record.</p>
	Make This Pattern A Template	<p>This helper displays only when the Patterns tab is displayed in a wizard that can modify the information. It is useful when there are no appropriate existing templates, and you have customized a serial control pattern that you anticipate will be used in the future.</p>

	Modify Bibliographic Description	The Modify Bibliographic Description helper allows you to modify the bibliographic information of the title associated with a serial control record by displaying a modifiable window with the contents of the Bib tab.
	Replace Patterns	This helper displays only when the Patterns tab is displayed in a wizard that can modify the information. This timesaving helper provides default information for all necessary fields of the Pattern tab in one step, and maintains consistent entries in fields with variable values, such as the Days to Wait Before Claiming and Days Before Subsequent Claim fields.
	Show Issue Detail	This helper displays on the Expected, Received, and Claimed tabs when modifying or displaying a serial control record or when checking in issues. This helper provides the most complete issue information at a time for a particular issue. Depending upon the tab you are viewing, some information is also accessible from the Receipt Status button on the Expected tab, or the More buttons on the Received and Claimed tabs.

Wizard Properties

Each wizard has properties that your library can customize to change the way a particular wizard behaves. This includes changing the default values or the information that displays, and deciding which helpers will be available within the wizard.

You can access the properties by right-clicking any wizard. Three tabs contain information you can change:

- **Behaviors** – Preset selected box values and select which next steps and/or folders will display with a specific wizard or helper. Some wizards will contain an At End of Wizard screen area, in which you can select which buttons display at the end of the wizard workflow. It can also set which action the wizard should automatically perform as the last step of the wizard. This tab only displays to users at the supervisor and system administrator hierarchical level.
- **Defaults** – Preset field values and select which information will display with a specific wizard or helper.
- **Helpers** – Select which helpers will display with a specific wizard or helper. This tab only displays to users at the supervisor and system administrator hierarchical level.

Some of the settings are common for most wizards, such as the default search preferences, while others have properties unique to them. Commonly used properties will be discussed later in training.

Detailed information about each wizard's properties is available in the Online Help.

Search Preferences

On the Defaults tab of most wizards you can set the search options with the following items.

- Preset a **Search Type** by clicking one of the search method options. The default value is Search.
- Preset a **Search Index** by selecting one from the Search Index list. For the wizards dealing with vendors, the default is Vendor ID. For the wizards dealing with control records, the default is Title.
- Preset a **Search Library** by selecting one from the Search Library list. This list is determined by your Library policies. This option is only available when using the control record wizards.

Getting Started

Overview

The Serial Control module manages the status and receipt of the serial collection of your library. Serials Control configuration policies are used to gather statistics about control records, as well as track claims and claim responses. Configuration policies are also used to create and modify pattern templates used for receiving serials.

The serial group of reports maintains and gathers statistics about the serial collection.

Note Placing orders with serial vendors is covered in the Acquisitions Training Guide.

The SirsiDynix Symphony 3.2 structure for serials is based on the following concepts.

Record Types

The Serial Control module uses the following record types.

Vendor/Order Record

Create vendor records for linking. If you link to vendors through orders, you may also need to create the order. Serials must be linked to vendors for claiming.

Title Record

Every title under the Serial Control module must have a title record in SirsiDynix Symphony 3.2. If the fixed field used to reflect frequency in the serial format record is coded, the Serials module uses that information when putting the title under serials control.

Create a title record first. MARC records used for serials include fixed field codes that indicate the title's frequency, which is automatically used for predictions when the serial control record is created.

Serial Control Record

An item is placed under serial control by creating a control record attached to the item. The serial control record contains publication pattern information that allows SirsiDynix Symphony 3.2 to predict issues. The serial control record also holds a link to the appropriate order or vendor record.

Create a serial control record to set up a serial for receipt. This record contains publication pattern information that lets SirsiDynix Symphony 3.2 predict issues. It also links to either the order or the vendor record to establish claiming.

Prediction Record

Once the control record is complete, you may predict expected issues. A prediction record linked to the serial control record represents each expected issue. Prediction is necessary for claiming.

Receipt Record

Received issues are represented by receipt records that only staff can see.

Receipt of an issue can be reflected in public display automatically in three ways.

- A note in the bibliographic record.
- Barcoded issues can display “copy” records.
- Receipt of an issue can update MARC holdings records.

Receipt records are created by predictions that are received, or they are created individually at the time of receipt. Receipt records display to staff only, but may be represented to the public as either copies added to the catalog, notes of recently arrived issues, or as MARC holdings records.

Claim Record

Claim records associated with the prediction record represent claimed issues. You may print claim notices using the Report utility.

Claim records may be created under the following circumstances:

- Predicted copy not received by the date to claim.
- Multiple predicted copies that are only partially received.
- Created by library staff for other reasons.

Maintain claim records primarily through the serial group of reports.

Routing Record

Routing lists are contained in routing records associated with the control record.

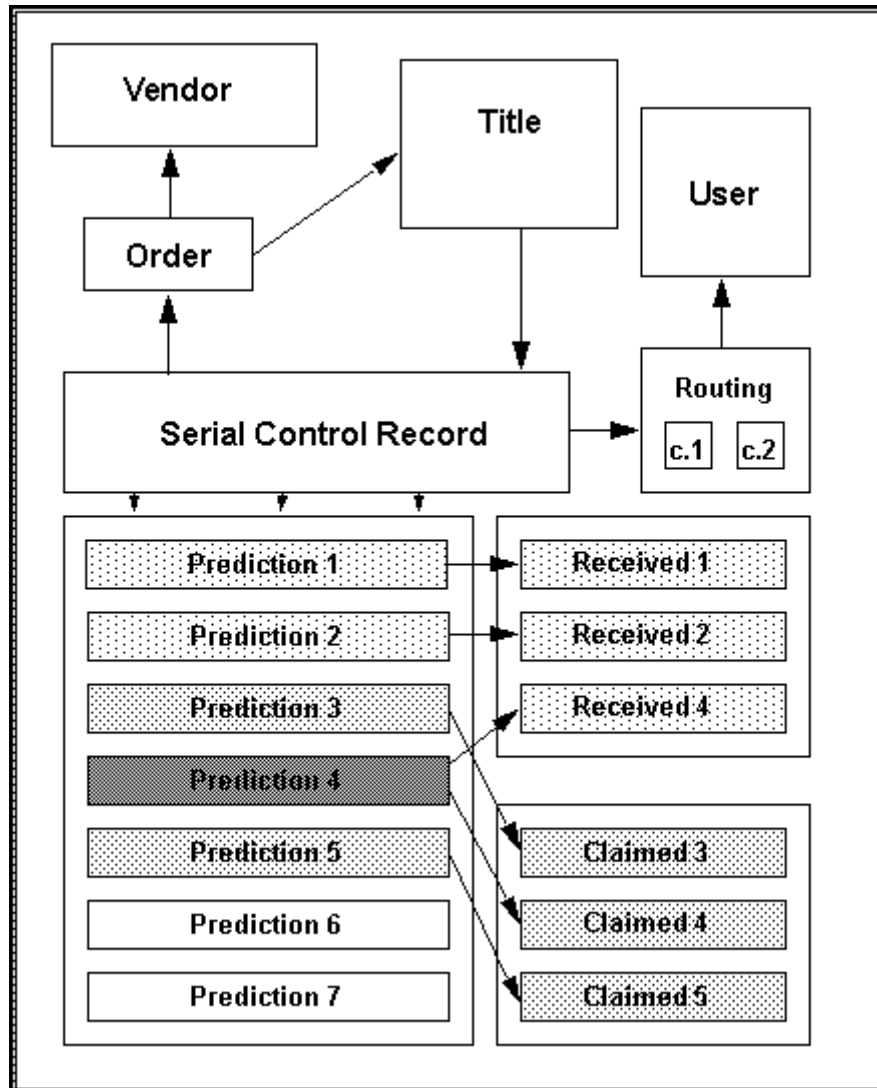
Routing records are created on the Routing tab of the serial control record. You may print routing lists for individual copies at the time of receipt.

Note	For more information about records, see the WorkFlows Online Help.
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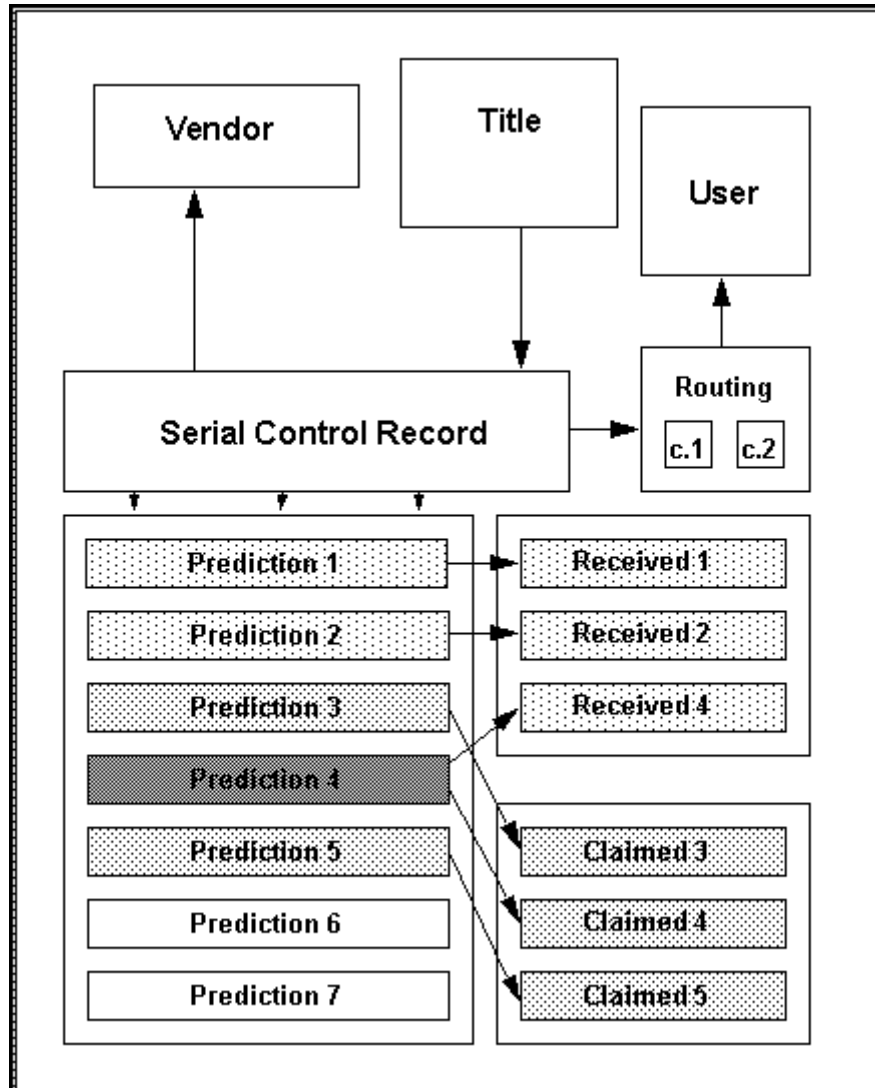
Record Relationships

The following database diagrams show the relationship between the different types of data. Each example is related to a particular system configuration setting.

Example: Linking to Vendors through Orders



Example: Linking Directly to Vendors



Vendor Records

Overview

Before you begin using the Serial Control module, define or identify basic title and vendor information. Vendor records are shared with the Acquisitions module, if your library has this module. When we discuss vendor records in the Serial module, keep in mind that many of the fields may pertain to Acquisitions only.

You will need vendor records if your library will issue claims for missing issues.

Vendor Session Settings

When you access the Vendor wizards, the Session Settings window appears. The options offered here allow you to establish default values for the wizards and customize your workflow. For more information regarding the properties, refer to the online help.

The following Session Preferences are required fields:

- In the **Maintenance Library** box, select the library whose vendor information you have permission to modify. The options that appear are set in the policy file.
- In the **Display Library** box, select the library whose vendor information you have permission to display. The options that appear are set in the policy file.

Note For more information, see the FAQ "What is the difference between a Maintenance Library and a Display Library" in the online help.

- In the **Fiscal Cycle** box, select a fiscal cycle from the drop-down list that you will typically use for this session. Use numeric values only.



Add Vendor

The Add Vendor wizard adds a new vendor record.

Add Vendor Properties

When you access the Add Vendor wizard, the Set Properties window appears. The options offered here allow you to establish default values for creating vendors and customize your workflow. For more information regarding the properties, refer to the online help.

Add Vendor : Set Properties

Display property page: Wizard Startup Never

Defaults

Vendor Creation

Auto-generated Vendor ID:

Group 1: [Dropdown]

Group 2: [Dropdown]

Group 3: [Dropdown]

Ordering allowed:

Paying allowed:

Vendor Cycle Creation


Order claim period: [Text Box]

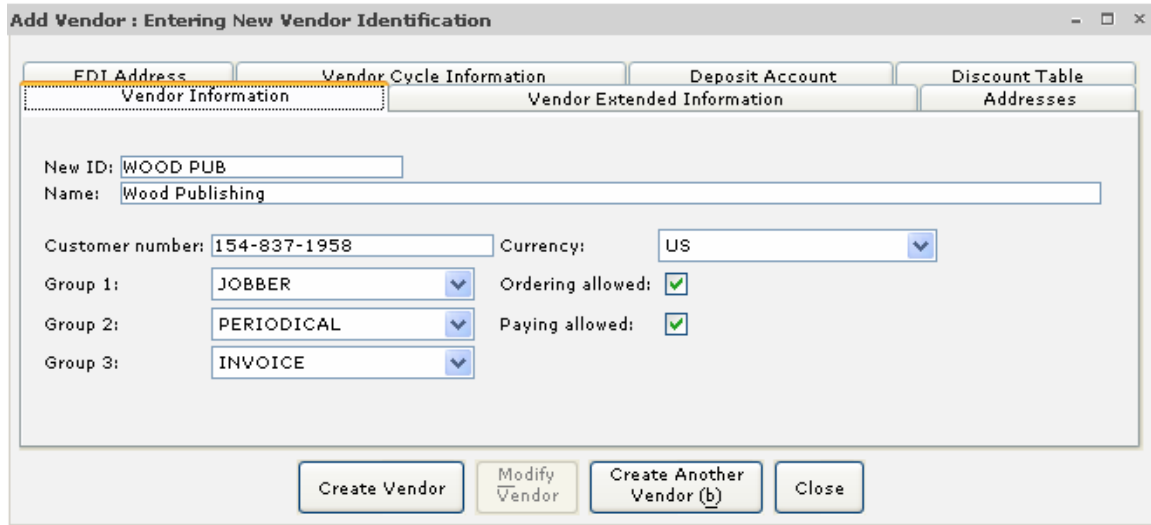
Order cancel period: [Text Box]

% encumbrance allowed: 100

OK Cancel

To create a new vendor record

1. On the Vendor Information and Maintenance toolbar, click the **Add Vendor** wizard .
2. If the Set Properties window appears, verify the defaults and click **OK**. The following window appears:



Add Vendor : Entering New Vendor Identification

FDI Address Vendor Cycle Information Deposit Account Discount Table

Vendor Information Vendor Extended Information Addresses

New ID: WOOD PUB
 Name: Wood Publishing

Customer number: 154-837-1958 Currency: US

Group 1: JOBBER Ordering allowed:

Group 2: PERIODICAL Paying allowed:

Group 3: INVOICE

Create Vendor Modify Vendor Create Another Vendor (b) Close

Vendor Record Tabs

Vendor Information Tab

The Vendor Information tab contains basic information fields which apply to all fiscal cycles for this vendor.

3. In the **New ID** box, type the vendor ID (up to 20 characters) that you want to assign to the vendor, or select **AUTO** to let SirsiDynix Symphony 3.2 generate an ID for you.

Note SirsiDynix recommends not using spaces or punctuation in the New ID.

4. In the **Name** box, type the full name of the vendor (up to 70 characters). This is a searchable field.
5. In the **Customer number** box, type the customer number of the vendor (up to 20 characters). This is a searchable field.

6. The policy file controls the choices in the **Currency** box. You cannot change the currency after you place orders with a vendor.
7. The policy file controls the choices in the **Group** boxes. This is optional information used for reports and acts like demographics. Be sure to implement these groups in your policies before creating vendors.
8. Click **Ordering allowed** to permit ordering from this vendor.
9. Click **Paying allowed** to permit payments to be made to this vendor.

Note At any time during this process, you can click **Create Vendor** to save and continue entering information. After adding or changing information, click **Modify Vendor**.

10. Click the **Vendor Cycle Information** tab. The following window appears:

Vendor Cycle Information Tab

The Vendor Cycle Information tab contains fields that may be different in each fiscal cycle.

11. In the **Order claim period** box, type the number of days from the date mailed to wait before issuing item claims.
12. In the **Order cancel period** box, type the number of days from the date mailed to wait before canceling an order. This can also pertain to canceling a partial order.
13. Click the **Deposit Account** tab. The following window appears:

The screenshot shows a software window titled "Add Vendor : Entering New Vendor Identification". It has four tabs: "Vendor Information", "Vendor Extended Information", "Addresses", and "Discount Table". The "Vendor Extended Information" tab is active, and within it, the "Deposit Account" sub-tab is selected. The main area contains a text field with "Vendor cycle:2006" and two input boxes: "Deposit amount:" (empty) and "% encumbrance allowed:" (containing "100"). At the bottom are four buttons: "Create Vendor", "Modify Vendor", "Create Another Vendor (b)", and "Close".

Deposit Account Tab

14. If you have a deposit with a vendor, type the amount in the **Deposit amount** box.
15. In the **% encumbrance allowed** box, type the maximum percentage of the deposit amount allowed before the systems displays a message warning against further ordering.
16. Click the **Discount Table** tab. The following window appears:

The screenshot shows the same software window as above, but now the "Discount Table" sub-tab is selected. The main area contains a text field with "Vendor cycle:2006" and a "Discount type:" label followed by three radio buttons: "Monetary", "Quantity", and "None". The "None" radio button is selected. At the bottom are the same four buttons: "Create Vendor", "Modify Vendor", "Create Another Vendor (b)", and "Close".

Discount Table Tab

17. Select **Monetary**, **Quantity**, or **None** for a discount with this vendor.

Note If you select **Monetary** or **Quantity**, you can add the discount now by clicking **Create Vendor**. Additional fields display (see below) to enter the monetary or quantity discount.

Add Vendor : Modifying Information for Vendor WOOD PUB; 2006; ROCKEFELLR

Vendor Information		Vendor Extended Information		Addresses	
EDI Address	Vendor Cycle Information	Deposit Account	Discount Table		
Vendor cycle: 2006					
Discount type: <input checked="" type="radio"/> Monetary <input type="radio"/> Quantity <input type="radio"/> None					
Up to:	\$0.00	Discount percent:	0.00		
Up to:	\$0.00	Discount percent:	0.00		
Up to:	\$0.00	Discount percent:	0.00		
Up to:	\$0.00	Discount percent:	0.00		
Over:	\$0.00	Discount percent:	0.00		

18. Click the **Vendor Extended Information** tab. The following window appears:

Add Vendor : Modifying Information for Vendor WOOD PUB; 2006; ROCKEFELLR

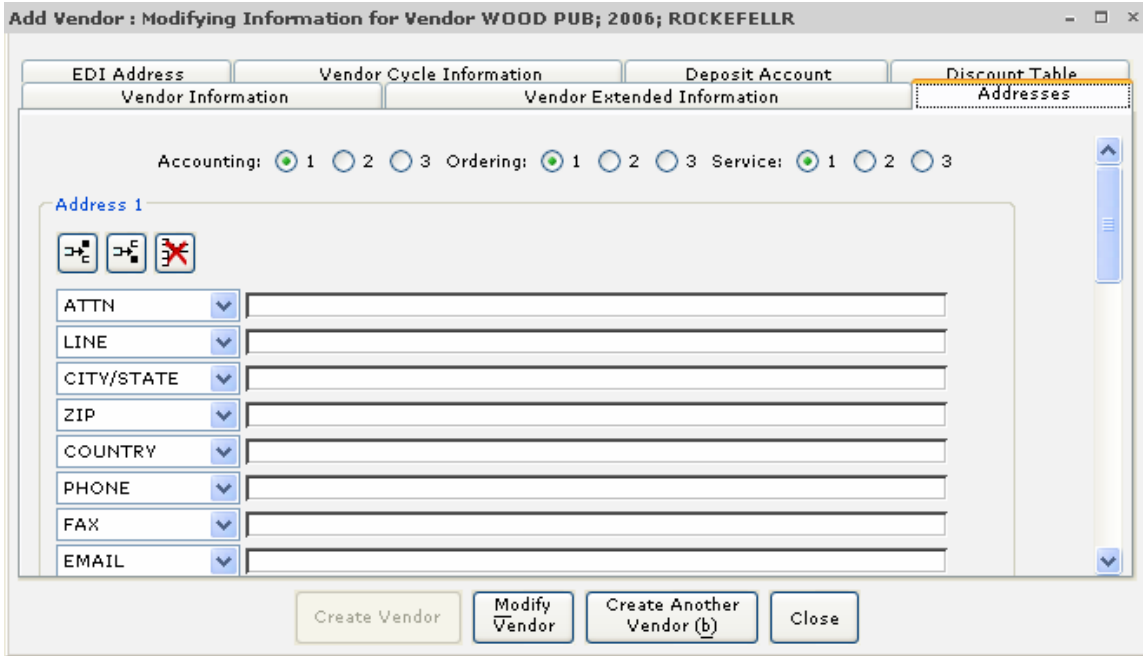
EDI Address	Vendor Cycle Information	Deposit Account	Discount Table	Addresses
Vendor Information		Vendor Extended Information		Addresses
Extended Info				
<input type="button" value="↔"/> <input type="button" value="↔"/> <input type="button" value="✖"/>				
ALTVENDNUM				
SAN				
TERMS				
NOTE				
COMMENT				

Vendor Extended Information Tab

The Vendor Extended Information tab lets you annotate the vendor record. The most common extended information entries are Note and Comment. This is a good place for staff notes, because only staff sees this information. You can also use the Extended Info as a limiting criterion on vendor reports.

19. Enter any extended information for the vendor.

- Click the **Addresses** tab. The following window appears:



Addresses Tab

There is room to specify a different address for vendor accounting, ordering, and service. These fields are important for claiming.

- Select the number for the particular address and make the appropriate entries in each field.

Note If you need space for additional addresses, use a Note or Comment field in the Vendor Extended Information tab.

- Click the **EDI Address** tab. The following window appears:

Add Vendor : Modifying Information for Vendor WOOD PUB; 2006; ROCKEFELLR

Vendor Information Vendor Extended Information Addresses

EDI Address Vendor Cycle Information Deposit Account Discount Table

EDI Address

TRANSTYPE	
X12_ISA01	
X12_ISA02	
X12_ISA03	
X12_ISA04	
X12_ISA05	
X12_ISA06	
X12_ISA07	
X12_ISA08	
X12_ISA11	

EDI Address Tab

The EDI Address tab contains a series of fields for EDI (electronic) ordering.

23. When finished entering information on all of the tabs, click **Create Vendor** if you have not already done so, or click **Modify Vendor** to save the additional information you have added.
24. Click **Create Another Vendor** to create a new vendor record

-Or-

Click **Close** to exit the Add Vendor wizard.




Duplicate Vendor

The Duplicate Vendor wizard copies existing vendor information into a new vendor record. You can create a new vendor record with a vendor cycle record.

The Duplicate Vendor wizard only copies vendor fields. It does not duplicate vendor cycle fields such as those contained in the Vendor Cycle Information, Deposit Account, or Discount Table tabs.

To duplicate a vendor record

1. On the Vendor Information and Maintenance toolbar, click the **Duplicate Vendor** wizard .

2. If the Set Properties window appears, verify the defaults and click **OK**.
3. Search for a vendor. You can select vendors by fiscal cycle and library. You can locate specific vendors by customer number, vendor ID, or vendor name.

-Or-

Select the Vendor ID **Index** and leave the **Search for** box empty to retrieve a list of all vendors for that fiscal cycle and library.

4. Click **Search**. If more than one record matches your search, select the one you want and click **Duplicate This Vendor**. The following window appears:

Duplicate Vendor : Duplicating Information from EBSCO; 2005; ARROWOOD

Search for: Search

Index: Vendor ID

Fiscal cycle: 2005

Library: ARROWOOD

Current: [EBSCO --- 2005 --- ARROWOOD](#)

Type: Search Browse Exact

FDI Address	Vendor Cycle Information	Deposit Account	Discount Table
Vendor Information	Vendor Extended Info	Addresses	

Library: ARROWOOD

New ID:

Name:

Customer number: Currency: US

Group 1: Ordering allowed:

Group 2: Paying allowed:

Group 3:

5. Type the vendor's **New ID**, or type **AUTO** to let SirsiDynix Symphony 3.2 assign an ID.
6. Type the new fund **Name**.
7. Modify the remaining information as needed.

Note The information on the Vendor Information tab is copied from the original vendor record, however the information on the Vendor Cycle Information tab is not copied from the original vendor record.


8. Click **Duplicate This Vendor**.
 9. Click **Close** to exit the Duplicate Vendor wizard.
- Or-**
- Click **Duplicate Another Vendor** to continue working.



Modify Vendor

The Modify Vendor wizard lets you change or add information to the vendor record or vendor cycle record. You can modify only one vendor cycle record at a time.

To edit a vendor record

1. On the Vendor Information and Maintenance toolbar, click the **Modify Vendor** wizard .
2. If the Set Properties window appears, verify the defaults and click **OK**.
3. Search for a vendor. You can select vendors by fiscal cycle and library. You can locate specific vendors by customer number, vendor ID, or vendor name.

-Or-

Select the Vendor ID **Index** and leave the **Search for** box empty to retrieve a list of all vendors for that fiscal cycle and library.

4. Click **Search**. If more than one record matches your search, select the one you want and click **Modify This Vendor**. The following window appears:

Modify Vendor : Modifying Information for Vendor EBSCO; 2005; ARROWOOD

Search for:

Index: Type: Search
 Browse
 Exact

Fiscal cycle:

Library:

Current: [EBSCO --- 2005 --- ARROWOOD](#)

FDI Address	Vendor Cycle Information	Deposit Account	Discount Table
Vendor Information	Vendor Extended Information	Addresses	

Library: ARROWOOD

New ID:

Name:

Customer number: Currency: US

Group 1: Ordering allowed:

Group 2: Paying allowed:

Group 3:


5. Edit any fields necessary, and click **Modify This Vendor** to save your changes.
 6. Click **Close** to exit the Modify Vendor wizard.
- Or-**
- Click **Modify Another Vendor** to continue working.



Add Vendor Cycle

The Add Vendor Cycle wizard allows you to add another fiscal cycle to an existing vendor.

To add a vendor cycle to an existing vendor record

1. On the Vendor Information and Maintenance toolbar, click the **Add Vendor Cycle** wizard . The Set Properties window appears:

2. Select the **New fiscal cycle**.
3. In the **Order Claim Period** box, type the number of days to wait before issuing item claims. This step is optional.

4. In the **Order Cancel Period** box, type the number of days to wait before canceling an order. This can also pertain to canceling a partial order. This step is optional.
5. Click **OK**. The Vendor Lookup window appears.
6. Search for a vendor. You can locate specific vendors by customer number, vendor ID, or vendor name. If more than one record displays, select the one you want, and click **Add Vendor Cycle**. The following window appears:

The screenshot shows a window titled "Add Vendor Cycle : Entering Cycle Information for EBSCO; ARROWOOD; 2005". The window contains a search section with a "Search for:" text box, a "Search" button, an "Index:" dropdown menu set to "Vendor ID", a "Library:" dropdown menu set to "ARROWOOD", and a "Current:" label with the text "EBSCO --- 2005 --- ARROWOOD". Below this is a tabbed interface with four tabs: "Vendor Information", "Vendor Cycle Information", "Deposit Account", and "Discount Table". The "Vendor Cycle Information" tab is active and displays a form with the following fields: "Vendor cycle: 2006", "Library: ARROWOOD", "Fiscal cycle: 2006", "Order claim period:" with an empty text box, and "Order cancel period:" with an empty text box. At the bottom of the window are four buttons: "Add Vendor Cycle", "Modify Vendor Cycle", "Return to Vendor List", and "Close".

7. The information entered in the Set Properties window appears on the Vendor Cycle Information tab.
8. If you did not specify an **Order claim period** and an **Order cancel period** in the Set Properties window, type the numbers at this point.
9. Click **Add Vendor Cycle** to save the new cycle.
10. Make any necessary changes to the **Discount Table** and the **Deposit Account** tabs.
11. Click **Modify Vendor Cycle** to complete the process.
12. Click **Close** to exit.




Delete Vendor

The Delete Vendor wizard lets you perform the following tasks:

- Remove a single vendor cycle from an existing vendor record.
- Remove a vendor record and all vendor cycles.

To remove a vendor record

1. On the Vendor Information and Maintenance toolbar, click the **Delete Vendor** wizard .
2. If the Set Properties window appears, verify the defaults and click **OK**.
3. Search for a vendor. You can select vendors by library. You can locate specific vendors by customer number, vendor ID, or vendor name.

-Or-

Select the Vendor ID **Index** and leave the **Search for** box empty to retrieve a list of all vendors for that library.

4. Click **Search**. If more than one record matches your search, select the one you want and click **Remove Vendor/Cycles**. The following window appears:

Delete Vendor : Removing Information for Vendor EBSCO; ALL; ARROWOOD

Search for: Search

Index: Vendor ID

Library: ARROWOOD

Current: [EBSCO --- ARROWOOD](#)

Type: Search Browse Exact

Vendor Information | Vendor Extended Information | Vendor Cycle Information

Remove Vendor and All Cycles Remove Selected Cycles

Fiscal Cycle »	Ordered	Invoiced	Encumbered	Paid	Remove
2005	0	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>
2006	0	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>

Remove Vendor/Cycles | Remove Another Vendor | Return to Vendor List | Close


5. Click **Remove Vendor and All Cycles**,
- Or-**
- Click **Remove Selected Cycles** and then click **Remove** next to the individual cycle(s) you want to remove.
6. Click **Remove Vendor/Cycles**.
 7. Click **Yes** to confirm.
 8. Click **OK** to continue.
 9. Click **Close** to exit the Delete Vendor wizard.
- Or-**
- Click **Remove Another Vendor** to continue working.



Review All Vendors

The Review All Vendors wizard guides you through the process of reviewing the amounts, averages, and quantities information for all vendors within a specific fiscal cycle.

To review information about existing vendors

1. On the Vendor Information and Maintenance toolbar, click the **Review All Vendors** wizard .
2. If the Set Properties window appears, verify the defaults and click **OK**.
3. Search for a vendor. You can select vendors by fiscal cycle and library. You can locate specific vendors by customer number, vendor ID, or vendor name.

-Or-

Select the Vendor ID **Index** and leave the **Search for** box empty to retrieve a list of all vendors for that fiscal cycle and library.

4. Click **Search**. The following window appears:

Review All Vendors : Review All Vendors For 2005

Search for: Search

Index: Vendor ID

Fiscal cycle: 2005

Library: ARROWOOD

Type:

Search

Browse

Exact

Amounts Averages Quantities

Vendor ID	Vendor N...	Ordered	Encumbe...	Invoiced	Paid
Total		\$1305.21	\$1167.21	\$77.00	\$25.00
BT	Baker & Ta...	\$70.99	\$55.99	\$0.00	\$15.00
BLACKWELL	Blackwell	\$9.00	\$9.00	\$0.00	\$0.00
UKBOOK	British Print...	\$0.00	\$0.00	\$0.00	\$0.00
CANBOOK	Canadian P...	\$0.00	\$0.00	\$0.00	\$0.00

Review Selected Vendors Return to Vendor List New Search (b) Close

Vendor information for the selected fiscal cycle appears in tables on the folder tabs. You can sort the information in these tables by clicking the column headers. You also can change the order of the fields by clicking a column header and dragging it to a new position. Totals and averages appear in the first row of the respective tables.

Note If the **When Searching Vendors, Go Directly From Vendor Lookup to Review All** check box was cleared in the properties, individual vendor names appear with check boxes next to these names. Select the check boxes for the vendors you want to review, and click **Review Selected Vendors**. The Amounts, Averages, and Quantities tabs appear for the selected vendors.




Display Vendor (All Cycles)

Use the Display Vendor (All Cycles) wizard to perform the following tasks:

- Display a summary of a single vendor record.
- Summarize and total all cycles of a single vendor.
- Display a brief summary of multiple vendor records.

To display a vendor for all cycles

1. On the Vendor Information and Maintenance toolbar, click the **Display Vendor (All Cycles)** wizard .
2. If the Set Properties window appears, verify the defaults and click **OK**.
3. Search for a vendor. You can select vendors by library. You can locate specific vendors by customer number, vendor ID, or vendor name.

-Or-

Select the Vendor ID **Index** and leave the **Search for** box empty to retrieve a list of all vendors for that library.

4. Click **Search**. If more than one record matches your search, select the one you want and click **Display This Vendor**. The following window appears:

Display Vendor (All Cycles) : Displaying Information for EBSCO; ARROWOOD

Search for:

Index:

Library:

Current: [EBSCO --- ALL --- ARROWOOD](#)

Type: Search
 Browse
 Exact

Vendor Cycle Information	Invoices	Amounts	Averages	Counts
Vendor Information		Vendor Extended Info		
Library: ARROWOOD..				
Name: Ebsco				
Id: EBSCO		Customer number: 154-837-9912		
Ordering allowed: Y		Paying allowed: Y		
Amount invoiced/not funded: \$0.00		Quantity invoiced/not funded: 0		
Currency: US..		Number of cycles: 2		
Group 1: JOBBER..		Group 2: PERIODICAL..		
Group 3: INVOICE..				



Display Vendor (Specific Cycle)

The Display Vendor (Specific Cycle) wizard displays all orders and linked serials control records for a specified vendor in the specified fiscal cycle.

To display a vendor for a specific cycle

1. On the Vendor Information and Maintenance toolbar, click the **Display Vendor (Specific Cycle)** wizard



2. If the Set Properties window appears, verify the defaults and click **OK**.
3. Search for a vendor. You can select vendors by fiscal cycle and library. You can locate specific vendors by customer number, vendor ID, or vendor name.

-Or-

Select the Vendor ID **Index** and leave the **Search for** box empty to retrieve a list of all vendors for that fiscal cycle and library.

4. Click **Search**. If more than one record matches your search, select the one you want and click **Display This Vendor**. The following window appears:

Display Vendor (Specific Cycle) : Displaying Information for EBSCO; 2005; ARROWOOD - □ ×

Search for:

Index:

Fiscal cycle:

Library:

Current: [EBSCO --- 2005 --- ARROWOOD](#)

Type: Search
 Browse
 Exact

Vendor Cycle Information	Discount Table	Orders	Serial Control Links
Vendor Information	Vendor Extended Info	Addresses	EDI Address
Library: ARROWOOD..			
Name: Ebsco			
Id:	EBSCO	Customer number:	154-837-9912
Ordering allowed:	Y	Paying allowed:	Y
Amount invoiced/not funded:	\$0.00	Quantity invoiced/not funded:	0
Currency:	US..	Number of cycles:	2
Group 1:	JOBBER..	Group 2:	PERIODICAL..
Group 3:	INVOICE..		

Title Records

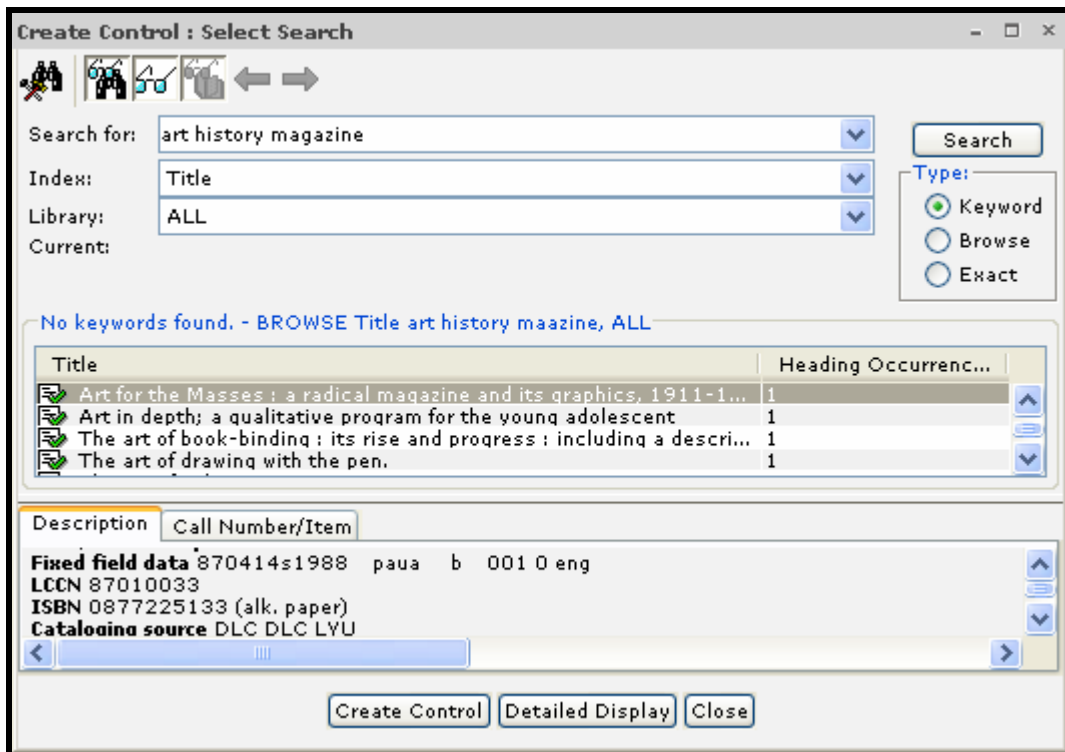


Item Search and Display

The search function is a common starting point for all of the serials control wizards. Understanding effective search techniques is helpful when conducting serial-related work. It displays information at the title, call number, and copy level. At the copy level, other information related to the item's circulation, bookings, holds, orders, and serial control is available.

To search for a title

1. On the Common Tasks toolbar, click the **Item Search and Display** wizard .
2. Search for the title you want to display.



Create Control : Select Search

Search for: art history magazine

Index: Title

Library: ALL

Current:

Type:
 Keyword
 Browse
 Exact

No keywords found. - BROWSE Title art history maazine, ALL

Title	Heading Occurrenc...
Art for the Masses : a radical magazine and its graphics, 1911-1...	1
Art in depth; a qualitative program for the young adolescent	1
The art of book-binding : its rise and progress : including a descri...	1
The art of drawing with the pen.	1

Description Call Number/Item

Fixed field data 870414s1988 paua b 001 0 eng

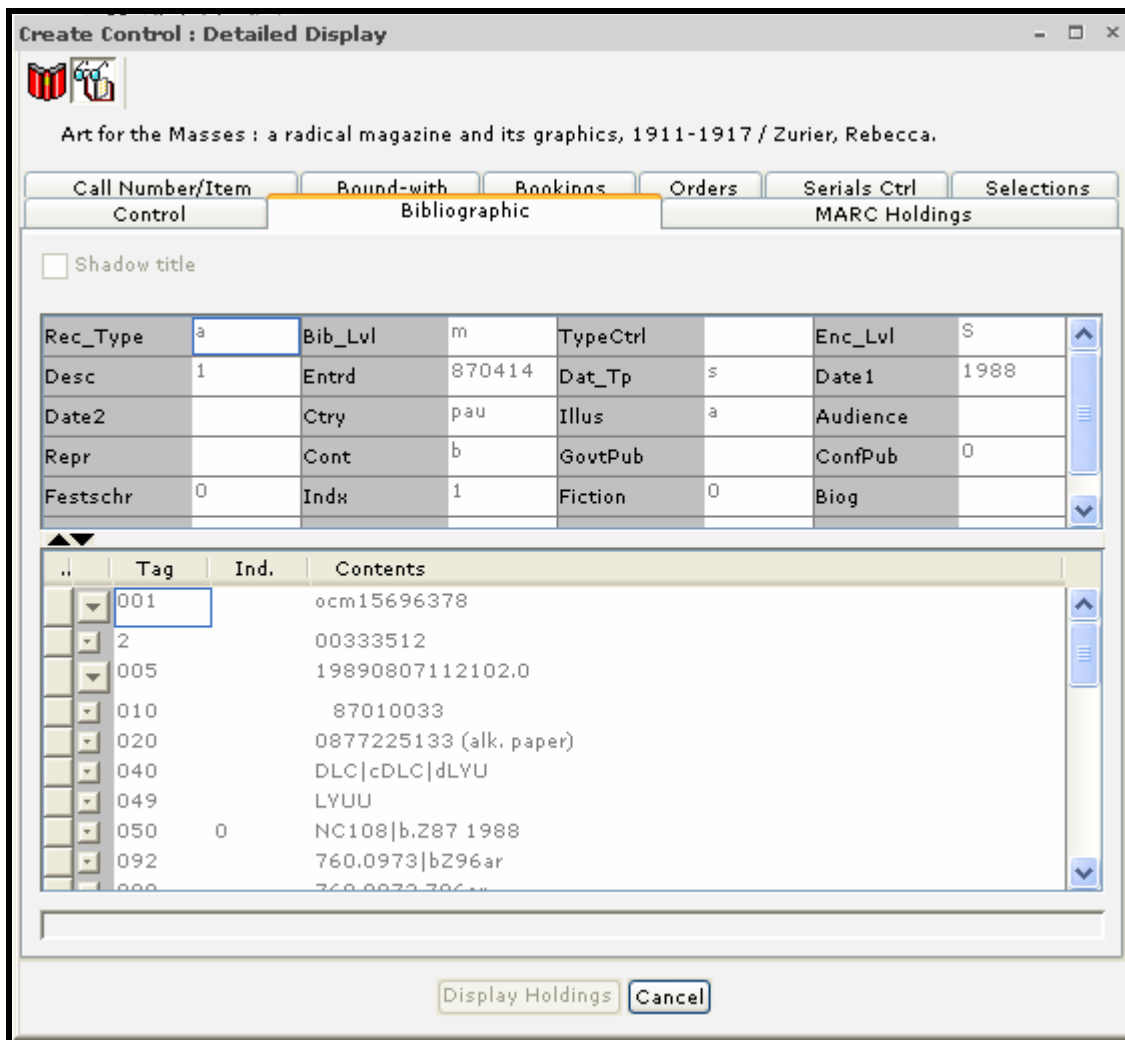
LCCN 87010033

ISBN 0877225133 (alk. paper)

Cataloging source DLC DLC LYU

Create Control Detailed Display Close

3. Click **Detailed Display** to display an individual volume/copy as needed. Information cannot be edited when using the Item Search and Display wizard, but helpers may be available while displaying an individual volume/copy to print labels.



4. Click **Search** to return to the search window to lookup another item.
-Or-
 Click **Close** to exit.



Add Title

The Add Title wizard guides you through the process of creating a new bibliographic record and associated call numbers and copies.


Unless there is a customized toolbar, you will need to access the Cataloging toolbar in order to add a title.

To change toolbars

1. Click the **Cataloging** tab.
2. The Cataloging toolbar appears.

To add a new title record

1. On the Title Maintenance toolbar, click the **Add Title**

wizard . The Set Properties window appears:

Add Title : Set Properties

Display property page: Wizard Startup Never

Defaults

Title default values

Format: SERIAL Entries template: TEMPLATE

Shadow title Entries:

Add item when creating title

Editor display options

MARC View Display fixed fields

Descriptive view Display descriptive labels (for entri...

Call number defaults

Library: ARROWOOD Shadow call number

Class scheme: LCPER Show shelving key

Item required default values

OK Cancel

Setting Defaults

The values set on this page control the defaults that appear while using this wizard. For complete information regarding the properties, refer to the online help. The following properties are especially important when creating Serial titles:

- **Format** – Relates to the catalog record format, not the physical format of the material being cataloged. The format selected, in combination with the Entries Template value discussed below, determines which fixed fields and catalog entries display on the Bibliographic tab. Select **SERIAL** to add bibliographic records for periodical titles.
 - **Entries template** – When combined with the Format value, this entry determines which fixed fields and catalog entries display on the Bibliographic tab. Select **TEMPLATE**. This will be covered in more detail in the Cataloging course.
 - **Add item when creating title** – Automatically adds an item record to the title as soon as you create it. If you clear (deselect) this check box, you can configure the serials control record (Distribution tab) to automatically create copy records at check-in.
 - Select a **Library** from the list. Serial control records (controls, vendors, claims) are assigned to a library.
 - Select a **Class scheme** from the list (for example, LCPER). This policy name identifies the call number's classification scheme. The class scheme automatically generates the correct shelving key based on the Class Scheme policy, which defines capitalization rules, sorting rules, and ascending or descending order.
2. Once you've set the defaults, click **OK**. The Add Title window appears:

Add Title

REQUIRED FIELD

Control Bibliographic MARC Holdings Call Number/Item

Shadow title

Rec_Type	a	Bib_Lvl	s	TypeCtrl		Enc_Lvl	
Desc		Entrd	050720	Dat_Tp	n	Date1	
Date2		Ctry		Frequ		Regulr	
ISDS		Ser_Type		Phys_Med		Repr	
Pub_Type		Cont		GovtPub		ConfPub	
Alphabt		SLI_Ent		Lang	eng	Mod_Rec	
Source	u						

Tag	Ind.	Contents
022		
110	1	
245		**REQUIRED FIELD**
246		
260		
300		
310		
362		
500		

Save Add Another Title Add Holdings Modify Holdings Add Call Number Add Item Delete Close

3. Replace the ****REQUIRED FIELD**** text with a new title.
4. If you configured the Add Title wizard to add a copy record when adding a new title record, type or scan an item ID in the Barcode field. For serials, you may not want to add a copy record at this point. You can set the options in the serial control record to add a copy when you receive the issues.
5. Click **Save** to save the record.

Add Title Examples

While in Cataloging, add a few more titles to use throughout the remainder of training for creating serial records and the checking in exercises. For each title:

- Select the **Serial** format when adding the serial title.
- Enter information in the **Frequen**, **ISSN**, and **Title** fields.
- Use your name for the corporate author.

Use the information provided to add the following titles.

1. Title: **O, The Oprah Magazine**
ISSN: **1531-3247**
Frequency: **Monthly (m)**
2. Title: **Archaeology**
ISSN: **0003-8113**
Frequency: **Bimonthly (b)**
3. Title: **Kirkus Reviews**
ISSN: **0042-6598**
Frequency: **Semi-monthly (s)**
4. Title: **Journal of the West**
ISSN: **0022-5169**
Frequency: **Quarterly (q)**
5. Title: **Farm Journal**
ISSN: **0014-8008**
Frequency: **Monthly (m)**
-

Serial Control Records

Overview


The Create Control wizard guides you through the process of adding a new control record and predicting issues. In this chapter, we perform number of exercises that focus on entering basic serial control records. Advanced functions such as OPAC display and pattern work will be covered in later chapters. The exercises in this section will emphasize the Basic, Pattern, Subscription, and Extended Info tabs of the serial control record.

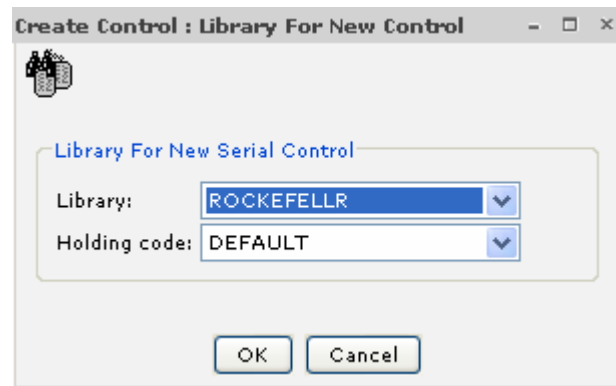


Create a Serial Control

Each serial title may have one or more linked serial control records.

To create a serial control record

1. On the Common Tasks toolbar, click the **Create Control** wizard .
2. If the Set Properties window appears, verify the default settings and click **OK**.
3. Search for the title for which you want to create a control record.
4. Verify that this is the correct title, and click **Create Control** to create a new serial control record. If you are creating records for a multi-library system, the Library For New Control window appears:

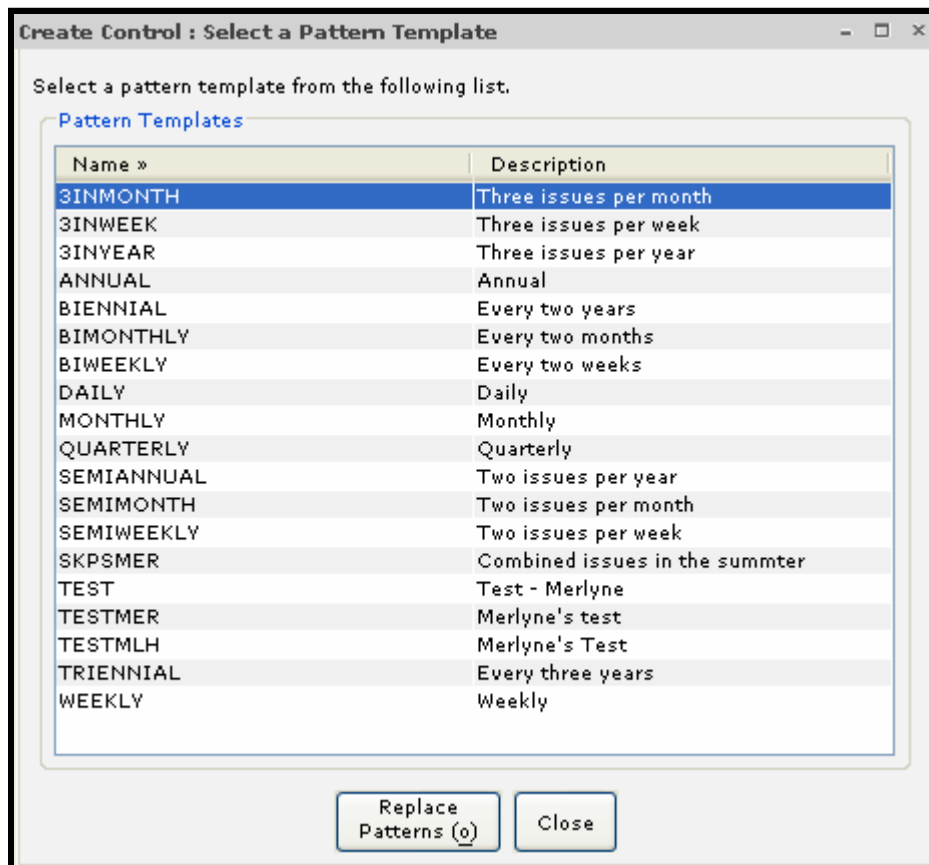


Note If more than one control record is associated with a title, the List of Controls Found on Lookup window displays. You may select one to display or duplicate, create a new control or look up another title.

5. In the **Library** box, select a library that will receive the issues.
6. In the **Holding Code** box, select an appropriate code established by your library. The holding code selected

must distribute copies to the library that is selected. It also helps with item creation and OPAC display. We will discuss this in more detail later.

7. Click **OK**. The Select a Pattern Template window may appear:



8. Click the publication frequency template for this title from the **Name** column and click **OK**. The Creating a Control ID window appears.

Note When you added the title record, if there was a code in the **Frequen** fixed field, the Select a Pattern Template window will not appear. Instead, SirsiDynix Symphony 3.2 reads this code and assigns the appropriate template for you to use when creating the serial control record.

We will discuss all the fields on four tabs: Basic, Subscription, Patterns, and Extended Info and continue with the Create a Serial Control procedures on page 54.

Basic Tab

The **New Control ID** box contains a unique serial control ID. The control ID may be an abbreviation of the serial title or its base call number, but each control ID should follow the same pattern (ISSN, base call number, title algorithm) with a prefix or suffix identifying the owning library. The control ID may also be system generated.

The **SISAC ID** field contains the title's ISSN in the form of 9999-1111. The ISSN comes from the MARC record (022 field). Refer to the following example.



The **Vendor Title #** box contains an ID number assigned to the serial title by the subscription vendor. Typically, this title number will appear on your vendor's invoice. This number prints on Serial Claim Notices.

The call number in serial control may be referred to as the **Base Call Number**. The base call number is the call number of the item with which the serial control record is associated.

The **Class Scheme** box identifies the call number's classification scheme. It is suggested that you use **LCPER**. This affects how the serial issue records will display in the OPAC. By using **LC**, the first issue checked in will appear at the top of the list. By using **LCPER**, the first issue checked in will appear at the bottom of the list. Therefore, the most recent issue checked in will appear at the top of the list.

The **Subscription ID** box contains the vendor-assigned ID for your subscription. Typically, the subscription ID will appear on your subscription vendor's invoice. This number would be unique to your library. This is a searchable box, and it may also appear on the mailing label. This box prints on Serial Claim Notices.

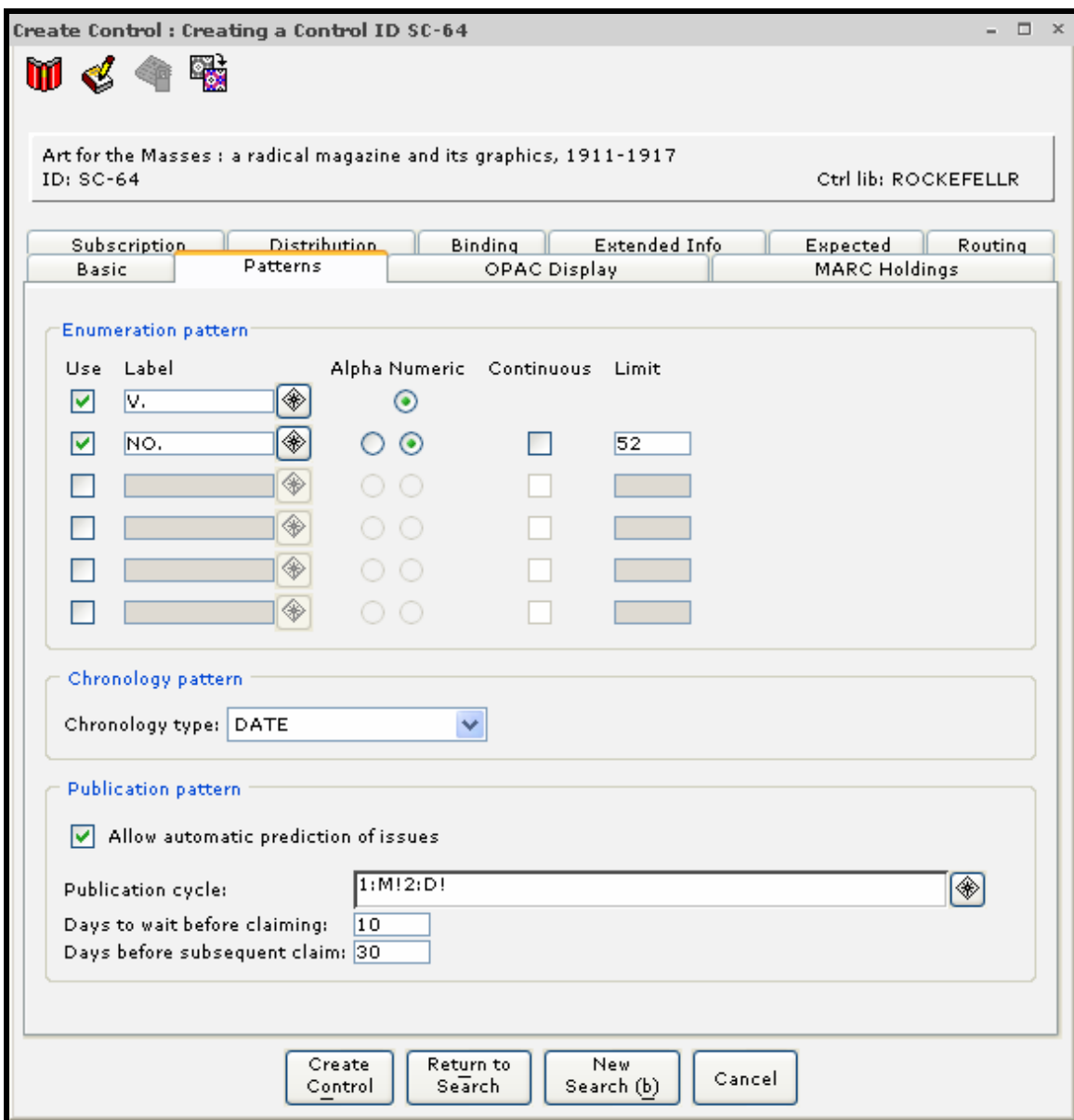
Your system administrator may define the options that appear in the **Status** box through the Serials policy configuration. The delivered options are **ACTIVE**, **CANCELLED**, **CEASED**, and **UNKNOWN**. These are "controlled vocabulary" boxes, so you must choose an option from the list. Using these status codes, you can run various reports.

Your system administrator may define the options that appear in the **Category1** and **Category2** boxes. Use these boxes for demographic reporting. These are "controlled vocabulary" boxes so you must choose an option from the list. These boxes are defined in the Serial policy configuration.

The system creates the **Date Created** on the date it creates the serials control record.

Patterns Tab

This tab helps you build prediction information about a subscription such as enumeration, chronology, and number of copies (physical pieces) expected. The pattern template that appears is based on the frequency code found in the **Frequen** fixed field in the MARC record. This helps you to expedite pattern creation. The information on this tab may not be perfect, but you can edit the copy records if there are irregularities.



Enumeration Pattern

The **Label** boxes provide abbreviations for the selected enumeration pattern.

Select the **Use** check box to include that subdivision in the enumeration calculation for issues.

Select either the **Alpha** or the **Numeric** option button to designate whether each enumeration level is an alphabetic or a numeric character pattern. Level one is always numeric. Subsequent enumeration levels can be either alphabetic or numeric. The first subdivision for a title is always **Continuous**, meaning the numbering scheme never resets.

Use the **Limit** box to determine the number of pieces per volume. This tells the volume to increment by one. It answers the question, “How many physical pieces do you expect to receive before the volume number changes?” (“After every 12, the volume number changes.”)

Chronology Pattern

When an issue has a chronological name in addition to an enumeration value, select an entry from the **Chronology type** list. This box provides a list of chronology types and tells SirsiDynix Symphony 3.2 how to format the date. If issues are commonly referenced by chronology rather than enumeration, the name (chronology type) may be most familiar to patrons. For a listing of delivered Chronology Type policies, see page 160.

If you select CUSTOM in the Chronology type list, the **Enter Custom List** box becomes available. You can then customize an existing pattern or create a completely irregular pattern.

Publication Pattern

This box displays publication cycle data in an abbreviated alphanumeric format for the selected title and control record. Click the **Publication Cycle** gadget to interpret, edit, or delete the data displayed in this box. Verify that the limits used in your enumeration pattern, the selected chronology type, and the chronology specified correspond to the publication cycle. This ensures accurate predictions. Up to 1,000 characters may be entered in this box.

Select or clear the **Allow Automatic Prediction of Issues** box to indicate whether you want SirsiDynix Symphony 3.2 to generate prediction records during the check-in process. If you clear this box, SirsiDynix Symphony 3.2 will not prompt you to create prediction records. We will discuss this in more detail later.

The **Days to Wait Before Claiming** box (also called Days to Claim) contains the number of days SirsiDynix Symphony 3.2 waits before marking an unreceived issue for claiming. This number represents the number of days past the predicted issue receipts date. If your library does not use report-driven claiming, type **0** (zero) in this box.

Note If you receive a serial that is free, type zero in this box to prevent automatic claiming through reports.

The **Days Before Subsequent Claim** box (also called Days To Subsequent Claim) contains the number of days SirsiDynix Symphony 3.2 waits before issuing additional claims against missing issues.

Subscription Tab

The information in this tab creates a link to the vendor and automates the claiming process. Subscription information specifies information such as the expected number of copies and the serial expiration date. If your site uses the Acquisitions module, this will be taken care of automatically.

The screenshot shows a window titled "Create Control : Creating a Control ID SC-64". The main content area is divided into several tabs: "Basic", "Patterns", "OPAC Display", and "MARC Holdings". The "Basic" tab is selected, and within it, the "Subscription" sub-tab is active. The "Distribution" sub-tab is also visible. The "OPAC Display" sub-tab has "Binding" and "Extended Info" options. The "MARC Holdings" sub-tab has "Expected" and "Routing" options. The "Subscription" section contains the following fields:

- Copies/Issues:**
 - Copies to receive:
 - Number of issues:
 - Expiration date: (with a calendar icon)
- Link for ordering/claiming:**
 - Fiscal cycle: (with a dropdown arrow)
 - Library: (with a dropdown arrow)
 - Vendor ID: (with a calendar icon)
 - Order ID:
 - Line item #:
 -

At the bottom of the window, there are four buttons: "Create Control", "Return to Search", "New Search (b)", and "Cancel".

Copies/Issues

The **Copies to Receive** box contains the number of copies of each expected issue. The default is set to one copy and is governed by property default information.

The **Number of Issues** box contains the number of expected issues in one subscription. This value typically corresponds to the number of issues received during a publication cycle.

The **Expiration Date** box contains the date that the subscription ends. The default value is NEVER.

Link for Ordering/Claiming

The information in this section links to the vendor or purchase order. The vendor record contains the order and claim addresses. You must have entries in this section if you plan to use claiming.

The **Fiscal Cycle** box identifies a particular funding period. The fiscal cycle must be a valid cycle used by the vendor ID.

Click the **Vendor ID** gadget to display valid IDs assigned to master vendor records.

The **Order ID** box identifies a single order record. Order information displays in the serial control record; control information displays in an order record.

At the basic level, the **Library** box determines where an item is held and where the user is registered in a multi-library setting.

The **Line Item** box identifies which line item on the order is displayed.

The **Order History** platform allows you to view the order history tied to this serial control record, if any.

Extended Info Tab

Use these three informational boxes to provide additional information. They appear at the point of check-in under “Special Instructions.”

The screenshot shows a window titled "Create Control : Creating a Control ID SC-64". At the top, there are icons for a book, a pencil, a speech bubble, and a document. Below the icons, the text reads "Art for the Masses : a radical magazine and its graphics, 1911-1917" and "ID: SC-64" on the left, and "Ctrl lib: ROCKEFELLR" on the right. A tabbed interface is visible with tabs for "Basic", "Patterns", "OPAC Display", "MARC Holdings", "Subscription", "Distribution", "Binding", "Extended Info", "Expected", and "Routing". The "Extended Info" tab is selected and highlighted. Inside this tab, there are three icons (a book, a pencil, and a red X) and three input fields. The first field is labeled "PHYSFORM" with a dropdown arrow, the second is labeled "NOTE" with a dropdown arrow, and the third is labeled "NAME" with a dropdown arrow. At the bottom of the window, there are four buttons: "Create Control", "Return to Search", "New Search (b)", and "Cancel".

The **PHYSFORM** box describes the physical form, medium, or types of material pertaining to the serial control record.

The **NOTE** box contains a note to be added to the record information.

The **NAME** box contains the name or title appearing on issues associated with a serial control. This field may contain the name of unit as described in MARC 21 Holdings format 844\$a (cases, decisions, updates).

Create a Serial Control procedures

9. Once the information has been completed, click **Create Control**. The Get Expected Issue Info window appears:

The screenshot shows a software window titled "Create Control : Get Expected Issue Info". At the top, it displays "New South gardener" and "ID: NEWSOG" on the left, and "Ctrl lib: ARROWOOD" on the right. Below this is a section titled "Prediction Records". Inside this section, there is a "Preview" field containing the number "52", followed by the text "expected issues starting with:". Underneath, there are two input fields: "V." containing "1" and "NO." containing "1". Below these are three more input fields: "Chronology:", "Date first prediction:", and "Date expected:". Each of the last three fields has a date picker icon to its right. At the bottom of the window, there are five buttons: "Generate Predictions", "Save Prediction", "Redo Prediction", "Change Pattern", and "Close".

10. Type the number of expected issues to **Preview**.
11. Type the volume and number of next expected issue in the **V.** and **NO.** boxes.
12. Type the **Chronology**.
13. Type or use the date gadgets to enter a **Date First Prediction** and **Date Expected**.
14. Click **Generate Predictions**. The Prediction Records appear:

Create Control : Get Expected Issue Info

New South gardener
ID: NEWSOG Ctrl lib: ARROWOOD

Prediction Records

Preview 52 expected issues starting with:
V. 1
NO. 1

Chronology: AUG 21, 2006
Date first prediction: 8/21/06
Date expected: 8/21/06

Prediction Records

Enumeration >	Chronology	Date expected
V. 1 NO. 1	AUG 21, 2006	8/21/2006
V. 1 NO. 2	AUG 28, 2006	8/28/2006
V. 1 NO. 3	SEP 4, 2006	9/4/2006
V. 1 NO. 4	SEP 11, 2006	9/11/2006
V. 1 NO. 5	SEP 18, 2006	9/18/2006
V. 1 NO. 6	SEP 25, 2006	9/25/2006

Generate Predictions Save Prediction Redo Prediction Change Pattern Close

- If satisfactory, click **Save Prediction**. Click **OK** to confirm.
 - If not satisfactory, click **Redo Prediction**. Repeat steps 9-14.
15. Click **OK** to confirm that the record was created and return to the control record's Basic tab.
16. From here you can:
- Make any additional changes to the information and click **Modify Control**.
 - Click **Duplicate Control** to create another control record for the same bibliographic record.
 - Click **Return to Search** to go back to the previous search results.
 - Click **New Search** to perform another title search.
 - Click **Close** to exit the wizard.

Create Serial Control Examples

Following along with the trainer, use the information provided below to create serial control records.

1. Title: **O, The Oprah Magazine**

Enumeration: **V. 7 NO.4**

Chronology: **APR 2006**

Date first prediction: **4/1/2006**

Date expected: **3/20/2006**

2. Title: **Archaeology**

Enumeration: **V. 59 NO. 1**

Chronology: **JAN/FEB 2006**

Date first prediction: **1/1/2006**

Date expected: **12/28/2005**

3. Title: **Kirkus Reviews**

Enumeration: **V. 74 NO. 6**

Chronology: **MAR 15, 2006**

Date first prediction: **3/15/2006**

Date expected: **3/10/2006**

4. Title: **Journal of the West**

Enumeration: **V. 44 NO. 4**

Chronology: **FALL 2005**

Date first prediction: **10/1/2005**

Date expected: **9/15/2005**

5. Title: **Farm Journal**

Enumeration: **V. 130 NO. 5**

Chronology: **MAR 2006**

Date first prediction: **3/1/2006**

Date expected: **2/20/2006**

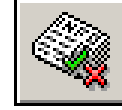
Check-in Serial Issues

Overview

The Check In wizard guides you through the process of checking in serial issues. If you use a SICI barcode to check-in an issue, see “Check-in Issues by Barcode” on page 74. Keep in mind that you may have multiple serial control records for different media types (print, microfiche, etc.).

In this chapter, we will work a number of exercises as listed below:

- Check-in predicted issues.
- Check-in a different number of copies than you expect.
- Check-in issues received out of order.
- Check-in issues without predictions.
- Check-in special issues such as supplements or indexes.
- Combine two or more issues.
- Check-in issues by scanning a barcode.



Check In


Check-in Examples

Following along with the trainer, use the titles previously entered as serial control records to check-in issues.

1. Title: **O, The Oprah Magazine**
2. Title: **Archaeology**
3. Title: **Kirkus Reviews**
4. Title: **Journal of the West**
5. Title: **Farm Journal**

Check-in Predicted Issues

To check-in serial issues

1. On the Common Tasks toolbar, click the **Check In** wizard .
2. If the Set Properties window appears, verify the default settings and click **OK**. The Serial Lookup window appears.
3. Search for the title you want to check-in.

Note If a title retrieved by the lookup does not have an associated serial control record, a message displays “This title is not under serials control.” You can enter a new lookup or create a serial control record for this title. If more than one serial control record is associated with a title, the List of Controls Found on Lookup window displays. Select one and click **Check In Issues** to display the next prediction record for that serial control record.

4. Click **Check In Issues**. The following window appears providing detailed information for the next predicted issue:

Check In : Check In Issues

Newsweek
ID: SC-95

Ctrl lib: ROCKEFELLR

Next Issue | Expected | Received | Claimed | Control | MARC Holdings | Distribution

Expected Issue

Enumeration: V. 1 NO. 1
Chronology: AUG 7, 2006
Base call number: SDFSADF
Copies expected: 1 Copies received: 1

Issues Checked In

Check In Now Different Copies Different Issue Selected Issue Return to Search (b) New Search (g) Close

The Expected Issue section displays enumeration, chronology, and base call number information pulled from the serial control record.


The Issues Checked In section displays enumeration, chronology, and date expected information when checking in more than one issue at a time.

5. Assuming that the information is correct, click **Check In Now**.
 - If the issue has routings, the routing lists will display. For more information, see the “Routing” section on page 135.
 - If items are being created by the check-in, a confirmation window appears with automatically generated item IDs next to the copies created. If properties are not set to automatically create copies, a text area displays where you can scan or type library-assigned barcodes.

When the issue is received and any items have been created, a window appears summarizing basic issue information.


Holding code »	Copies received	Routing lists
DEFAULT	1	0

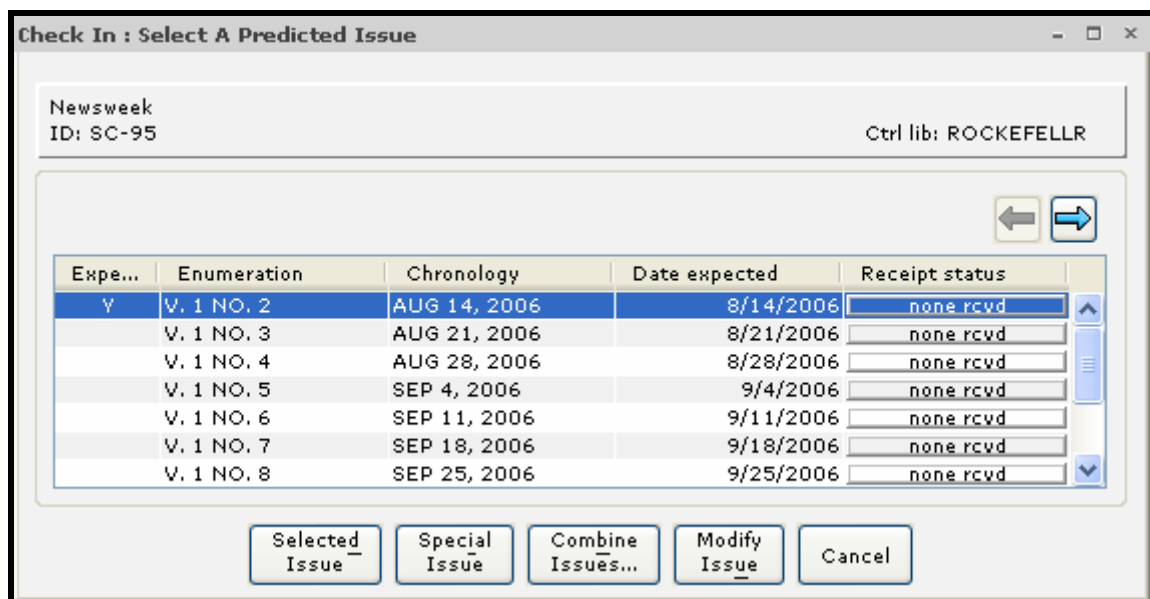
6. From here you can:
- Click **Next Issue** to check-in the next issue if you are checking in more than one consecutive issue of a serial.
 - If all current issues have been received for this serial control record, you may be prompted to generate additional predictions, or check-in the issue without a prediction.
 - Click **New Search** to perform the check-in process for another serial.
 - Click **Close** to exit.

Note Receiving a claimed issue transfers it to the Received tab. View claiming information using the **Show Issue Detail**  helper.

That was the basic check-in process. Refer to the following exercises for exceptions that can occur during the check-in process.

Check-in an Issue Out of Order

1. On the Common Tasks toolbar, click the **Check In** wizard  wizard.
2. If the Set Properties window appears, verify the default settings and click **OK**. The Serial Lookup window appears.
3. Search for the title you want to check-in.
4. On the Next Issue tab, click **Different Issue**. The Select a Predicted Issue window appears.



5. Highlight the issue received and click **Selected Issue**. The Receive a Predicted Issue window appears:

Check In : Receive A Predicted Issue

Newsweek
ID: SC-95

Ctrl lib: ROCKEFELLR

Receiving A Predicted Issue

Enumeration: V. 1 NO. 3
Chronology: AUG 21, 2006
Number expected: 1
Number received: 1
Receipt comment: Received before July 14 issue.

Check In (o) Cancel

6. Type the number of copies received.
7. Type a **Receipt comment** if needed.
8. Click **Check In**. The Issue Received window appears.
9. From here you can:
 - Click **Next Issue** to check-in another issue of the same serial.
 - Click **New Search** to perform the check-in process for another serial.
 - Click **Close** to exit.

Check-in an Issue without Prediction


There are two main ways to check-in an issue without prediction: According to Pattern and Special.

According to Pattern

Use the According to Pattern option if no more prediction records are available in the Expected tab, and new predictions cannot be generated as part of the check-in process, or you receive an unexpected replacement for an old issue.

When you select According to Pattern, fields defined in the serial control record's enumeration and chronology patterns are available to be completed. The According to Pattern option is best used when entering the next expected issues or for missing, fill-in, or claimed issues. Any values may be entered as long as they conform to the same prediction pattern.

Enumeration pattern values defined for this control, such as V. [volume] and NO. [number] must be entered for the issue to be properly received.

1. On the Common Tasks toolbar, click the **Check In** wizard  wizard
2. If the Set Properties window appears, verify the default settings and click **OK**. The Serial Lookup window appears.
3. Search for the title you want to check-in.
4. On the Next Issue tab, click **Different Issue**. The Select a Predicted Issue window appears.
5. Click **Special Issue**. The Receive without Prediction window appears.
6. Verify that **According to Pattern** is selected.
7. Type the volume and number in the **V.** and **NO.** boxes.
8. Type the **Chronology**.
9. Type the number of copies expected and received.
10. Type a **Receipt comment** if needed.

Time
ID: TIME Ctrl lib: ARROWOOD

Prediction Information

According To Pattern Special

Type of special issue:

Basic Supplement Index

V.

NO.

Enumeration:

Chronology:

Number expected: Number received:

Receipt comment:

Issues Checked In

11. Click **Check In**. The Issue Received window appears.

12. From here you can:


- Click **Next Issue** to check-in another issue of the same serial.
- Click **New Search** to perform the check-in process for another serial.
- Click **Close** to exit.

Special

Use the Special option if none of the prediction records displayed from the Different Issues button match the enumeration and chronology printed on the issue, or you receive a supplement or index.


When you select Special, fields are not associated with the serial control record's regular patterns. Although enumeration and chronology must be supplied, any value is accepted. The Special option is best used when entering supplemental issues, extra issues, or indexes.

Basic

1. On the Common Tasks toolbar, click the **Check In** wizard  wizard.
2. If the Set Properties window appears, verify the default settings and click **OK**. The Serial Lookup window appears.
3. Search for the title you want to check-in.
4. On the Next Issue tab, click **Different Issue**. The Select a Predicted Issue window appears.
5. Click **Special Issue**.
6. Select the **Special** option.
7. Select the **Basic** option.
8. Type an **Enumeration** and **Chronology**.
9. Type the number of copies expected and received.
10. Type a **Receipt comment** if needed.

11. Click **Check In**. The Issue Received window appears.
12. From here you can:
 - Click **Next Issue** to check-in another issue of the same serial.
 - Click **New Search** to perform the check-in process for another serial.
 - Click **Close** to exit.

Supplement

1. On the Common Tasks toolbar, click the **Check In** wizard  wizard.
2. If the Set Properties window appears, verify the default settings and click **OK**. The Serial Lookup window appears.
3. Search for the title you want to check-in.
4. On the Next Issue tab, click **Different Issue**. The Select a Predicted Issue window appears.
5. Click **Special Issue**.

6. Select the **Special** option.
7. Select the **Supplement** option.
8. Type an **Enumeration** and **Chronology**.
9. Type the number of copies expected and received.
10. Type a **Receipt comment** if needed.

Check In : Receive Without Prediction

Time
ID: TIME Ctrl lib: ARROWOOD

Prediction Information

According To Pattern Special

Type of special issue:

Basic Supplement Index

V.

NO.

Enumeration:

Chronology:

Number expected: Number received:


Receipt comment:

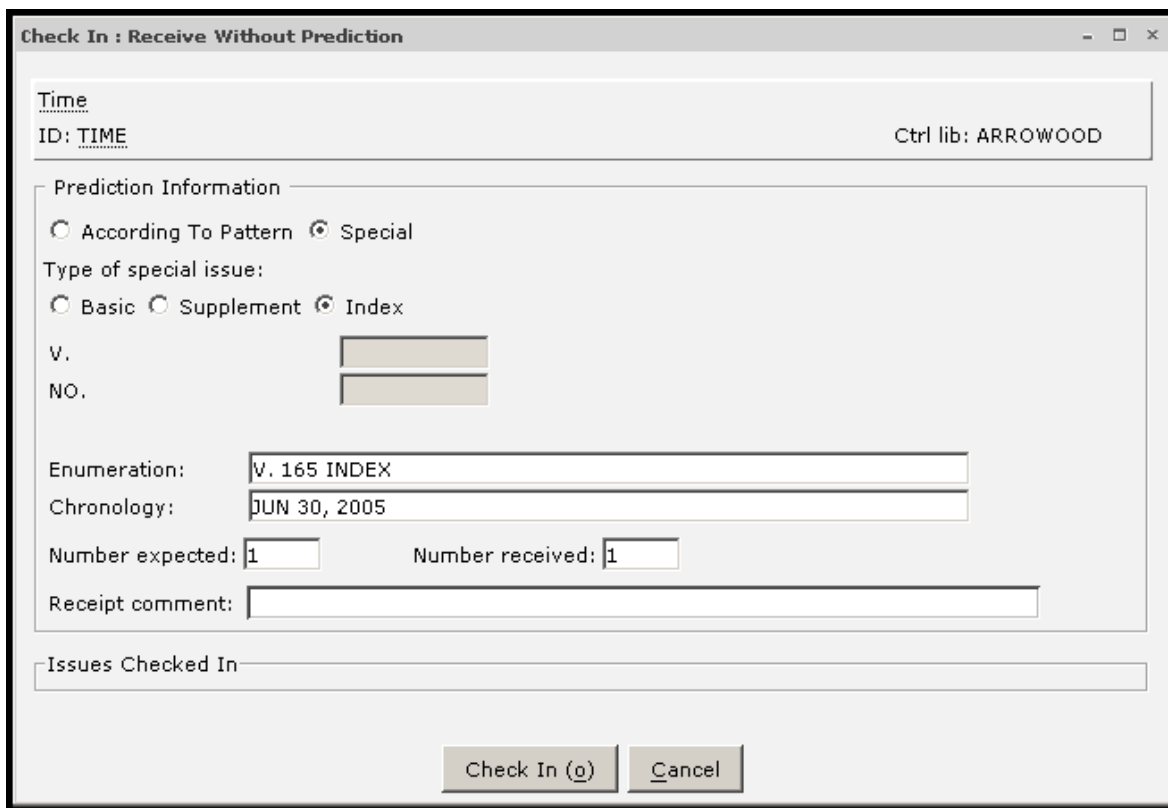
Issues Checked In

Check In (a) Cancel

11. Click **Check In**. The Issue Received window appears.
12. From here you can:
 - Click **Next Issue** to check-in another issue of the same serial.
 - Click **New Search** to perform the check-in process for another serial.
 - Click **Close** to exit.

Index

1. On the Common Tasks toolbar, click the **Check In** wizard .
2. If the Set Properties window appears, verify the default settings and click **OK**. The Serial Lookup window appears.
3. Search for the title you want to check-in.
4. On the Next Issue tab, click **Different Issue**. The Select a Predicted Issue window appears.
5. Click **Special Issue**.
6. Select the **Special** option.
7. Select the **Index** option.
8. Type an **Enumeration** and **Chronology**.
9. Type the number of copies expected and received.
10. Type a **Receipt comment** if needed.



Check In : Receive Without Prediction

Time
ID: TIME Ctrl lib: ARROWOOD

Prediction Information

According To Pattern Special

Type of special issue:

Basic Supplement Index

V.

NO.

Enumeration:

Chronology:

Number expected: Number received:

Receipt comment:

Issues Checked In

Check In (O) Cancel

11. Click **Check In**. The Issue Received window appears.

12. From here you can:

- Click **Next Issue** to check-in another issue of the same serial.
- Click **New Search** to perform the check-in process for another serial.
- Click **Close** to exit.

Note If the serials control record is set up to update MARC holdings, and you receive a special issue, different entries of the MARC Holdings record will be updated:


Special Issue/Basic – goes to field 866

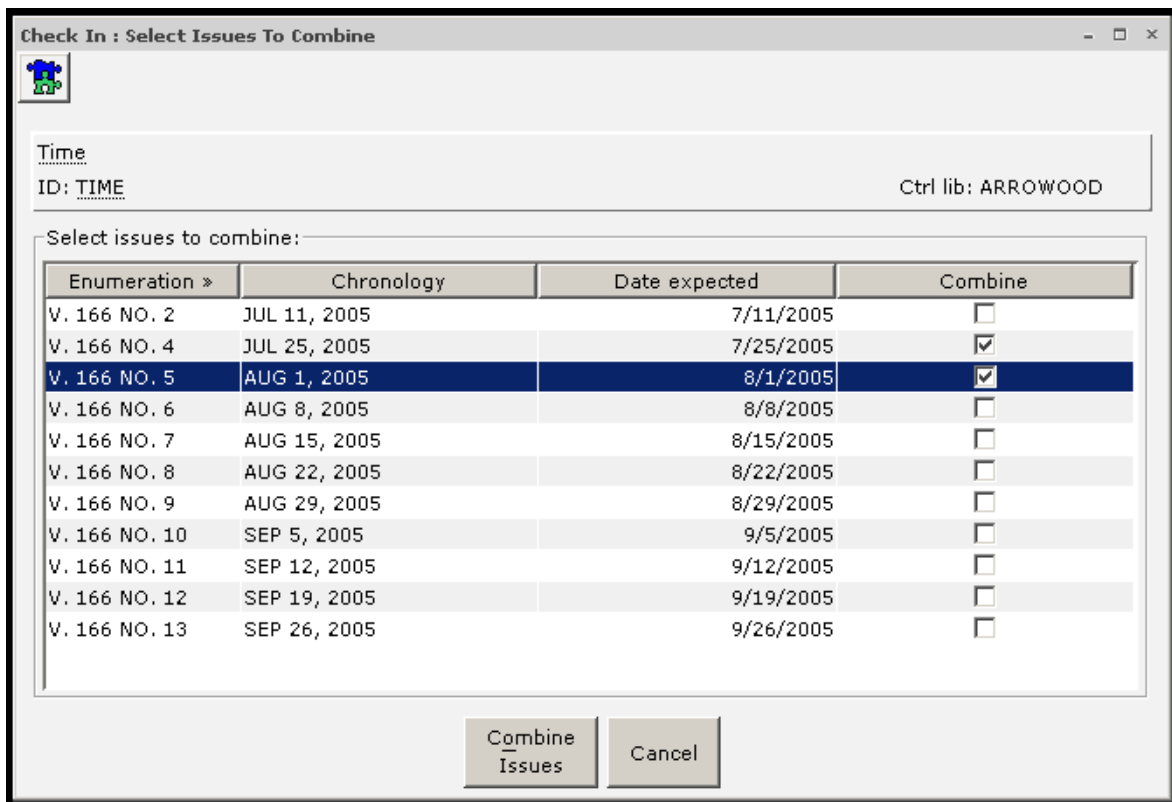
Special Issue/Supplement – goes to field 867

Special Issue/Index – goes to field 868

Check-in a Combined Issue

You can check-in an issue that combines two or more issues in a single issue.

1. On the Common Tasks toolbar, click the **Check In** wizard  wizard.
2. If the Set Properties window appears, verify the default settings and click **OK**. The Serial Lookup window appears.
3. Search for the title you want to check-in.
4. On the Next Issue tab, click **Different Issue**. The Select a Predicted Issue window appears.
5. Click **Combine Issues**. The Select Issues to Combine window appears:



6. Select the check boxes of the issues you want to combine and click **Combine Issues**. The Receive Combined Issue window appears:

Check In : Receive Combined Issue



Time
ID: TIME Ctrl lib: ARROWOOD

Receiving Combined Issue

Enumeration: V. 166 NO. 4/5
Chronology: AUG 1, 2005
Number expected: 1 Number received: 1
Receipt comment:


Check In (o) Cancel

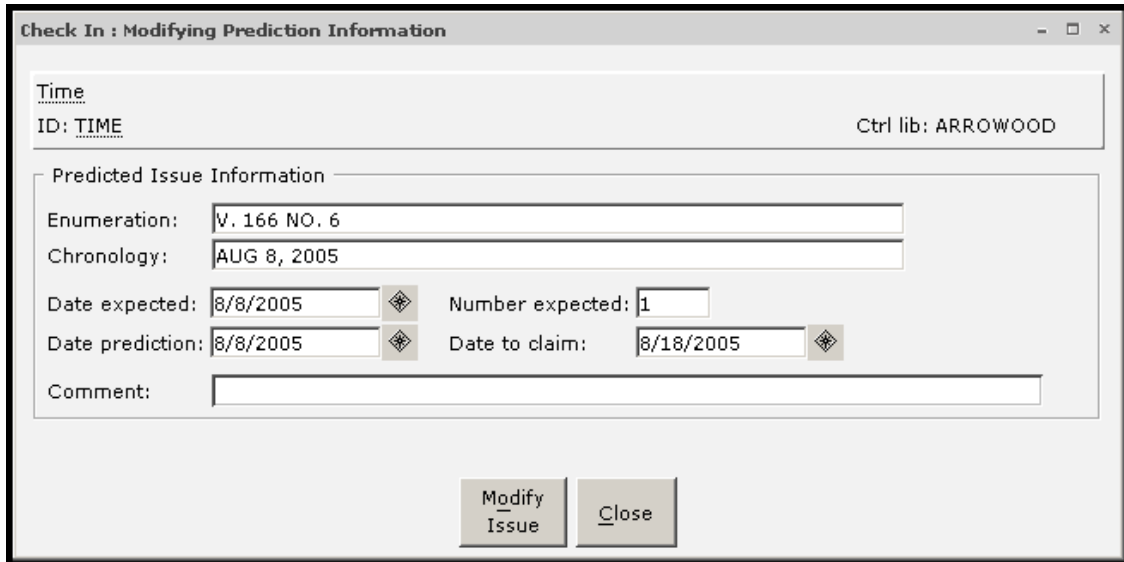
7. You can set the display pattern of the combined issues in the enumeration and chronology fields using one of these options:

- Right-click **Check In** . The Set Properties window appears. Click the **Defaults** tab. Scroll down to the Combine Issues Options and make your selections.
- Click the **Combine Issues Options**  helper on the Select Issues to Combine window and make your selections. If this helper does not appear, be sure it is enabled in the properties for the Check In wizard.
- Edit the fields manually on the Combined Issue window illustrated above.

8. Type the number of copies expected and received.
9. Type a **Receipt comment** if needed.
10. Click **Check In**. The Issue Received window appears.
11. From here you can:
 - Click **Next Issue** to check-in another issue of the same serial.
 - Click **New Search** to perform the check-in process for another serial.
 - Click **Close** to exit.

Check-in and Modify an Issue

1. On the Common Tasks toolbar, click the **Check In** wizard .
2. If the Set Properties window appears, verify the default settings and click **OK**. The Serial Lookup window appears.
3. Search for the title you want to check-in.
4. On the Next Issue tab, click **Different Issue**. The Select a Predicted Issue window appears.
5. Highlight the issue and click **Modify Issue**.
6. Make the appropriate changes to the information. If you type a **Comment** it will appear as Special Instructions.



Check In : Modifying Prediction Information

Time
ID: TIME Ctrl lib: ARROWOOD

Predicted Issue Information

Enumeration: V. 166 NO. 6
Chronology: AUG 8, 2005


Date expected: 8/8/2005 Number expected: 1
Date prediction: 8/8/2005 Date to claim: 8/18/2005

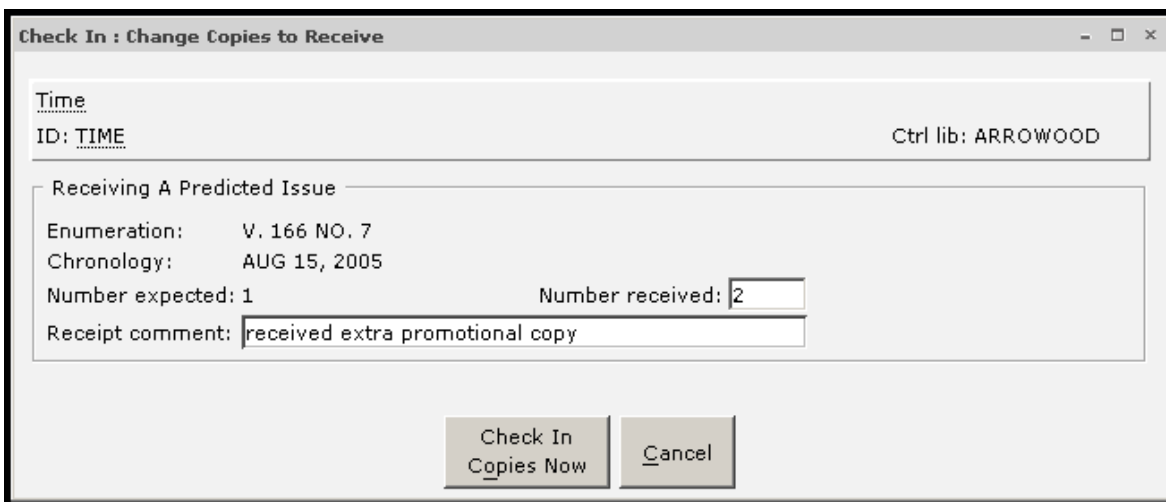
Comment:

7. Click **Modify Issue**. The Receive a Predicted Issue window appears.
8. Type the **Number received**.
9. Type the **Receipt comment** if needed.
10. Click **Check In**. The Issue Received window appears.
11. From here you can:
 - Click **Next Issue** to check-in another issue of the same serial.
 - Click **New Search** to perform the check-in process for another serial.
 - Click **Close** to exit.

Check-in Different Copies

You can receive a different number of copies than you expect.

1. On the Common Tasks toolbar, click the **Check In** wizard .
2. If the Set Properties window appears, verify the default settings and click **OK**. The Serial Lookup window appears.
3. Search for the title you want to check-in.
4. On the Next Issue tab, click **Different Copies**. The Change Copies to Receive window appears.



Check In : Change Copies to Receive

Time
ID: TIME Ctrl lib: ARROWOOD

Receiving A Predicted Issue

Enumeration: V. 166 NO. 7
Chronology: AUG 15, 2005
Number expected: 1 Number received: 2
Receipt comment: received extra promotional copy

5. Type the number of copies you received.
6. Type a **Receipt comment** if needed.
7. Click **Check In Copies Now**. The Issue Received window appears.
8. From here you can:
 - Click **Next Issue** to check-in another issue of the same serial.
 - Click **New Search** to perform the check-in process for another serial.
 - Click **Close** to exit.

Check-in Issues by Barcode

You can also check-in issues by entering or scanning the Bar SICI code.

1. On the Select Search window, select **Bar SICI** in the **Index** box. If you do not have a barcode scanner, but still want to enter the issue's barcode, use the **HR SICI** option.

Note If the issue has no SICI printed on it, you can type the ISSN in this box, if available. The ISSN must be entered in the format 9999-1111. The first matching SISAC ID box in a serial control record displays on the Receive Item window.

2. Scan the issue's barcode if you chose Bar SICI, or enter it into the box if you selected HR SICI and click **Search**.

Other Serials Wizards




Display Control

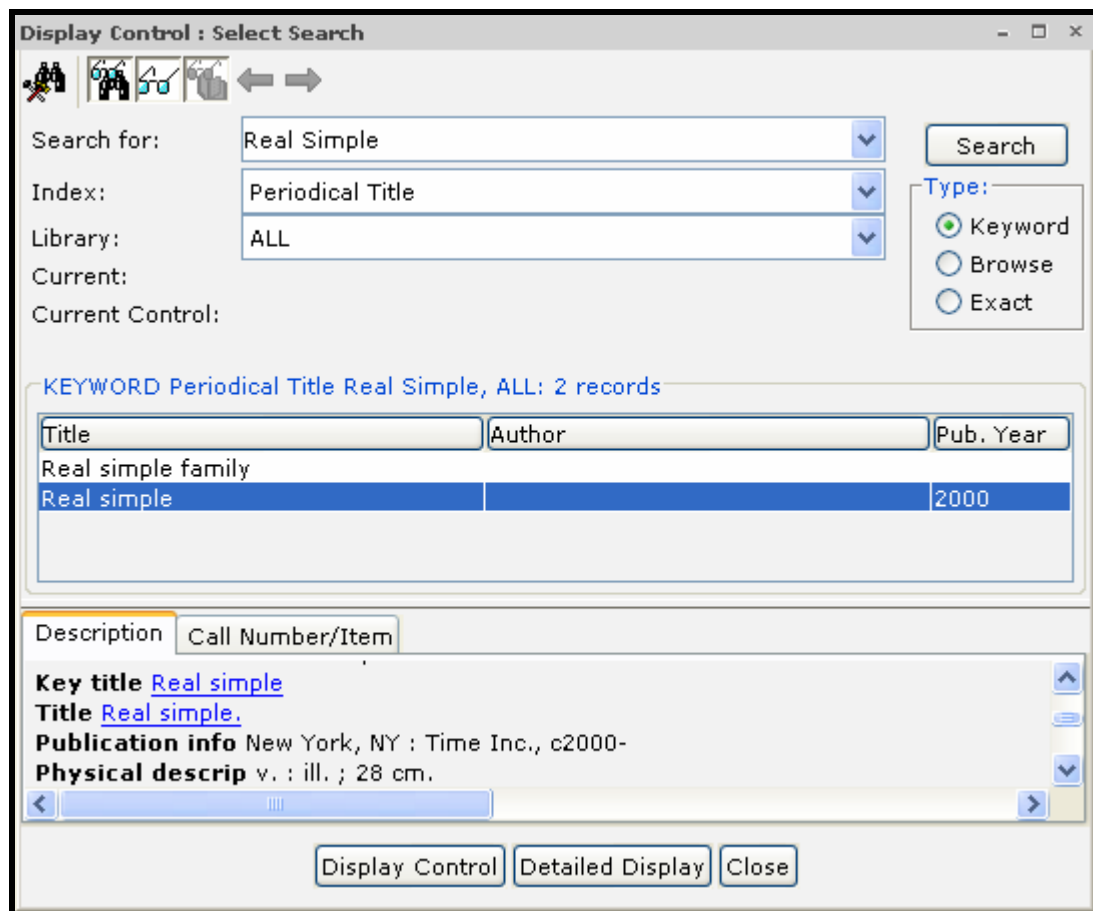
The Display Control wizard guides you through the process of displaying all parts of a serial control record. This wizard allows you to review general information about the control records as well as monitor detailed information about expected, received, and claimed issues. You cannot edit any information when using this wizard.

To display an existing serial control record

1. On the Common Tasks toolbar, click the **Display**

Control wizard 

2. If the Set Properties window appears, verify the default settings and click **OK**. The Select Search window appears.
3. Search for the title you want to display:



4. Select the record and click **Display Control**.
5. If more than one serial control record is associated with a title, a list appears on the List of Controls Found on Lookup window.
6. Select the control ID, and click **View Serial Info** to display the serial control record for the selected title.

Note If a title retrieved by the search does not have an associated serial control record, a message appears to inform you that there are no serial control records, and prompts you to enter a new lookup.

Display Control : Displaying REASI

Real simple
ID: REASI Ctrl lib: ARROWOOD

Extended Info	Expected	Received	Claimed	Routing	Order History	Siblings
Basic	Patterns	OPAC Display	MARC Holdings	Distribution	Binding	

Control ID: REASI Status: ACTIVE
SISAC ID: 1528-1701 Category1:
Vendor title#: Category2:
Base call number: 640 13
Class scheme: LCPER Date created: 8/21/2006
Subscription ID:


Return to Search New Search (b) Close



Modify Control

The Modify Control wizard guides you through the process of making changes to existing serial control records. This wizard allows you to modify general information in the control records as well as edit detailed information for expected, received, and claimed issues.

To change an existing serial control record


1. On the Common Tasks toolbar, click the **Modify Control** wizard .
2. If the Set Properties window appears, verify the default settings and click **OK**. The Select Search window appears.
3. Search for the title you want to modify.
4. If more than one serial control record is associated with a title, a list appears.
5. Select a title and click **Modify Control** to display the serial control record for the selected title.
6. Make any changes and click **Modify Control** when you are finished with the update.
7. Click **Close** to exit the wizard.



Remove Control

The Remove Control wizard guides you through the process of removing all parts of a serial control record. You cannot edit any information when using this wizard.

To remove an existing serial control record

1. On the Common Tasks toolbar, click the **Remove Control** wizard .
2. If the Set Properties window appears, verify the default settings and click **OK**. The Select Search window appears.
3. Search for the title you want to remove.
4. If more than one serial control record is associated with a title, a list appears.
5. Select a title and click **Remove Control** to display the serial control record for the selected title.
6. Verify that you have selected the correct serial control record, and click **Remove Control** to complete the process.
7. If any issues are in the Expected, Received, or Claimed tabs, or if the serial control record has routings attached, a message appears. You will then have the option to cancel the removal and review the folders, or remove the control.

Creating Predictions

Overview

If you are creating a serial control record in order to generate predictions (making it easier to check-in issues), you need to create pattern information. If you create a control on a MARC record with the appropriate value in the frequency fixed field, WorkFlows uses an associated pattern template to complete the fields in the Patterns tab.

In this chapter, you will learn to create predictions through discussions of the following topics.

- Pattern templates
- Date first prediction
- Pattern helpers
- Prediction helpers

Working with Patterns and Creating Predictions

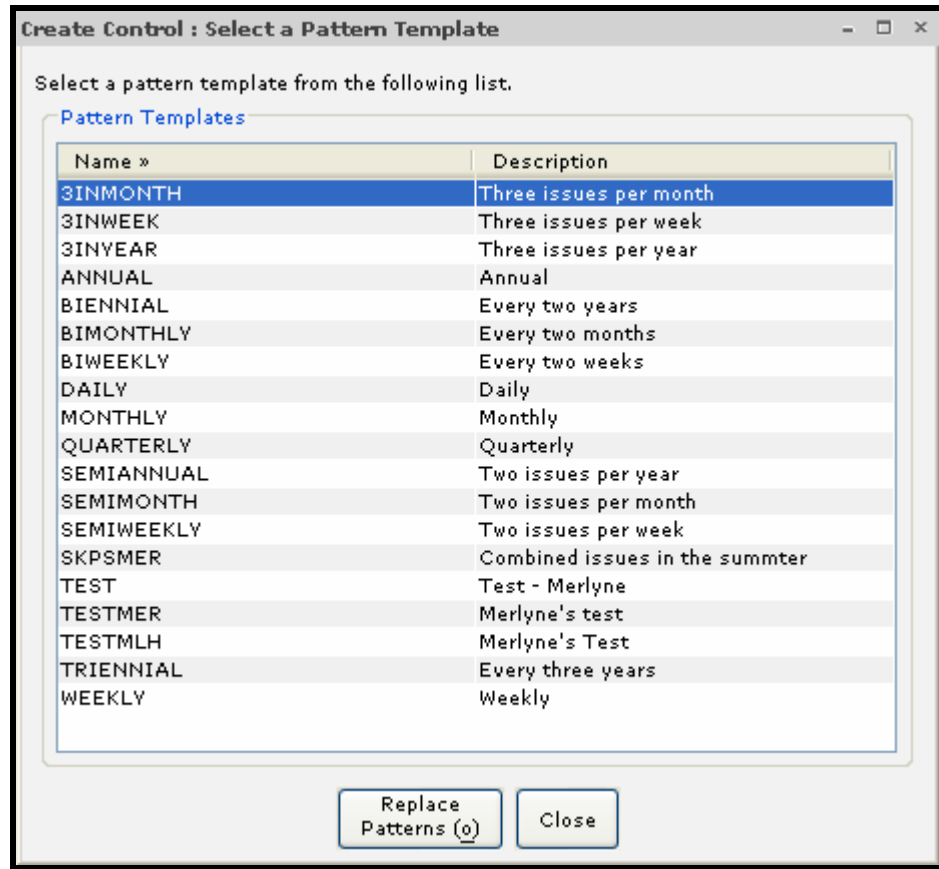
Pattern Templates

Pattern templates are delivered based on the codes for the frequency fixed field in the MARC record. These templates help expedite the process of filling in pattern information for the serial control record.

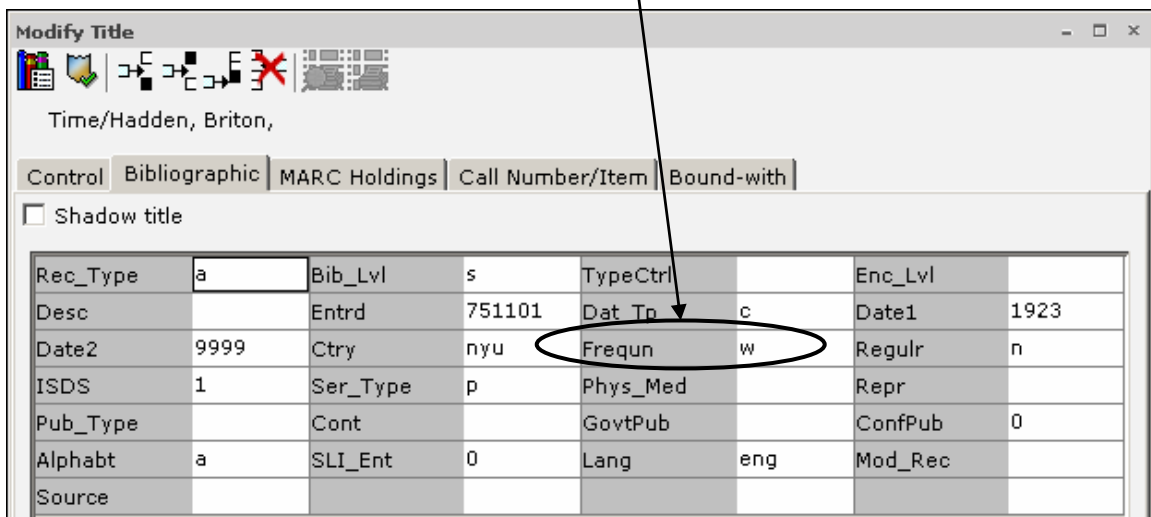
Control record patterns can be filled in automatically. During the initial process of creating a serial control record, the Create Control wizard examines the MARC record's frequency fixed field to determine which pattern template should be selected for the control record. When a match is made, the pattern is automatically inserted into the Patterns tab of the control record.

When a frequency fixed field cannot be found, no pattern is selected. A helper in the Patterns tab of the control record (Replace Patterns helper) can be used to drop a pattern template into the serial control record.

Here is a list of delivered pattern templates:



This example shows the serial record showing the frequency fixed field (Frequ).



Pattern Policies

Pattern templates are delivered with the software. They are controlled by pattern policies in the SirsiDynix Symphony 3.2 configuration. The structure of a pattern template policy includes enumeration, chronology, and a publication cycle. The template also includes a frequency code, which is based on the coding options available to the frequency fixed field of the serial MARC record. Here is an example of a pattern template policy:

Serial Pattern

Name: WEEKLY
 Description: Weekly
 Frequency code: WEEKLY

Use	Label	Alpha Numeric	Continuous	Limit
<input checked="" type="checkbox"/>	V.	<input type="radio"/>	<input checked="" type="radio"/>	
<input checked="" type="checkbox"/>	NO.	<input type="radio"/>	<input checked="" type="radio"/>	52
<input type="checkbox"/>		<input type="radio"/>	<input checked="" type="radio"/>	
<input type="checkbox"/>		<input type="radio"/>	<input checked="" type="radio"/>	
<input type="checkbox"/>		<input type="radio"/>	<input checked="" type="radio"/>	
<input type="checkbox"/>		<input type="radio"/>	<input checked="" type="radio"/>	

Chronology type: DATE
 Custom chronology:
 Publication cycle: 1:W12:D!
 Days to claim: 10
 Days to subsequent claim: 30
 Number of issues: 52

Save Cancel

Here is an example of a frequency code policy associated with the pattern template policy:

Frequency

Name: WEEKLY
 Description: Weekly
 Code: w

Save Cancel


Generating Predictions in Batch

One of the benefits of serial control is the ability to use the control record's pattern to generate predictions in batch. There are two ways to create batches of predictions: using the prompts that appear after adding a new serial control wizard or the Generate Predictions helper, which can be found in the Modify Control wizard.

Both of these methods utilize the information supplied in the Patterns tab of the serial control record. When generating predictions, you can use information about the first issue you have received to serve as a model for all predictions created.

Generate Predictions Helper

The Get Expected Issue Info window displays when you use the

Generate Predictions helper , letting you define prediction record information for a single issue. You can then use this record to generate prediction records for any number of additional issues.

Note The Get Expected Issue Info window also displays as issues are checked in if the Allow Automatic Prediction of Issues box is enabled under Patterns, and the Generate Predictions step is selected, or after a serial control pattern is first created. This helper is accessible from both the Create Control and Modify Control wizards.

Modify Control : Get Expected Issue Info

ID: Ctrl lib:


Prediction Records


Preview expected issues starting with:

V.

NO.

Chronology:

Date first prediction: 

Date expected: 

In the **Preview Expected Issues Starting With** box, type the number of prediction records you want to generate. Usually, the number entered here should generate prediction records for one complete publication cycle. For example, type **12** if you have a monthly publication renewed once per year, or type **13** if you have a monthly publication, but during one month it publishes twice.

The following fields display the enumeration pattern labels, such as V. or NO., as they are currently defined in the control record. The modifiable default values that display next to the labels are based on the next expected issue. Replace any default value(s) with the actual enumerations defining the first prediction record to be generated. In a regularly published serial, you may need to modify these values the first time predictions are generated.

The remaining fields are basic prediction record fields. Values must be entered into all of the following fields.

- Chronology
- Date first prediction
- Date expected

Click **Generate Predictions** to display a list of the issues you predicted based on the values you entered and the Patterns tab information. Check the list to ensure it states the prediction sequence you expect for this title, and save your prediction to create the list of predictions in the Expected tab.

Redo your prediction to redefine the first prediction record. Change the pattern to make changes to the Patterns tab and select the Generate Predictions helper again.

Understanding the Publication Cycle, Chronology, and Date First Prediction

The key to understanding batch prediction is the Date First Prediction. It calculates the date expected for each issue based on the publication cycle in the Patterns tab and the chronology of the issue used as the model. When the Date First Prediction is completed correctly according to the publication cycle and chronology information, the expected dates for all issues will be consistent.

- **Publication cycle (Patterns tab)**
The primary role of this field is to define the frequency (daily, weekly, monthly, etc). It is also lets the user select a date on which the material is published. For example, you would choose Thursday for a weekly publication with a chronology of July 13, 2006 since the date is on a Thursday. The date published is a little less clear in the case of a monthly. If the chronology for a monthly publication is July 2006, the date published defaults to the first day of the month.
- **Chronology (generating predictions)**
When creating a batch of predictions, the chronology of the first issue is specified in the Chronology box. The chronology is the date on the publication.
- **Date first prediction (generating predictions)**
When creating a batch of predictions, you need to fill out the Date First Prediction box for the first issue. WorkFlows uses this start date to calculate the date expected for each predicted issue.

Determining the date first prediction by asking two questions:

1. Where does the chronology of the issue fall on the calendar? When identifying the date first prediction, think about the chronology of the issue. For example, the chronology might be June 2006 for the first issue of a monthly. On the calendar, the chronology falls on the month of June in 2006.

That means the date first prediction must be in the month of June in the year 2006. This is half of what you need to know.

2. What was the date chosen in the publication cycle? For a monthly pattern, the default is the first of the month. You already know based on your first question that June 2006 will make up part of the date first prediction. If the first day of the month is in the publication cycle, the date first prediction will be 6/1/2006.

Why is it important to carefully select the date first prediction?

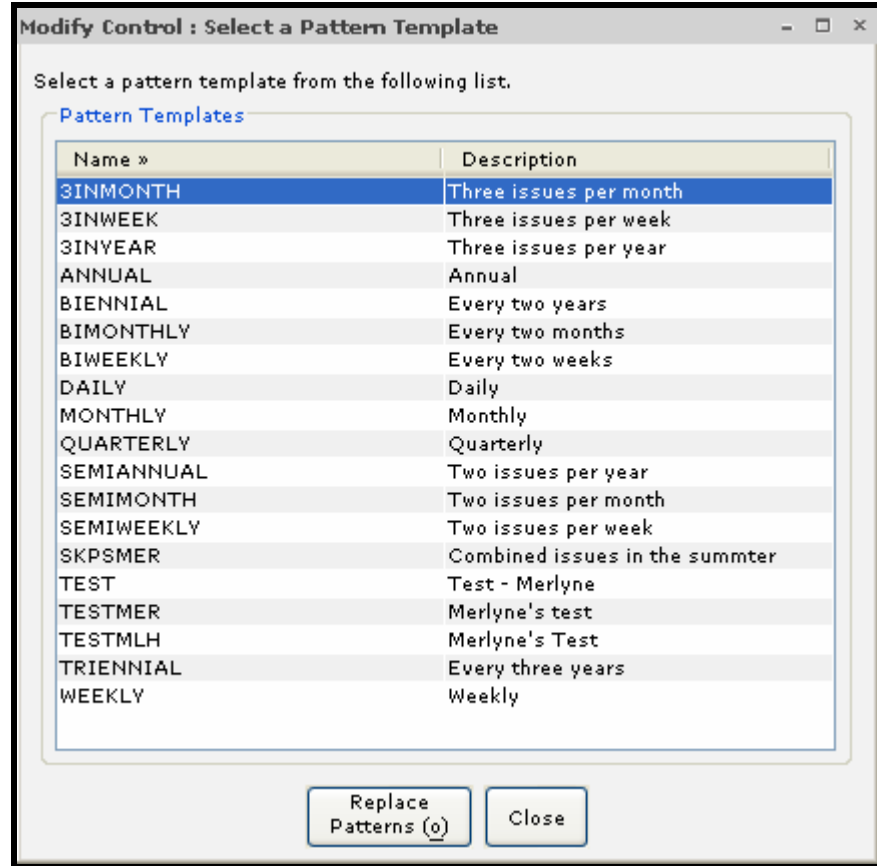
The date first prediction helps calculate the date expected for every predicted issue. The date expected is calculated by measuring the number of days between the date first prediction and date expected of the first prediction record.

If the Date First Prediction box is not filled in correctly (i.e., the date first prediction doesn't match the chronology and date published), the expected dates may not be calculated correctly.

Replace Patterns Helper

The Replace Patterns helper displays only when the Patterns tab is displayed in a wizard that can modify the information.

This timesaving helper provides default information for all necessary fields of the Pattern tab in one step, and maintains consistent entries in fields with variable values, such as the Days to Wait Before Claiming and Days Before Subsequent Claim fields.



This helper is particularly useful in the following situations.

- The bibliographic record is not in MARC record format.
- The frequency code in the bibliographic record of the serial title is missing or is incorrect.
- The serial control record is connected to a monograph.
- The periodical has an odd publication cycle, such as 13 times in a year.
- Select the desired pattern name from the list. The pattern names and pattern box information provided in this helper are related to the frequency code in the bibliographic record.
- Values in the Patterns tab are filled in or modified based on the template selected.


Note The default information is displayed in pattern templates. Template component values may be defined in either the Serial Patterns Configuration or the Serials Control Configuration policies.

Understanding the Publication Cycle Gadget

The Publication Cycle box in the Patterns tab displays existing publication cycle data for the selected title and control record in an abbreviated alphanumeric format. This gadget is used to display and define the publication cycle maintained in the title's serial control record. Initiating the Publication Cycle gadget and immediately selecting the **OK** button translates the existing alphanumeric coded format into human readable text.

Publication Cycle Omission

Some serials will have a publication break during an otherwise predictable publication cycle. This gadget allows publication breaks to be specified without affecting a title's overall prediction cycle.

When **Omit Issues by**  is selected from within a publication cycle gadget, publication breaks can be predicted using various omission options. The options that display depends on the publication cycle you selected.

Note Omissions are not available in the Weekly cycle until a day, week, or holiday is selected. Omissions are not available in the Annually cycle because all dates are considered omitted unless specified.

Select one of the types of omissions available, which may include day, week, date, month, or holiday.

As you select one of the omission options and make your omission selections, a list of your omissions appears. You may continue this process until you have selected as many different omission options as necessary. Review your list. If there are any unwanted omission lines, select the line and use the **Remove** button to remove selections.

Click **OK** to accept the omissions and return to the Publication Cycle gadget, or cancel your omission selections. Determine the type of omission you want to make according to the following guidelines.

Omit by Day

When the **Daily** button is selected for omission, a list of days of the week displays. Enabling one or more days of the week indicates that these days are exceptions to the standard publication cycle set up for this serial. Enable each day of the week that the periodical is not published.

Example

Omit by day in a publication statement structured in the following way: published daily except Sundays.

Omit by Week

When the **Weekly** button is selected for omission, the months are listed along with a list for six weeks. Enabling one or more weeks indicates that these weeks are exceptions to the standard publication cycle set up for this serial. You may select any week number in a month and up to six weeks for each month. WorkFlows does not check the weeks entered against a current calendar, or whether the weeks selected are compatible with the publication cycle you select.

Example

Omit by week in a publication statement structured in the following way: published daily except the third and fourth weeks of December.

Omit by Date

When the **Date** tab is selected for omission, the months are listed along with 31 days. Selecting one or more dates indicates exceptions to the standard publication cycle set up for this serial. For each month, you may select any day up to 31. WorkFlows does not check the days entered against a current calendar, or whether the days selected are compatible with the publication cycle you select. Date values should correspond exactly with a date statement in the issue.

In cases where it would not be effective to select individual dates, the Date omission may allow selection of month only.

Example

Omit by week in a publication statement structured in the following way: published daily except April 15.

Note If the dates on the issue correspond to holidays, particularly those that are not on the same date year after year, such as Easter, Memorial Day, or Thanksgiving, these should be omitted as holidays to avoid annual modifications to the publication cycle.

Omit by Month

When the **Monthly** button is selected for omission, a list of the months displays. Enabling one or more months indicates that these months are exceptions to the standard publication cycle set up for this serial. Enable each month that the periodical is not published.

Example

Omit by month in a publication statement structured in the following way: published monthly except December.

Note You cannot omit by month on a weekly publication cycle, but you can select to omit all weeks in a given month.

Omit by Holiday

When the **Holiday** tab is selected for omission, a list of holidays defined for your library displays. Selecting one or more of these holidays indicates exceptions to the standard publication cycle set up for this serial. WorkFlows does not check whether the holidays entered are compatible with the publication cycle you select. Enable each holiday that the periodical is not published.

A holiday is defined as a single day of the month or day of the week. If a journal is not published during the week of a holiday, or the holiday spans more than one day, the only predictions that will be skipped are those that fall precisely on the defined day of the holiday.

The holiday omission values available for selection are defined in the Serial Patterns Configuration policies of your library.

Example

Omit by holiday in a publication statement structured in the following way: published daily except Thanksgiving, Christmas, and New Years' Day.

Continuous Numbering


When a serial control pattern uses a continuous numbering scheme on the second level of enumeration, the first level of enumeration may not increment as expected. For example, the library receives a title with a monthly frequency. The enumeration pattern uses a volume and number, and the number is continuous. After 12 issues, the volume should increase. Therefore, the enumeration section of the Patterns tab will use two levels of enumeration – V and NO. The NO. level will be checked off as continuous with a limit of 12. Let's say that the first issue predicted will be V. 22 NO 30, OCT 2005. When creating the predictions, you might expect the volume to increase on the January issue. When creating the predictions, however, it won't. The volume increases on the May 2006 issue.

Enumeration	Chronology	Date expected
V. 22 NO. 30	OCT 2006	10/1/2006
V. 22 NO. 31	NOV 2006	11/1/2006
V. 22 NO. 32	DEC 2006	12/1/2006
V. 22 NO. 33	JAN 2007	1/1/2007
V. 22 NO. 34	FEB 2007	2/1/2007
V. 22 NO. 35	MAR 2007	3/1/2007
V. 22 NO. 36	APR 2007	4/1/2007
V. 23 NO. 37	MAY 2007	5/1/2007
V. 23 NO. 38	JUN 2007	6/1/2007
V. 23 NO. 39	JUL 2007	7/1/2007

The software increases the volume when it can evenly divide the limit on the NO. level of enumeration into the number of the issue. When the software made the predictions, the APR 2007 issue had an enumeration of V. 22 NO 36. Referring back to the Patterns tab of the control record, the limit for the NO. level of enumeration was 12 that can evenly divide into the NO. 36. Therefore, the volume increased on the May 2007 issue. You should not be alarmed that the software does this, and it is okay to predict in small amounts in order to manually increment the volume.

Continuous Numbering Procedures

To create a serial control record with one level of enumeration

1. On the Common Tasks toolbar, click the **Create Control** wizard .
2. If the Set Properties window appears, verify the default settings and click **OK**. The Select Search window appears.
3. Search for the title you want.
4. Verify that this is the correct title, and click **Create Control** to create a new serial control record. If you are creating records for a multi-library system, the Library For New Control window appears.

If a title is already under serial control, you may display the existing control, duplicate an existing control, create a new control, or look up another title.

Note If more than one control record is associated with a title, the List of Controls Found on Lookup window appears. You may select one to display or duplicate, create a new control, or look up another title.

5. In the **Library** box, select a library that will receive the issues.
6. In the **Holding Code** box, select an appropriate code established by your library. The holding code selected must distribute copies to the library that is selected. It also helps with barcoding and OPAC display. We will discuss this in more detail later.
7. Click **OK**. The Select a Pattern Template window may appear.
8. Click the publication frequency template for this title from the left column and click **OK**. The Creating Control ID window appears.
9. Click the **Patterns** tab.
10. Select the **Use** box for the first label. Verify that no other Use boxes are selected.
11. Type or use the label gadget to enter the appropriate label. For this example, use **NO**.

Create Control : Creating a Control ID SC-56

Time ID: SC-56 Ctrl lib: CARNEGIE

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

Enumeration pattern

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

Chronology pattern

Chronology type:

Publication pattern

Allow automatic prediction of issues

Publication cycle:

Days to wait before claiming:

Days before subsequent claim:

Create Control Return to Search New Search (b) Cancel


12. Click **Create Control**. The Get Expected Issue Info window appears.
13. Type the number of issues to preview.
14. Type the number that the serial starts with in the **NO.** box.
15. Type the **Chronology**.
16. Type the **Date First Prediction** and **Date Expected**, or use the date gadgets.
17. Click **Generate Predictions**.


Time
ID: SC-56 Ctrl lib: CARNEGIE

Prediction Records

Preview expected issues starting with:
NO.

Chronology:

Date first prediction: 


Date expected: 

Prediction Records

Enumeration »	Chronology	Date expected
NO. 39441	AUG 7, 2006	8/7/2006
NO. 39442	AUG 8, 2006	8/8/2006
NO. 39443	AUG 15, 2006	8/15/2006
NO. 39444	AUG 22, 2006	8/22/2006
NO. 39445	AUG 29, 2006	8/29/2006
NO. 39446	SEP 5, 2006	9/5/2006
NO. 39447	SEP 12, 2006	9/12/2006
NO. 39448	SEP 19, 2006	9/19/2006

Notice that even when the chronology changes to JAN 2, 2006, the enumeration continues to increment by one. You can also have continuous numbering for issues that have a volume and number associated with them.

To create a serial control record with two levels of enumeration

1. On the Common Tasks toolbar, click the **Create Control** wizard .
2. If the Set Properties window appears, verify the default settings and click **OK**. The Select Search window appears.
3. Search for the title you want.
4. Verify that this is the correct title, and click **Create Control** to create a new serial control record. If you are creating records for a multi-library system, the Library For New Control window appears.

If a title is already under serials control, you may display the existing control, duplicate an existing control, create a new control, or look up another title.

Note	If more than one control record is associated with a title, the List of Controls Found on Lookup window appears. You may select one to display or duplicate, create a new control or look up another title.
-------------	---

5. In the **Library** box, select a library that will receive the issues.
6. In the **Holding Code** box, select an appropriate code established by your library.
7. Click **OK**. The Select a Pattern Template window appears.
8. Click the publication frequency template for this title from the left column and click **OK**. The Creating Control ID window appears.
9. Click the **Patterns** tab.
10. Select the **Use** box for the first two labels.
11. Type or use the label gadget to select a label. For this example, use **V.** and **NO**.
12. Select the **Continuous** box for the second label.
13. Type the number of issues to preview in the **Limit** box.

Time
ID: SC-57 Ctrl lib: CARNEGIE

MARC Holdings Subscription Distribution Binding Extended Info Expected Routing

Basic Patterns OPAC Display

Enumeration pattern

Use	Label	Alpha	Numeric	Continuous	Limit
<input checked="" type="checkbox"/>	V. <input type="text"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	NO. <input type="text"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	52
<input type="checkbox"/>	<input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	

Chronology pattern

Chronology type:

Publication pattern

Allow automatic prediction of issues

Publication cycle:

Days to wait before claiming:

Days before subsequent claim:

14. Click **Create Control**. The Get Expected Issue Info window appears.
15. Type the volume and number that serial starts with in the **V.** and **NO.** boxes.
16. Type the **Chronology**.
17. Type the **Date First Prediction** and **Date Expected**, or use the date gadgets.
18. Click **Generate Predictions**.

Create Control : Get Expected Issue Info

Time ID: SC-57 Ctrl lib: CARNEGIE

Prediction Records

Preview expected issues starting with:
 V.
 NO.

Chronology:

Date first prediction:

Date expected:

Prediction Records

Enumeration »	Chronology	Date expected
V. 436 NO. 7049	AUG 7, 2006	8/7/2006
V. 436 NO. 7050	AUG 8, 2006	8/8/2006
V. 436 NO. 7051	AUG 15, 2006	8/15/2006
V. 436 NO. 7052	AUG 22, 2006	8/22/2006
V. 436 NO. 7053	AUG 29, 2006	8/29/2006
V. 436 NO. 7054	SEP 5, 2006	9/5/2006
V. 436 NO. 7055	SEP 12, 2006	9/12/2006

Notice that the enumeration NO. continues to increment by one while the volume changes with the JAN 5, 2006 issue. If this volume change is inappropriate, generate predictions with a smaller preview number to adjust the enumeration.

Creating Predictions One at a Time

The Expected tab creates a prediction record. A prediction record contains information about a particular issue such as enumeration, chronology, and number of copies expected.




The screenshot shows a software window titled "Create Control : Modifying Control ID SC-57". At the top, it displays "Time ID: SC-57" and "Ctrl lib: CARNEGIE". Below this are several tabs: "Basic", "Patterns", "OPAC Display", "MARC Holdings", "Subscription", "Distribution", "Binding", "Extended Info", "Expected", "Received", "Claimed", and "Routing". The "Expected" tab is active, showing a table with the following data:

Expect...	Enumeration	Chronology	Date expected	Receipt status
Y	V. 436 NO. 7049	AUG 7, 2006	8/7/2006	none rcvd
	V. 436 NO. 7050	AUG 8, 2006	8/8/2006	none rcvd
	V. 436 NO. 7051	AUG 15, 2006	8/15/2006	none rcvd
	V. 436 NO. 7052	AUG 22, 2006	8/22/2006	none rcvd
	V. 436 NO. 7053	AUG 29, 2006	8/29/2006	none rcvd
	V. 436 NO. 7054	SEP 5, 2006	9/5/2006	none rcvd
	V. 436 NO. 7055	SEP 12, 2006	9/12/2006	none rcvd
	V. 436 NO. 7056	SEP 19, 2006	9/19/2006	none rcvd

At the bottom of the window are buttons for "Modify Control", "Duplicate Control", "Return to Search", "New Search (b)", and "Close".

To create a prediction, click **Create Single Prediction** .

The screenshot shows a software window titled "Create Control : Creating A Prediction". At the top, it displays "Time ID: SC-57" and "Ctrl lib: CARNEGIE". Below this is a section titled "Predicted Issue Information" with the following fields:

- Enumeration:
- Chronology:
- Date expected:  Number expected:
- Date prediction:  Date to claim: 
- Comment:

At the bottom of the window are buttons for "Create Prediction" and "Close".

The **Enumeration** box identifies an issue of a serial title by the numeric information printed on a particular issue. This may generally be defined as the volume, issue, and any item numbers displayed on the issue. Each prediction record includes an enumeration box.

The **Chronology** box contains the date published on the issue.

Click the **Date Expected** gadget to select the date that you expect to receive the next issue for this generated prediction. To calculate this date, add a fixed number of days to the date published.

Click the **Date Prediction** gadget to select the expected or predicted date of publication for the first issue of this generated prediction. The date prediction typically correlates with the issue's Chronology box. The Date Prediction links the prediction's chronology to the publication pattern of the serial control record. This date represents the chronology on the issue.

Type the number of copies you expect for an entire issue in the **Number Expected** box. This number should equal the Copies to Receive value in the Subscription tab.

Click the **Date to Claim** gadget to select the date to begin claiming unreceived copies of the issue. Calculate this number by adding the number in the **Days to Wait Before Claiming** box in the Patterns tab of the serial control record to the **Date Expected** you entered on this tab. The Prediction As Late report does this automatically.

In the **Comment** box, you can type a free-text comment associated with the prediction of the record. The maximum number of characters allowed is 80.

Loading Pub Patterns from 891 Entries

In the Create Serial Control or Modify Serial Control wizard work flow, you have the option of loading publication patterns from the 891 entries in bibliographic records, and mapping these entries to the appropriate fields in SirsiDynix Symphony.

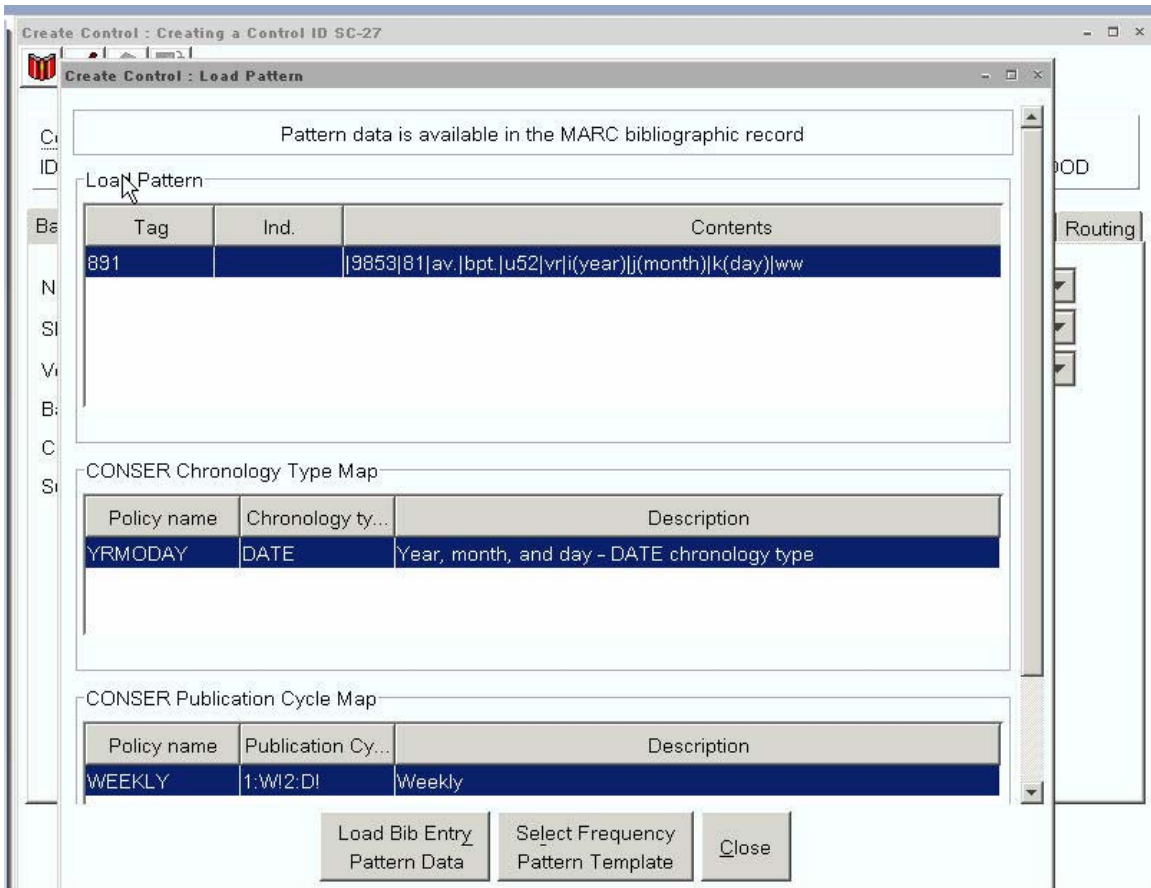
To use the CONSER Publication Pattern Load feature, open the properties for the Serial Control wizard. Click on the Behavior tab and select the Prompt to Load Bibliographic Pub Pattern Data When Available.

When creating a new serial control record (or modify an existing record), and if the bibliographic record contains an 891 entry, SirsiDynix Symphony will evaluate the subfields of the entry and match them to chronology type maps and publication cycle maps defined in SirsiDynix Symphony policies.

When the Load Pub Pattern window opens, do the following:

1. In the **Load Pattern** window, the message "Pattern data is available in the MARC bibliographic record" displays. Below that a table of the 891 entries of the bibliographic record displays. The matching chronology type and publication cycle for each 891 entry appear in panes in the lower half of the Load Pattern window. As you select (highlight) each 891 entry, the chronology type and publication cycle lists are updated. (These policies are listed in the order of the 891 entries.)
2. Select the 891 entry with pub pattern data that best represents the chronology and publication cycle for this serial control.
3. Click **Load Bib Entry Pattern Data**, and the Patterns tab of the serial control record will automatically be populated with the chronology type and publication cycle values.
4. There may be two exceptions to this process.
 - If an 891 entry can be matched to multiple chronology types or publication cycles, the matching values will be listed in the CONSER Chronology Type and CONSER Publication Cycle panes. In these panes, select (highlight) the values that best represent the chronology and publication cycle for this serial control. Click **Load Bib Entry Pattern Data**, and the Patterns tab will be populated with chronology type and publication cycle values.



- If you do not see an 891 that adequately represents the publication frequency for this serial, click **Select Frequency Pattern Template**, and the Select a Pattern Template window will open. This window displays matching pattern templates defined in serial control policies. Select a pattern template and click **OK** to load the pattern. If you click **Return to Bib Entry List**, the pattern will not load, and you will return to the list of 891 entries in the Load Pub Pattern window.

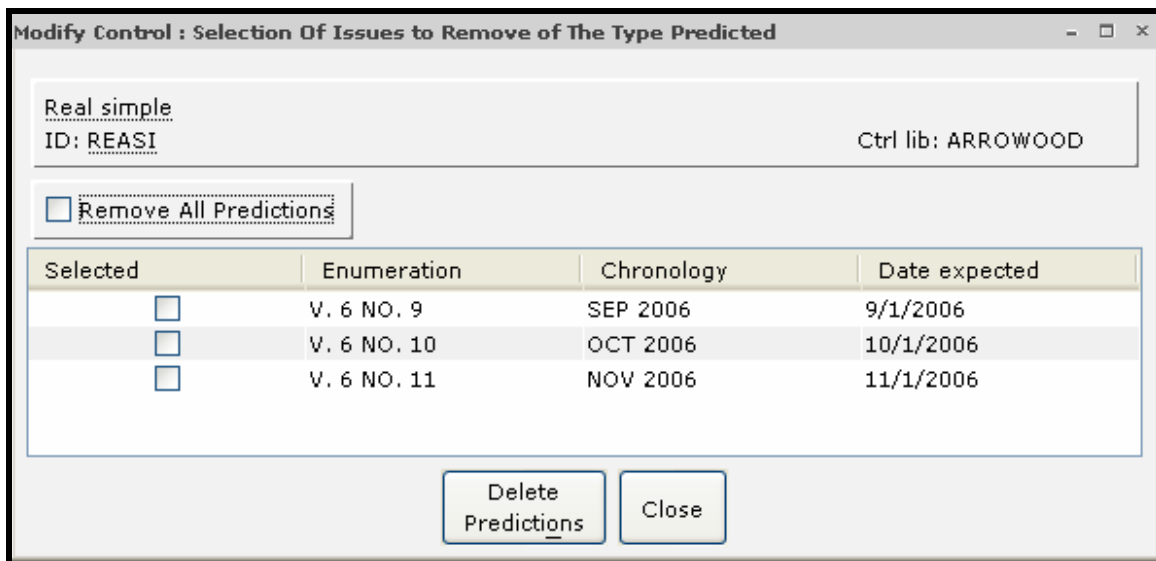


Remove a Prediction

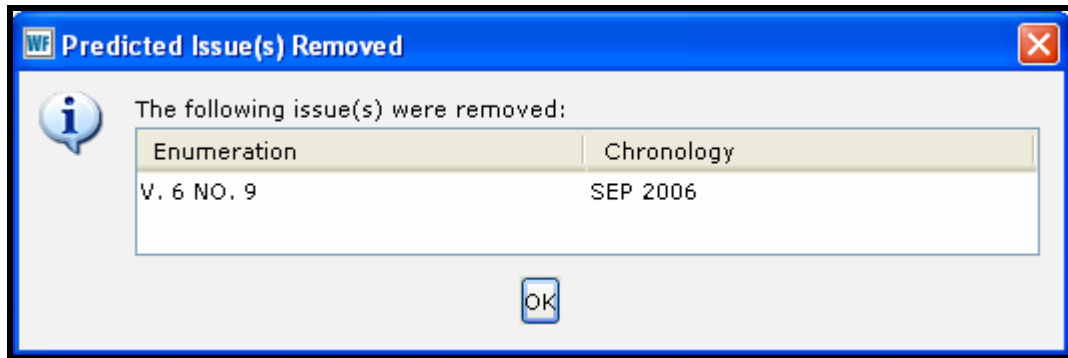
If a pattern changes or predictions were created in error, you will need to remove the predictions.

To remove a prediction

1. On the Common Tasks toolbar, click the **Modify Control** wizard .
2. If the Set Properties window appears, verify the default settings and click **OK**. The Select Search window appears.
3. Search for the title you want to modify.
4. Click the **Expected** tab.
5. Click **Delete Prediction(s)** . The following window appears:



6. Select the box of each expected issue to remove.
-Or-
Select the **Remove All Predictions** box.
7. Click **Delete Predictions**. The Predicted Issue(s) Removed dialog box appears:




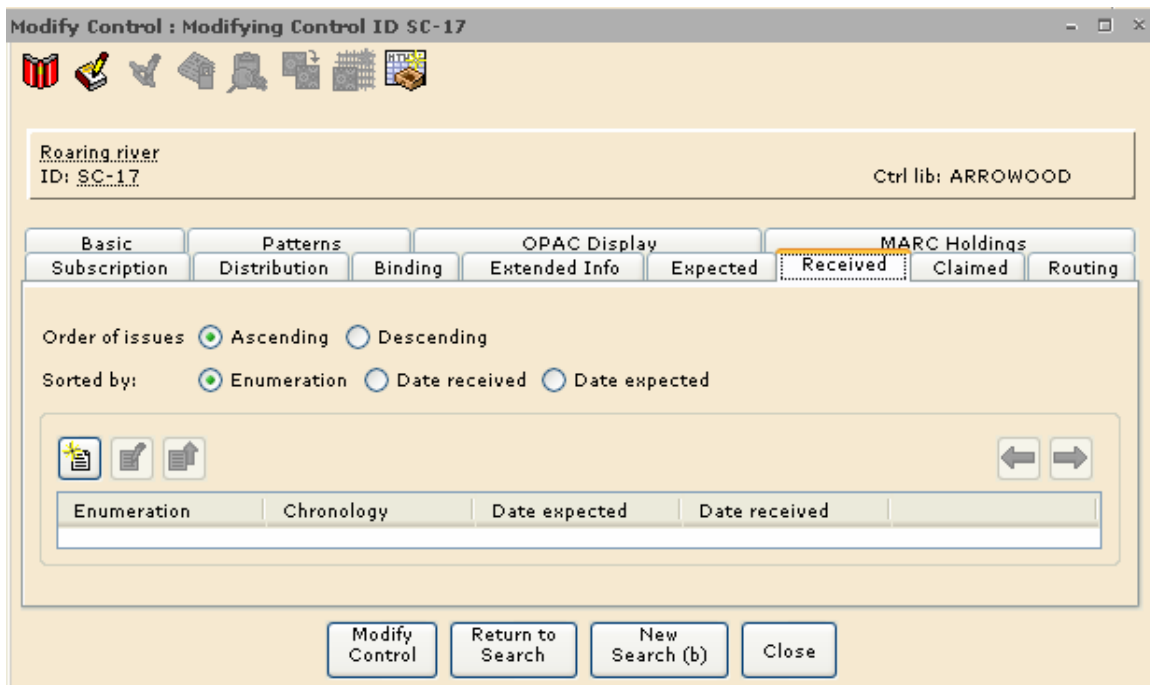
8. Click **OK** to return to the Expected tab.
9. Click **Close** to exit.

Unreceive an Issue

If an issue is received in error, you can remove it. However, if the MARC holdings were updated, those will need to be manually corrected. Also, if copies were created when the issues were received, the copies will need to be removed before the issues can be received again. WorkFlows displays a warning to remind you when unreceiving the issues.

To unreceive an issue

1. On the Common Tasks toolbar, click the **Modify Control** wizard .
2. If the Set Properties window appears, verify the default settings and click **OK**. The Select Search window appears.
3. Search for the title you want to unreceive.
4. Click the **Received** tab. There are two sort order options for the received issues that display on the Received tab.
 - Order of Issues – Issues can be sorted in ascending or descending order.
 - Sorted By – Issues can be sorted by enumeration, date received, or date expected.



Modify Control : Modifying Control ID REASI


Real simple
ID: REASI Ctrl lib: ARROWOOD

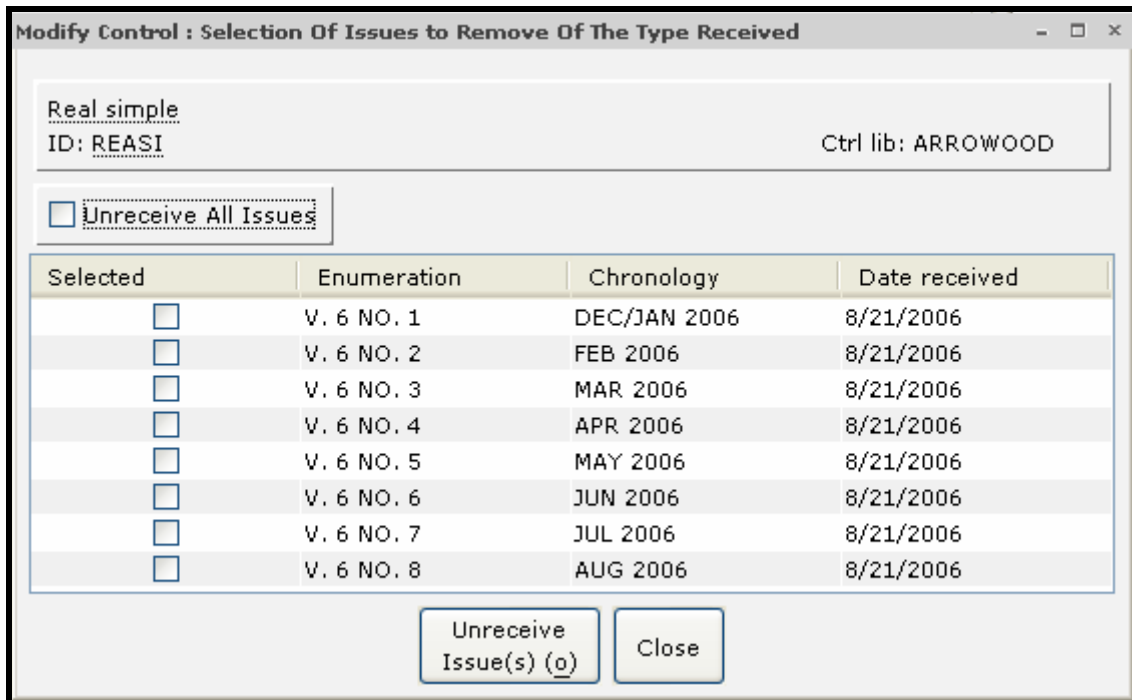
Basic Patterns OPAC Display **MARC Holdings** Subscription
 Distribution Binding Extended Info Expected Received Claimed Routing

Sorted by: Enumeration Date received Date expected

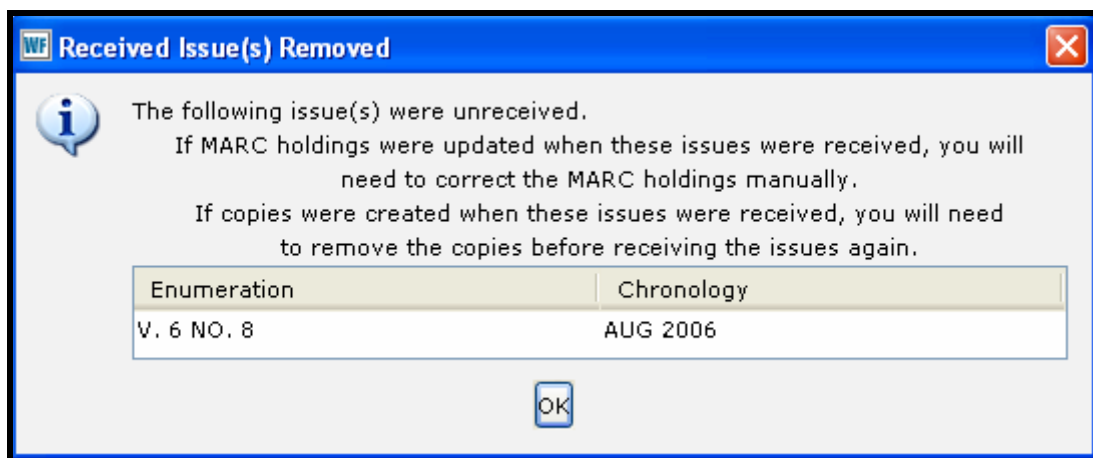
Enumeration »	Chronology	Date expected	Date received	
V. 6 NO. 1	DEC/JAN 2006	1/1/2006	8/21/2006	more
V. 6 NO. 2	FEB 2006	2/1/2006	8/21/2006	more
V. 6 NO. 3	MAR 2006	3/1/2006	8/21/2006	more
V. 6 NO. 4	APR 2006	4/1/2006	8/21/2006	more
V. 6 NO. 5	MAY 2006	5/1/2006	8/21/2006	more
V. 6 NO. 6	JUN 2006	6/1/2006	8/21/2006	more
V. 6 NO. 7	JUL 2006	7/1/2006	8/21/2006	more
V. 6 NO. 8	AUG 2006	8/1/2006	8/21/2006	more

Modify Control Return to Search New Search (b) Close

- Click **Unreceive Issue(s)** . The following window appears:



- Select the box of each received issue to unreceive.
-Or-
Select the **Unreceive All Issues** box.
- Click **Unreceive Issue(s)**. The Received Issue(s) Removed dialog box appears:



- Click **OK** to return to the Expected tab.
- Click **Close** to exit.

OPAC Display of Serial Holdings

Overview

In this chapter you will learn how the Serial Control module uses three automated methods to present serial holdings in the OPAC. Depending on the settings you activate in the serial control record, the OPAC can be updated automatically with holdings information as you check-in issues. Because the settings are established in the control record, your library can decide on a title-by-title basis which of the following options to enable.

- Recently arrived issues – updating the 599 entry of the bibliographic record
- Volume holdings – creating call number and item records
- MARC holdings – updating a MARC formatted holdings record


Recently Arrived Issues

- A 599 box of the bibliographic record associated with the serial control record can be automatically updated with issues as they are received by the Check In wizard.
- The 599 displays within the bibliographic record as a “Recently Arrived” note.
- The 599 is not intended to represent all issues of a title. It is designed to display a short list of issues that were recently checked in.
- It is necessary to establish settings in the control record to automatically update the 599. You can choose the maximum number of issues to display at any given time. Once the maximum is reached, the oldest issues are replaced as newer issues are checked in.
- A setting in the control record also allows the library to decide whether or not to display the enumeration, chronology or both the enumeration and the chronology if the received issues are in the 599.

- In a multi-library setting, each library is assigned one 599 entry. When the control record is set to update a 599, the 599 will be created in the bibliographic record after the first issue is checked in.
- If one library has several control records attached to a title (for example, a control record for a newspaper and another for microfilm), both control records will update the same 599. Libraries typically select one control record to update a 599 and disable the setting for the other.
- Libraries typically select impermanent materials to update a 599 and use one of the other OPAC update options to represent permanent materials.

Item Information	Catalog Record
Mental floss (Durham, N.C.)	
ISSN: 1543-4702	
Uniform title: Mental floss (Durham, N.C.)	
Key title: Mental floss (Durham, N.C.)	
Title: Mental floss.	
Publication info: Durham, NC : Mental Floss Magazine, c2001-	
Current frequency: Bimonthly	
Volume/date range: Vol. 1, issue 1-	
Recently arrived: ARROWOOD--V. 4 NO. 4 JUL/AUG 2005;V. 4 NO. 3 MAY/JUN 2005;V. 4 NO. 2 MAR/APR 2005;	
Subject term: Curiosities and wonders--Periodicals.	
Subject term: Popular culture--Periodicals.	

*The **Recently Arrived** issues display in the online catalog.*



Control Record Settings for Updating a 599

There are settings on the OPAC Display tab that control whether or not a 599 in the bibliographic record should be updated.

The screenshot shows a dialog box titled "Create Control : Creating a Control ID SC-93". At the top, it displays "Newsweek" and "ID: SC-93" on the left, and "Ctrl lib: ROCKEFELLR" on the right. Below this are several tabs: "Distribution", "Binding", "Extended Info", "Expected", and "Routing". Underneath these are sub-tabs: "Basic", "Patterns", "OPAC Display" (which is highlighted with a dotted border), "MARC Holdings", and "Subscription". In the "OPAC Display" section, there is a checkbox for "Automatically update MARC holdings" which is unchecked. Below that is a text input field for "Number of most recently arrived issues to display as a note:" with the value "1". At the bottom of this section are three radio buttons for "Form of name to display:": "Enumeration", "Chronology", and "Both", with "Both" selected. At the very bottom of the dialog are four buttons: "Create Control", "Return to Search", "New Search (b)", and "Cancel".

Settings to Consider

The **Number of Most Recently Arrived Issues to Display as a Note** box determines the number of issues to display in the 599 entry.


The **Form of Name to Display** option determines what issue information will be transferred to the 599 field of the bibliographic record.

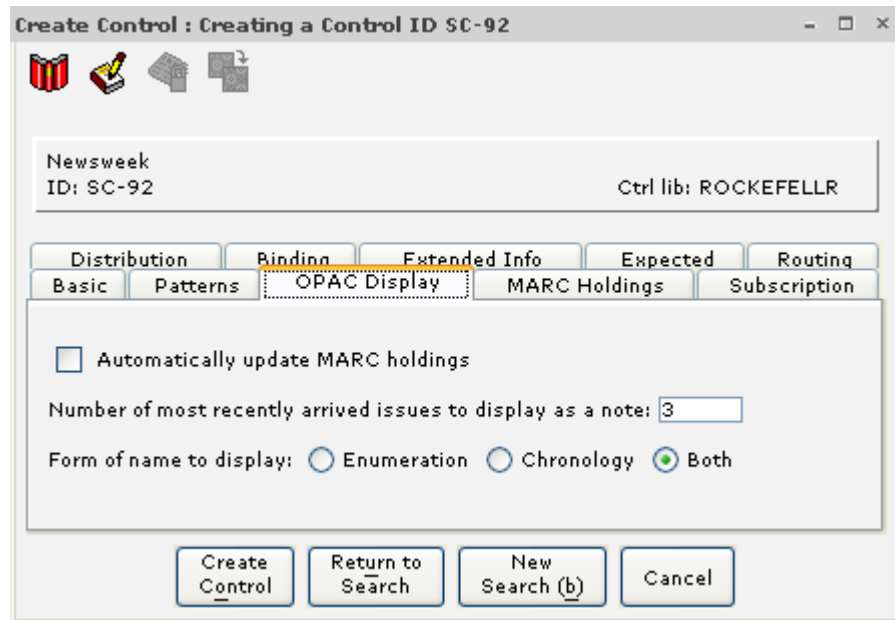
- **Enumeration** = Volume, No.
- **Chronology** = Month, Year (only displays in iBistro)
- **Both** = Volume, No., Month, Year

For more information about enumeration and chronology patterns, see "Patterns Tab" on page 49.

If the serial control record uses only enumeration, for example, select **Enumeration** to display in the online catalog. If you select **Both**, the enumeration is repeated twice in the 599. Technically, the enumeration is written to the check-in record twice when chronology is not used, although you cannot see it graphically in WorkFlows. The same scenario would be true for a control record that uses chronology only.

To create a serial control record and update the 599

1. On the Common Tasks toolbar, click the **Create Control** wizard .
2. If the Set Properties window appears, verify the default settings and click **OK**. The Select Search window appears.
3. Search for the title you want to create a control record.
4. Verify that this is the correct title, and click **Create Control** to create a new serial control record. If you are creating records for a multi-library system, the Library For New Control window appears.
5. In the **Library** box, select a library that will receive the issues.
6. In the **Holding Code** box, select an appropriate code established by your library.
7. Click **OK**. The Select a Pattern Template window may appear.
8. Click the publication frequency template for this title from the left column and click **OK**. The Creating Control ID window appears.
9. Enter the information needed for your control record on the **Basic**, **Subscription**, **Patterns**, and **Extended Info** tabs.
10. Click the **OPAC Display** tab.
11. Type the **Number of most recently arrived issues to display as a note**.
12. Select **Enumeration**, **Chronology**, or **Both** for the Form of Name to Display.



13. Click **Create Control**. The Get Expected Issue Info window appears.
14. Type the number to preview expected issues.
15. Type the number of the volume and number of the issue in the **V.** and **NO.** boxes.
16. Type the **Chronology**.
17. Type or use the date gadgets to enter a **Date First Prediction** and **Date Expected**.
18. Click **Generate Predictions**. The Prediction Records appear.
 - If satisfactory, click **Save Predictions**. Click **OK** to confirm.
 - If not satisfactory, click **Redo Predictions**. Repeat steps 14-18.
19. Click **OK** to confirm that the record was created and return to the control record's Basic tab.
20. From here you can:
 - Make any additional changes to the information and click **Modify Control**.
 - Click **Return to Search** to go back to the previous search results.
 - Click **New Search** to perform another title search.
 - Click **Close** to exit the wizard.

Volume Holdings

- You can configure a serial control record to create a call number and a barcoded item upon check-in.
- When you check-in an issue, SirsiDynix Symphony 3.2 attaches a call number and item to the title record.
- Creating volume/item holdings is helpful when you want to circulate the issues.
- Typically, libraries use this option only when they want to retain materials permanently and/or circulate them.
- The call number and class scheme in the Basic tab of the serial control record play important roles when creating the volume/item holdings.

Item Information	Catalog Record																				
<p>Mental floss (Durham, N.C.)</p> <p>Publisher: Mental Floss Magazine, Pub date: c2001- Pages: v. : Copy info: 4 copies available at E. A. Arrowood Foundation Library. 4 copies total in all locations.</p> <p>Holdings</p> <table border="0"> <thead> <tr> <th style="text-align: left;">E. A. Arrowood Foundation Library</th> <th style="text-align: left;">Copies</th> <th style="text-align: left;">Material</th> <th style="text-align: left;">Location</th> </tr> </thead> <tbody> <tr> <td>AG240 .M46 V. 4 NO. 4 JUL/AUG 2005</td> <td>1</td> <td>Magazine</td> <td>Standard shelving location</td> </tr> <tr> <td>AG240 .M46 V. 4 NO. 3 MAY/JUN 2005</td> <td>1</td> <td>Magazine</td> <td>Standard shelving location</td> </tr> <tr> <td>AG240 .M46 V. 4 NO. 2 MAR/APR 2005</td> <td>1</td> <td>Magazine</td> <td>Standard shelving location</td> </tr> <tr> <td>AG240 .M46 V. 4 NO. 1 JAN/FEB 2005</td> <td>1</td> <td>Magazine</td> <td>Standard shelving location</td> </tr> </tbody> </table>		E. A. Arrowood Foundation Library	Copies	Material	Location	AG240 .M46 V. 4 NO. 4 JUL/AUG 2005	1	Magazine	Standard shelving location	AG240 .M46 V. 4 NO. 3 MAY/JUN 2005	1	Magazine	Standard shelving location	AG240 .M46 V. 4 NO. 2 MAR/APR 2005	1	Magazine	Standard shelving location	AG240 .M46 V. 4 NO. 1 JAN/FEB 2005	1	Magazine	Standard shelving location
E. A. Arrowood Foundation Library	Copies	Material	Location																		
AG240 .M46 V. 4 NO. 4 JUL/AUG 2005	1	Magazine	Standard shelving location																		
AG240 .M46 V. 4 NO. 3 MAY/JUN 2005	1	Magazine	Standard shelving location																		
AG240 .M46 V. 4 NO. 2 MAR/APR 2005	1	Magazine	Standard shelving location																		
AG240 .M46 V. 4 NO. 1 JAN/FEB 2005	1	Magazine	Standard shelving location																		

Basic Tab

- Type the appropriate information in the **Base Call Number** box. SirsiDynix Symphony 3.2 attaches the enumeration and chronology to the end of the base call number when creating the volume/item.
- Select the **Class Scheme** carefully; usually, LCPER is the preferred class scheme because of the reverse chronological sort rule.

Create Control : Creating a Control ID SC-92

Newsweek
ID: SC-92 Ctrl lib: ROCKEFELLR

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

New control ID: NEWSWEEK Status: ACTIVE

SISAC ID: 1543-4702 Category 1:

Vendor title#: Category 2:

Base call number: AG240 .M46 Date created: 8/9/2006

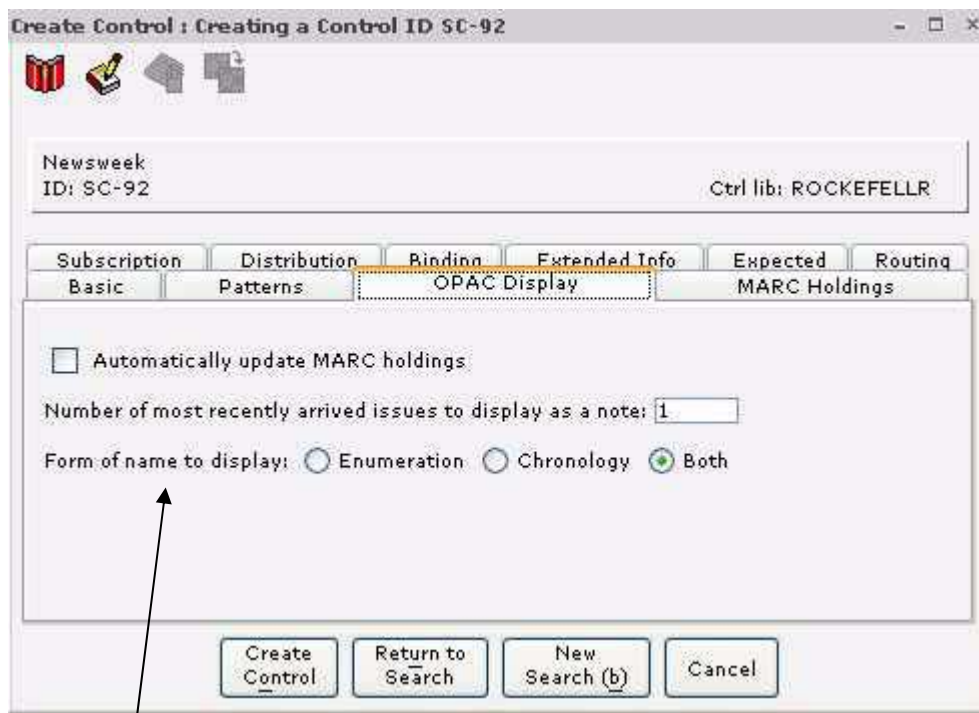
Class scheme: LCPER

Subscription ID:

*Be sure to enter the appropriate information in the **Base Call Number** and **Class Scheme** fields when creating volume holdings.*

OPAC Display Tab

- The **Form of Name to Display** option plays a role in creating the call number. Choose the appropriate piece of the check-in to attach to the end of the call number. If the pattern uses enumeration or chronology only, be sure to select the correct button. If you select **Both**, when the pattern uses only enumeration, the call number created will show the enumeration twice. The same holds true if the pattern used chronology only and you selected **Both**.



*The **Form of name to display** helps determine the call number when creating volumes.*

Distribution Tab

- The **Holding Code** provides required copy-level information (item type and shelf location) for the item that is added to the catalog.
- The **Copies to Add to Catalog** box in a distribution record indicates the number of copies expected for a particular serial distribution that should have item records created in the catalog. The default value for this box is zero.

Create Control : Modifying A Serial Distribution

Newsweek
ID: NEWSWEEK Ctrl lib: ROCKEFELLR

Receiving 1 ALL copies
1 copies distributed

Distribution Information



Holding code: ROC_PERIOD Update MARC holdings records

Copies expected: 1 Copies to add to catalog: 1

Modify Distribution Close

Selecting the **Holding Code** and number of **Copies to add to catalog** is the final step to creating volume holdings for display in the OPAC.

To create a volume holdings

1. On the Common Tasks toolbar, click the **Create Control** wizard .
2. If the Set Properties window appears, verify the default settings and click **OK**. The Select Search window appears.
3. Search for the title you want to create a control record.
4. Verify that this is the correct title, and click **Create Control** to create a new serial control record. If you are creating records for a multi-library system, the Library For New Control window appears.
5. In the **Library** box, select a library that will receive the issues.
6. In the **Holding Code** box, select an appropriate code established by your library.
7. Click **OK**. The Select a Pattern Template window may appear.
8. Click the publication frequency template for this title from the left column and click **OK**. The Creating Control ID window appears.
9. On the Basic tab, type the appropriate information in the **Base Call Number** box.
10. Select the **Class Scheme**.
11. Enter the information needed for your control record on the **Subscription**, **Patterns**, and **Extended Info** tabs.
12. Click the **OPAC Display** tab.
13. Select **Enumeration**, **Chronology**, or **Both** for the Form of Name to Display.
14. Click the **Distribution** tab.
15. Click the **Modify a Distribution** tool .
16. Type the number of copies in the **Copies to Add to Catalog** box to create at check-in.
17. Select the appropriate **Holding Code** that represents the library, location, and item type of the material.
18. Click **Modify Distribution** to return to the Distribution tab.
19. Click **Create Control**. The Get Expected Issue Info window appears.
20. Type the **number to preview expected issues**.

21. Type the number of the volume and number of the issue in the **V.** and **NO.** boxes.
22. Type the **Chronology**.
23. Type or use the date gadgets to enter a **Date First Prediction** and **Date Expected**.
24. Click **Generate Predictions**. The Prediction Records appear.
 - If satisfactory, click **Save Predictions**. Click **OK** to confirm.
 - If not satisfactory, click **Redo Predictions**. Repeat steps 20-24.
25. Click **OK** to confirm that the record was created and return to the control record's Basic tab.
26. From here you can:
 - Make any additional changes to the information and click **Modify Control**.
 - Make any additional changes to the information and click **Duplicate Control**.
 - Click **Return to Search** to go back to the previous search results.
 - Click **New Search** to perform another title search.
 - Click **Close** to exit the wizard.

MARC Holdings

- You can configure a serial control record to create and update a MARC holdings record when you check-in issues.
- Usually, MARC holdings records represent materials that the library permanently retains. Using a MARC holdings record for materials that are not permanent would require more catalog maintenance time to remove holdings that are no longer part of the library's collection.
- A MARC holdings record would typically be used for materials such as bound volumes, binder sets, microfilm, and other permanently retained materials.
- The basic structure of a MARC holdings record (when created and updated by the serial control record) includes a key (001), location (852), pattern (853), and holdings (863).

Item Information
Catalog Record

Consumer reports
Consumers Union of United States.

Publisher: Consumers Union of United States,
Pub date: c1942-
Pages: v. :
Copy info: No copies available in any library.

ARROWOOD
Location: STACKS--
Holdings: v.70:no.1 (2005:Jan.) - v.70:no.7 (2005:July)

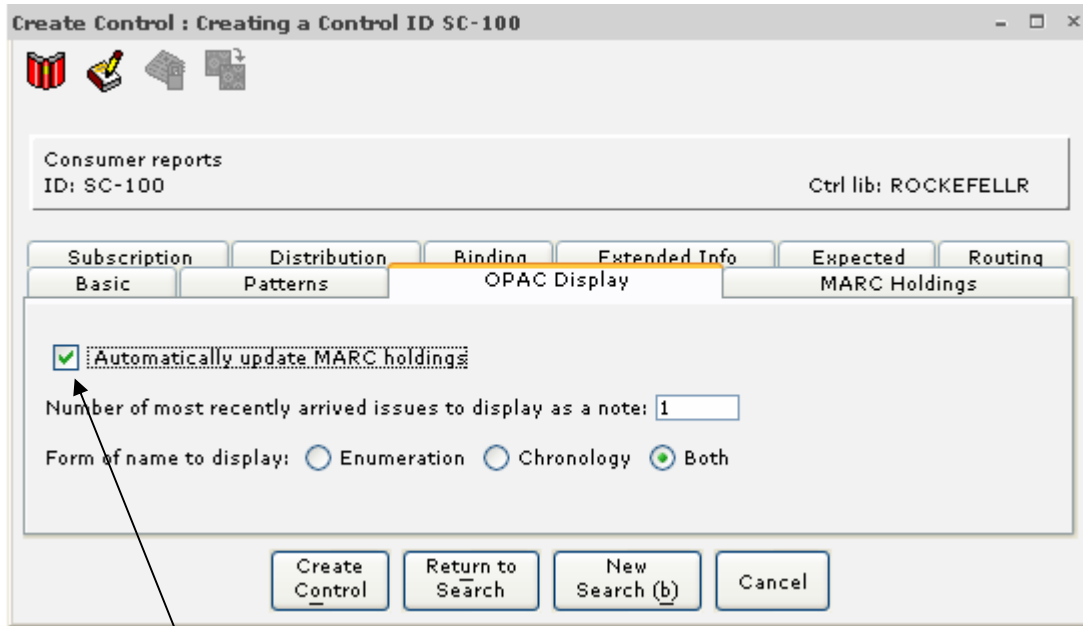
*The **MARC Holdings** display in the online catalog.*

Holdings
E. A. Arrowood Foundation Library Copies Material Location

TX335 .A1 C6	NONE
--------------	------

OPAC Display Tab

- To create and update the MARC holdings record when you check-in issues, select the **Automatically Update MARC Holdings** option.



Consumer reports
ID: SC-100 Ctrl lib: ROCKEFELLR

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

Automatically update MARC holdings

Number of most recently arrived issues to display as a note: 1

Form of name to display: Enumeration Chronology Both

Create Control Return to Search New Search (b) Cancel

Select the **Automatically update MARC holdings** option to update the MARC holdings display in the OPAC.

Distribution Tab

The **Update MARC Holdings Records** option must be selected for each distribution record for which you want to create MARC holdings. To enable this box, you must also enable the Automatically Update MARC Holdings box in the OPAC Display tab.

Click the **Modify a Distribution** tool. Select the **Update MARC Holdings Record** button and click **Modify Distribution** to return to the Distribution tab. This box gives the distribution permission to create and update MARC holdings. Under the Update Holdings column, a “Y” appears if selected.

Create Control : Modifying A Serial Distribution

Real simple organized home
ID: SC-24 Ctrl lib: ARROWOOD

Receiving 1 copies
ALL copies distributed

Distribution Information

Holding code: SERIALS Update MARC holdings records

Copies expected: 1 Copies to add to catalog: 0

Modify Distribution Close

Select the **Update MARC holdings records** option to create and update MARC holdings for this distribution.

Automatically Updating MARC Holdings Flexibility

Why does the control record have two places that I must check to create/update MARC holdings?

The answer is flexibility. The OPAC Display tab grants general permission to the serial control record to create/update MARC holdings. The Distribution tab offers a second layer of permission. The holding code specified in the Distribution tab is the central component in determining where the issues belong.

For example, the library receives two issues of a quarterly publication. Copy 1 is shelved in Periodicals, and copy 2 is shelved in the Reference location. Create the serial control record with two distribution lines; each line (copy) has a different holding code that indicates the appropriate location. The distribution line for each copy can update holdings in case you do not want to create/update a MARC holdings record for each location.

In a multi-library setting where receiving and checking in serial issues is a centralized process; distribution works in nearly the same way. Keep in mind that holding codes not only specify a location in the library, but also the library itself. If several libraries each receive a copy checked in on one control record, each library has its own distribution line. Each library could then decide whether or not to update/create MARC holdings.

Example

Set up two formats for the same title – the single-issue magazine and the bound volumes. You could create two control records for each format. For this example, the following parameters are used.

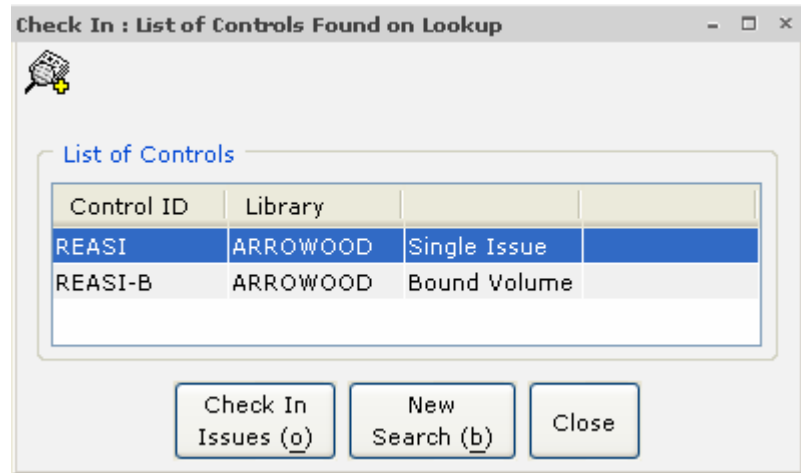
- Serial name – Biography, a monthly publication.
- Bind 12 issues into one volume every year.
- Update MARC holdings with the bound volumes.
- Do not barcode the bound volumes.
- Update the 599 to show the single issues in the Recently Arrived note.

	Control Record #1 Settings	Control Record #2 Settings
Patterns tab	Set up as monthly .	Set up as an annual .
OPAC Display tab	Do not update MARC holdings. Enter the number of recently arrived issues to display as a note.	Update MARC holdings. Enter 0 for the number of recently arrived issues to display as a note.
Distribution tab	Do not add copies. Do not update MARC holdings.	Do not add copies. Update MARC holdings.
Extended Info tab	In the Physform box, type single issue .	In the Physform box, type bound volume .

When you create a serial control record for the single issue, you “expect” the issue, and you can claim it if it does not arrive on time. It also lets you show recently arrived issues as a note in the 599 field of the bibliographic record.

Because you bind the single issues (you do not receive the bound volume from a vendor), creating a serial control record is optional (no expecting – no claiming). However, placing the bound volumes under serial control makes it easier to create and update MARC holdings.

This example shows a list of serial control records in both the magazine and bound volume formats.



Understanding the Role of the Distribution Tab

The Distribution tab in the serial control record contains settings that control the display of the MARC holdings record in the OPAC.

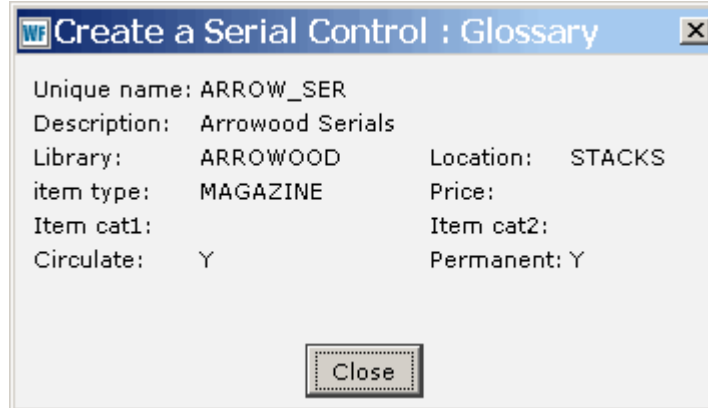
Update MARC Holdings check box

In order to automatically update the MARC holdings record as issues are received, this box must be selected in the Distribution tab of the serial control record.

Holding Code and the 852 entry in the MARC Holdings Record

The holding code is a policy that is established in the SirsiDynix Symphony 3.2 configuration. This code represents item and library values that are used to fill in values of the MARC holdings record.

A holding code contains a series of values that represent item and library locations. There are two values in the holding code that are significant in the context of MARC holdings: library and location.



The location in the holding code is copied into subfield C of the 852 field of the MARC holdings record when the Update MARC holdings records box in the Distribution tab is checked.

The library box of the holding code is presented above the MARC holdings record when it displays in the OPAC.

WF Modify a Serial Control : Modify Selected MARC Holding Record

Rec_Type	y	Enc_Lvl	4	Entrd	050722	Acq_Stat	
Acq_Meth		Can_Date		Gen_Retrn		Sp_Retrn	
Complete		Copies		Lending		Repr	
Lang	eng	Composit		Updated	050722		

Label	Tag	Ind.	Contents
key	001	1	
Location [Rep.]	852		cSTACKS =5
Patterns [Rep.]	853	2	81 av. bno. u26 vr i(year) j(month) k(day)
Holdings [Rep.]	863	1	81.1 a165 b18 i2005 j05 k2
Holdings [Rep.]	863	1	81.2 a165 b19 i2005 j05 k9

The 852 field displays the holding code location.

Save and Close Close

Understanding the Role of Linking

SirsiDynix Symphony 3.2 takes advantage of the formatting for linked fields used by MARC 21. Linking and sequence numbers used in the MARC holdings record help SirsiDynix Symphony 3.2 present a concise holdings summary in the OPAC. In order to facilitate the automatic update of MARC holdings through check-in, SirsiDynix Symphony 3.2 also incorporates linking numbers in the record structure of expected issues.

The 853 Field and the Patterns Tab of the Serial Control Record

- When a serial control record is configured to update MARC holdings, a relationship is formed between the Patterns tab of the control record and the 853 field of the MARC holdings record.
- The Patterns tab is used to create the captions and pattern data for the 853 field in the MARC holdings record according to MARC 21 standards. When SirsiDynix Symphony 3.2 creates an 853, it will also contain a linking number in subfield 8.

- Because pattern and frequency of serial publications sometimes change, you might edit the data in the Patterns tab using the Modify a Serial Control wizard. As a result, a new 853 will be created in the MARC holdings record when the control record is configured to update MARC holdings. When SirsiDynix Symphony 3.2 creates a new 853 in this context, it will contain a new linking number in subfield 8.

WF Modify a Serial Control : Modify Selected MARC Holding Record

Rec_Type	y	Enc_Lvl	4	Entrd	050722	Acq_Stat	
Acq_Meth		Can_Date		Gen_Retrn		Sp_Retrn	
Complete		Copies		Lending		Repr	
Lang	eng	Composit		Updated	050722		

Label	Tag	Ind.	Contents
key	001	1	
Location [Rep.]	852		cSTACKS =5
Patterns [Rep.]	853	2	81 av. bno. u26 vr i(year) j(month) k(day)
Holdings [Rep.]	863	1	81.1 a165 b18 i2005 j05 k2
Holdings [Rep.]	863	1	81.2 a165 b19 i2005 j05 k9

The 853 field contains the pattern data.

Save and Close Close

The 853 and 863 Relationship

- According to MARC 21, the 853 contains a linking number that controls the relationship it has with 863 fields added to the MARC holdings record.
- The 863 fields are linked to an 853 by sharing a common linking number. An 863 uses subfield 8 to represent the linking number used by the 853. The linking number in the 863 also uses a sequence number that is separated from the linking number by a period.
- SirsiDynix Symphony 3.2 uses the linking relationship between 853 and 863 fields as well as sequence numbers to present a concise holdings summary in the OPAC.

Label	Tag	Ind.	Contents
key	001	1	
Location [Rep.]	852		cSTACKS =5
Patterns [Rep.]	853	2	81 av. bno. u26 vr i(year) j(month) k(day)
Holdings [Rep.]	863	1	81.1 a165 b18 i2005 j05 k2
Holdings [Rep.]	863	1	81.2 a165 b19 i2005 j05 k9

The linking number that ties the 853 and 863 fields together.

Holdings Link in the Expected Issue Record

- The database records that represent expected issues contain a box for a holdings link.
- When a serial control record is configured to automatically update MARC holdings, expected issues created through batch prediction will contain the same linking number as the one in subfield 8 of the 853 field.
- SirsiDynix Symphony 3.2 uses this holdings link assigned to the expected issue record in order to correctly add an 863 field to the MARC holdings record when the issue is checked in.

Modify Control : Modifying Prediction Information

Real simple celebrations
ID: REASIC Ctrl lib: ARROWOOD

Predicted Issue Information

Enumeration: V. 1 NO. 4
Chronology: OCT 2006

Date expected: 10/1/2006 Number expected: 1
Date prediction: 10/1/2006 Date to claim: 10/22/2006
Holdings link: 1 Serial holding override:
Comment:


The **Holdings link** is used to add 863 fields to the MARC holdings record.

Typical Maintenance of MARC Holdings Records


Retention and Purging Items from the Collection

- When a library uses a MARC holdings record to represent the physical holdings of a title in the collection, some maintenance of the MARC holdings record is necessary.
- Libraries often follow retention schedules for serial publication in the collection.
- When physical items are purged from the collection, you will want to remove the corresponding information from the MARC holdings records.
- Typically, issues are represented in 863 fields. The 863 fields represent a specific issue that was checked in. Therefore, it will be necessary to remove the 863 fields from the holdings record that correspond to the items removed from the collection.

To remove an 863 field from a MARC record

1. On the Common Tasks toolbar, click the **Modify Control** wizard .
2. If the Set Properties window appears, verify the default settings and click **OK**. The Select Search window appears.
3. Search for the title you want to modify.
4. If more than one serial control record is associated with a title, a list appears on the List of Controls Found on Lookup window.
5. Select a title, and click **Modify Control** to display the serial control record for the selected title.
6. Click the **MARC Holdings** tab.
7. Click the button under the **Location – Linked to** column for the appropriate library. The Modify Selected MARC Holding Record window appears.
8. Select the **863** field to remove.


Note There is no confirmation when you delete the field.

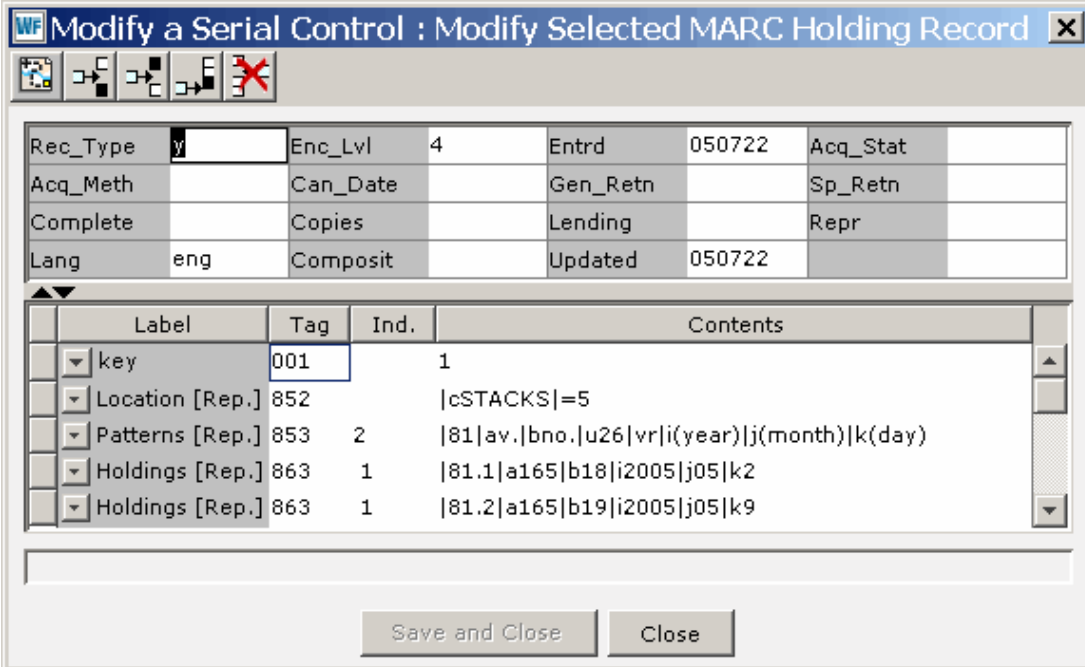
9. Click the **Delete the current field** helper . The field is removed from the record.
10. Click **Save and Close** to save the changes and return to the MARC Holdings tab.

Using the 856 Field of the MARC Holdings Record

Electronic access to subscriptions can be managed in a MARC holdings record. An 856 field can be added to the holdings record that will provide a hypertext link to a web destination or a file in the OPAC display.



To add an 856 field to a MARC record

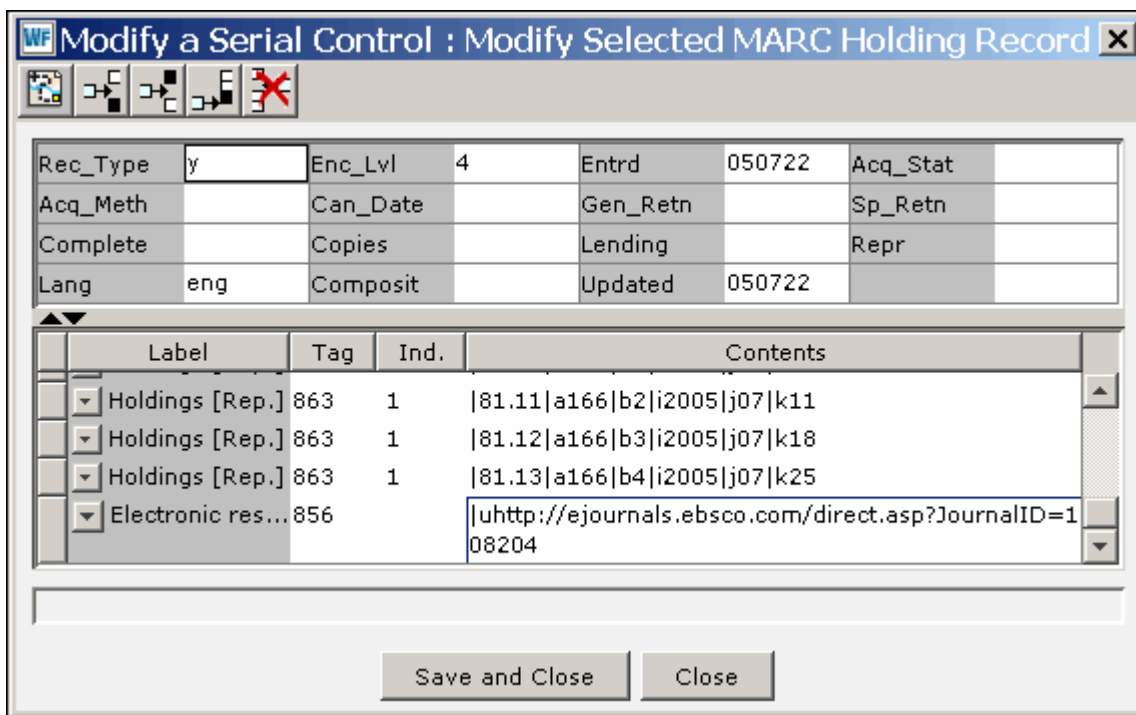
1. On the Common Tasks toolbar, click the **Modify Control** wizard .
2. If the Set Properties window appears, verify the default settings and click **OK**. The Select Search window appears.
3. Search for the title you want to modify.
4. If more than one serial control record is associated with a title, a list appears on the List of Controls Found on Lookup window.
5. Select a title, and click **Modify Control** to display the serial control record for the selected title.
6. Click the **MARC Holdings** tab.
7. Click the button under the **Location – Linked to** column for the appropriate library. The Modify Selected MARC Holding Record window appears:



Label	Tag	Ind.	Contents
key	001	1	
Location [Rep.]	852		cSTACKS =5
Patterns [Rep.]	853	2	81 av. bno. u26 vr i(year) j(month) k(day)
Holdings [Rep.]	863	1	81.1 a165 b18 i2005 j05 k2
Holdings [Rep.]	863	1	81.2 a165 b19 i2005 j05 k9

Buttons: Save and Close, Close

8. Highlight the box where you would like to place the new 856 field.
9. Click the **Insert a field before the current one** helper  to insert a row before the placeholder.
- Or-**
- Click the **Add a field after the current one** helper  to insert a row after the placeholder.
10. In the new Undefined row, type **856** in the Tag column. The label changes to Electronic access [Rep.].
11. Type **u** and the address to provide a hypertext link:



12. Click **Save and Close** to save the changes and return the MARC Holdings tab.

Binding

The Binding tab contains boxes that will be used to indicate specifics about a title for which you want to have issues bound. This information may also be used to schedule serial reports and determine when binding activities need to take place for specified titles.

The screenshot shows a software window titled "Create Control : Creating a Control ID SC-58". The window has a menu bar with icons for a book, a pencil, a folder, and a document. Below the menu bar, there is a header area with "Consumer reports ID: SC-58" on the left and "Ctrl lib: CARNEGIE" on the right. A tabbed interface is visible with tabs for "Basic", "Patterns", "OPAC Display", "MARC Holdings", "Subscription", "Distribution", "Binding" (which is selected and highlighted), "Extended Info", "Expected", and "Routing". The "Binding" tab contains several input fields: "Number to bind:" (empty), "Copies to bind:" (0), "Type of binding:" (empty), "Material:" (empty), "Color:" (empty), and "Binding title:" (empty). To the right of these fields are "Date to bind:" and "Date sent to bindery:" (both empty), each with a calendar icon. At the bottom of the window are four buttons: "Create Control", "Return to Search", "New Search (b)", and "Cancel".

The **Number to Bind** box contains the number of issues that will be bound in a single volume.

The **Copies to Bind** box contains the number of copies that will be bound in a single volume.

The **Type of Binding** box may contain instructions to library staff or the binding agent. In cases where your library binds materials in different ways, such as hard bound or spiral bound, this field may also be used. This is an optional, 40-character field.

The **Material** box may contain instructions to library staff or the binding agent about the type of binding material to use. This is an optional, 40-character field.

The **Color** box may contain instructions to library staff or the binding agent about the color of the binding and/or the color of the ink used on the binding cover. This is an optional, 40-character box.

The **Binding Title** box may contain instructions to library staff or the binding agent about the bound volume title. In cases where the complete title cannot fit on the spine or when titles are bound

using a title other than the title in the 245 field, you can use this field to specify the title to use for binding. This is an optional, 40-character field.

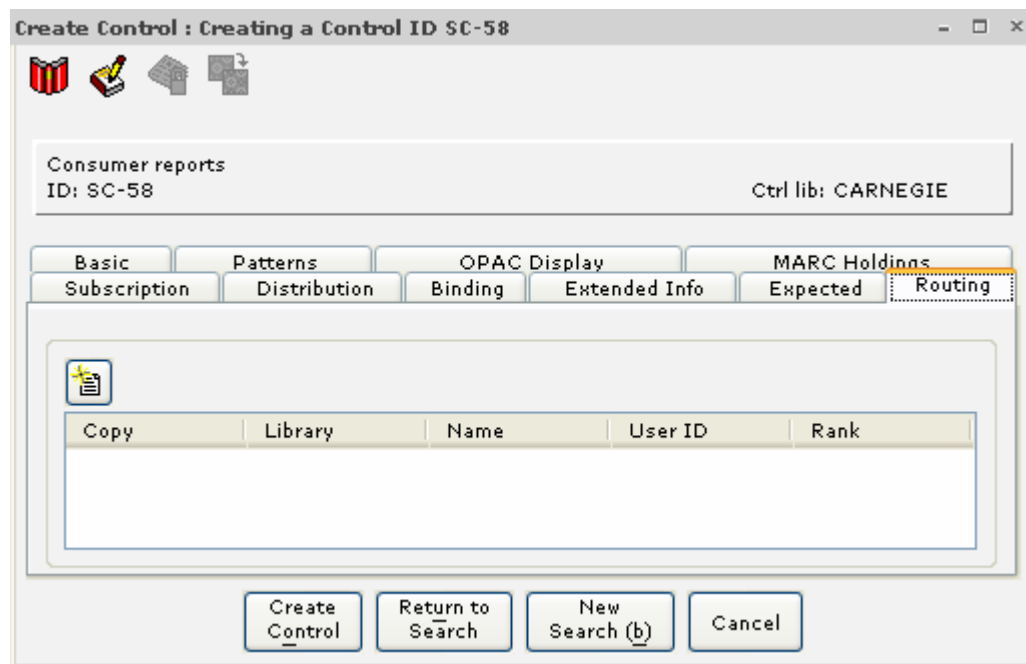
The **Date to Bind** box may contain the next date to collect issues for binding. After you collect the issues, be sure to change this date to the next collection date using the Modify a Serial Control wizard. The Serial Control Records report generates a list of materials to collect for binding based on the Date to Bind.

The **Date Sent to Bindery** box may contain the date you send the issues to the bindery.


Routing


If your library circulates issues to faculty or library staff before making it available to patrons, you can establish a routing list on this tab and then print it using the Reports Utility.

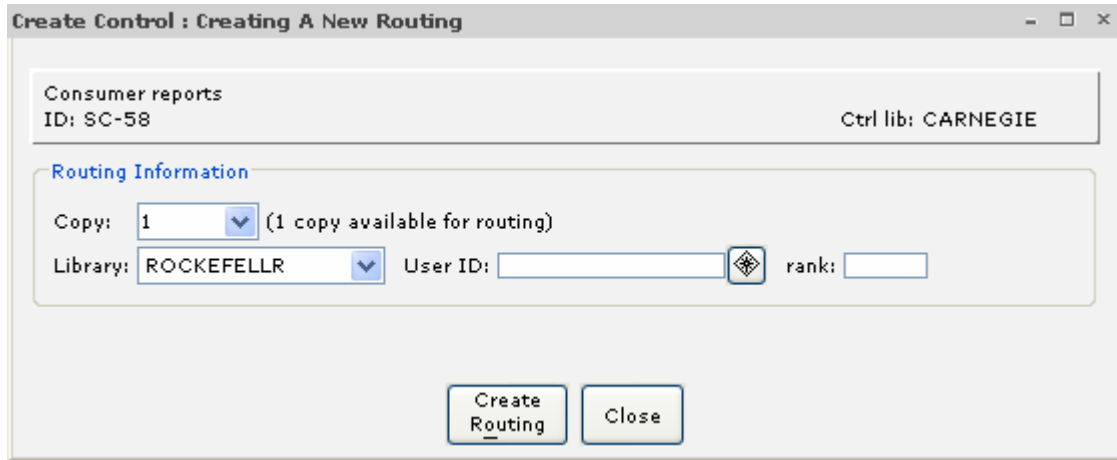
Note Be sure to enable the **Allow Routing** field in the user record or the user's name will not display in the routing list.



To create a routing list

1. On the Common Tasks toolbar, click the **Modify Control** wizard .
2. If the Set Properties window appears, verify the default settings and click **OK**. The Select Search window appears.
3. Search for the title you want to modify.
4. If more than one serial control record is associated with a title, a list appears on the List of Controls Found on Lookup window.

5. Select a title, and click **Modify Control** to display the serial control record for the selected title.
6. Click the **Routing** tab.
7. Click **Create a Routing** . The Creating a New Routing window appears:



The screenshot shows a window titled "Create Control : Creating A New Routing". At the top, it displays "Consumer reports ID: SC-58" and "Ctrl lib: CARNEGIE". Below this is a section titled "Routing Information". In this section, there is a "Copy:" dropdown menu set to "1" with the text "(1 copy available for routing)" to its right. Below the "Copy:" dropdown is a "Library:" dropdown menu set to "ROCKEFELLR". To the right of the "Library:" dropdown is a "User ID:" field with a selection icon (a diamond with a cross) to its right. To the right of the "User ID:" field is a "rank:" field. At the bottom of the window are two buttons: "Create Routing" and "Close".

8. In the **Copy** box, select the number of the copy that you want to route.
9. In the **Library** box, select the library to be routed from.
10. Click the **User ID** gadget to select the user that you want to add to the routing.
11. Type a number in the **Rank** box to establish the user's rank in the routing.
12. Click **Create Routing**. The Create Control window reappears with the new user name in the routing list.

When checking in serial issues, if the issue has routings, the routing lists will display beginning with the table of content routing (displayed as copy: 0) and ending with the routing for the last copy with a routing list. Each list displays separately and you will be prompted to print, or not print each one in order.

Reports and Claiming

Overview

A claim is a demand for a title, issues, or copies of an issue made by the library to the jobber or vendor responsible for a subscription.

A claim record contains the same information about an issue as a prediction record, such as enumeration, chronology, and number of copies expected.

A claim record also contains information about the dates and copies that have been or need to be claimed.

To claim an issue, a check-in record must exist for an issue that, for some specified claim reason, was not received by the library through the serial control receipt process.

Serial claims are created from check-in records.

Serial claim notices are generated through the Report Utility. (Electronic claiming may be done for EBSCO titles under serial control.)

Claim records may be created in a variety of ways:

- If a prediction record is for multiple copies, and all expected copies are not received, an Insufficient claim record is created automatically for the unreceived issues.
- If no copies are received by the Date to Claim, a Prediction as Late report may be run to create Issuelate claim records.

If serial staff notice that an issue was not received, or an issue is received but not accepted by the library for some other reason, (such as being damaged) a claim record may be created manually from the Claimed tab.

Reports

The serial group of reports assists in the maintenance of periodical publications that are received on a subscription or on some other regular basis. Serial reports accomplish the following tasks.

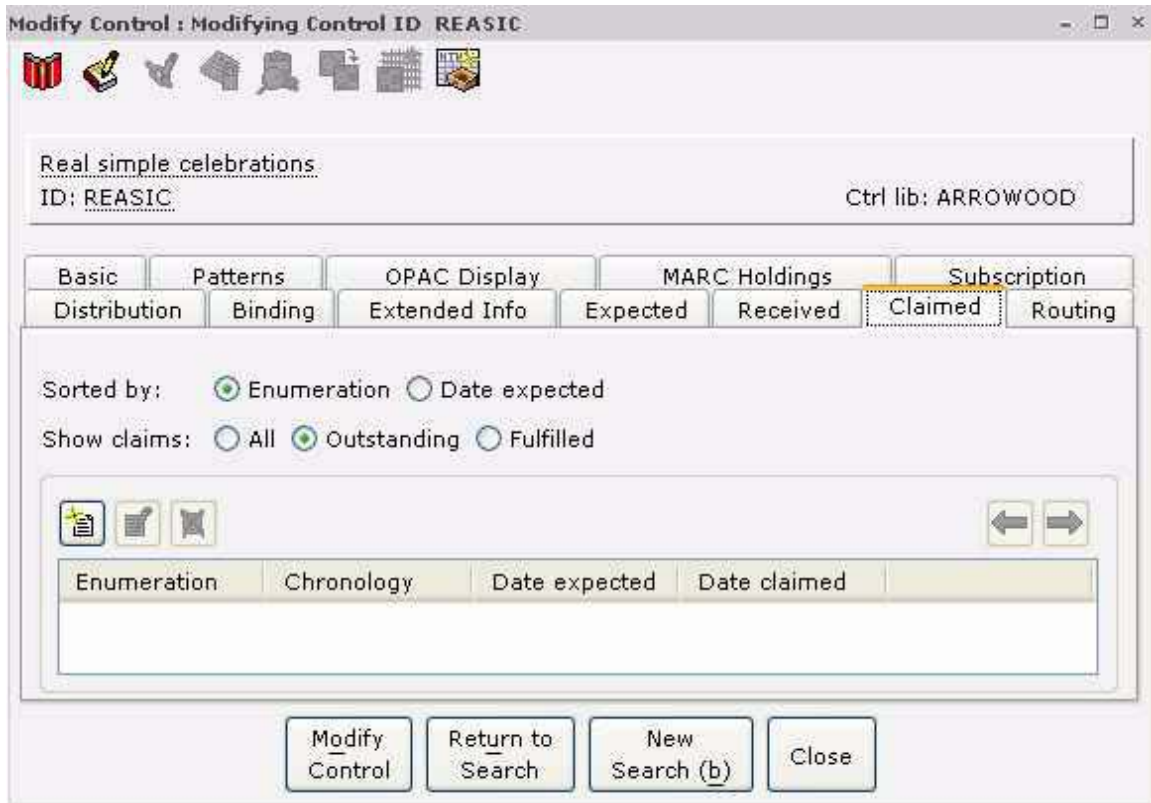
- Count and list information about predictions, control records, routings, and vendors.
- Manage the receipt and claiming of serial issues.
- Update MARC holdings from the serial control links.
- Provide tools to assist in the routing of periodical issues and tables of contents.

The following reports are available to be scheduled in the serial group of reports:

Calendar Conversion	Prediction MARC Holding Status
Count Serial Claims	Prediction as Late
Count Serial Control Records	Serial Claim Notices
Count Serial Control Routings	Serial Control Holding Flag
Count Serial Distributions	Serial Control Records
Count Serial Predictions	Serial Control Routing Slips
Count Serial Receipts	Serial Control Routings
Count Table of Contents Copies	Serial Controls by Item
Count Vendors	Serials X12 Invoices
Create Serial Distributions	Serials X12 Orders
Delete Serials Claims	Set Expected Issue
List Serial Predictions	Table of Contents Labels
List Vendors	Vendor Address Labels
New Routing Slips	X12 Serial Claim Transactions

Claimed Tab



The Claimed tab in the serial control record displays issues that have been claimed. The Report Utility described on the following pages generates serial claim notices. Even if check-in records were not generated by the prediction patterns (enumeration, name, and calendar) in the control record, a check-in record can still be created to represent an issue to be claimed.



Manual Claiming

You can manually create claims. This is particularly important when you need to claim damaged issues.

To place a manual claim

1. On the Common Tasks toolbar, click the **Modify Control** wizard  to search for the serial control record.
2. If the Set Properties window appears, verify the default settings and click **OK**. The Select Search window appears.
3. Search for the title you want to modify.
4. If more than one serial control record is associated with a title, a list appears on the List of Controls Found on Lookup window.
5. Select a title, and click **Modify Control** to display the serial control record for the selected title.
6. From the Claimed tab, click **Create a Claim** . The Select a Predicted Issue window lists expected issues:

Modify Control : Select A Predicted Issue

Consumer reports
ID: SC-100

Ctrl lib: ROCKEFELLR

Expect...	Enumeration	Chronology	Date expected	Receipt status
Y	V. 1 NO. 1	AUG 7, 2006	8/7/2006	none rcvd
	V. 1 NO. 2	AUG 8, 2006	8/8/2006	none rcvd
	V. 1 NO. 3	AUG 15, 2006	8/15/2006	none rcvd
	V. 1 NO. 4	AUG 22, 2006	8/22/2006	none rcvd
	V. 1 NO. 5	AUG 29, 2006	8/29/2006	none rcvd
	V. 1 NO. 6	SEP 5, 2006	9/5/2006	none rcvd
	V. 1 NO. 7	SEP 12, 2006	9/12/2006	none rcvd
	V. 1 NO. 8	SEP 19, 2006	9/19/2006	none rcvd

Create Claim (o) Close

7. Select the appropriate issue and click **Create Claim**. The prediction record appears with the option to choose a **Claim Reason**. The claim reason is a required entry.

Modify Control : Creating A Claim

Consumer reports
ID: SC-100 Ctrl lib: ROCKEFELLR

Claim Information

Enumeration: V. 1 NO. 1
Chronology: AUG 7, 2006

Date expected: 8/7/2006 Number expected: 1
Date prediction: 8/7/2006 Date to claim: 8/22/2006
Date claimed: TODAY Claim reason: DAMAGED
Copies claimed: 1 Times claimed: 0
Response date: Response code:
Nxt claim date:

Claim comment:
Response cmnt:

8. The next time the Serial Claim Notices Report runs, this claim will be selected and reported to the vendor. However, if you notify the vendor immediately after creating the claim, increment the **Times Claimed** box and update the **Nxt Claim Date** box. Normally the Serial Claim Notices Report updates these fields when a claim is reported to the vendor. Manually updating these fields prevents the claim from appearing on the next report. If the claim is not resolved by the next claim date, the claim will be chosen by the Serial Claim Notices Report.
9. After updating the prediction record with claim information, click **Modify Issue**. The list of expected issues remains on the window in case you need to issue more claims. If not, click **Close**. The Claimed tab reappears with the claim listed.
10. Click **Close** to exit the record.

Claiming with Reports

The following reports are used most regularly to maintain claim records.

- Prediction As Late Report
- Serial Claim Notices Report

Prediction As Late Report

The Prediction As Late report lets you define basic titling information, and make selections based on serial control record and prediction record criteria.

The Prediction As Late report marks serials as late based on the prediction record's Date to Claim box. When an entire issue is missed (no copies received at all), the claim record needs to be created with a claim reason of Issuelate before claim notice generation can take place. This report automatically creates claim records for issues with the Claim Reason box policy for late issues, so that claim notices can be generated. The Prediction As Late report should be scheduled to run on a regular basis to update prediction records that meet your library's criteria for claiming.

Note	The Prediction As Late report should always be run before you generate claim notices with either the Serial Claim Notices report or the X12 Serial Claim Transactions report.
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The Prediction As Late report automatically selects issue predictions that have received no copies and that do not already have a claim reason assigned. By default, the report also selects existing claims with a date to claim before the report run date. When the report runs, it looks at the claim reason policy, finds the first claim reason with type Late, and puts that policy name in the Claim Reason box of the claim record. With delivered policies, the claim reason is Issuelate.

Note	The results of this report are embedded in the report log. Do not select to view, print, or e-mail results only, or the system will return an error message.
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Serial Claim Notices

The Serial Claim Notices report allows you to define the basic titling information, and to make selections base on vendor, prediction, and claim record criteria.

Note Before running this report, the Prediction As Late report should be run to prepare issues for selection. After the staff reviews the list and makes any necessary modifications to the list of late predictions, the Serial Claim Notices report may be run.

An issue is not actually claimed in SirsiDynix Symphony 3.2 until claim notices are generated through the X12 Serial Claim Transactions report or the Serial Claim Notices report with the updating options set to **Yes**. The Serial Claim Notices Report generates standard paper letters and claims for serials in order by vendor. Run the X12 Serial Claim Transactions to generate claims in EDI claim format for X12 capable vendors.

The Serial Claim Notices report allows you to identify issues from particular vendor, or using characteristics in the prediction or claim records such as date expected or number of times claimed. The report creates letters to vendors that claim issues using a specific claim reason text, which can be created or modified, by our library. Each time the report runs with the Count as Notice Sent box in the output options set to **Yes**, the selected issues' Date Claimed and Times Claimed fields are updated.

Centralized Check-in Procedures

Overview

- SirsiDynix Symphony 3.2 allows multi-library systems to centralize serial control record maintenance and check-in procedures.
- Multi-library systems implement this when a branch or headquarters manages serial subscriptions centrally. After issues are received and checked-in, they are sent to the appropriate branches.
- The Subscription and Distribution tabs in the serial control record work together to define the number of copies and distribution of those copies.
- The Check In wizard easily allows you to receive all or partial shipments of serial issues.
- Because the serial control record in this context has been built to process issues for multiple branches, it can also easily update the OPAC for each of the branches. One control record can create and update a 599, volume holdings, and MARC holdings for each branch represented in the control record.
- Holding code policies representing libraries, serial item types, and locations will be necessary in order to correctly update the OPAC for each branch that will add serial issues to the collection.

Creating a Serial Control Record

The library that “owns” the serial control record is typically the library that receives the issues for the branches.

This library ownership is established when creating the serial control record. This ownership is determined as a beginning step of creating a serial control record.

Library For New Serial Control

Library:

Holding code:

OK Cancel

Other settings in the control record allow you to clarify the branches for which serial issues are received.

Consumer reports
ID: SC-15

The Ctrl lib field displays the library that maintains ownership of the serial subscription.

Ctrl lib: ARROWOOD

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

New control ID: Status:

SISAC ID: Category1:

Vendor title#: Category2:

Base call number:

Class scheme: Date created: 7/25/2005

Subscription ID:

Create Control Return to Search New Search Cancel

Subscription Tab

In the Subscription tab you will record the total number of copies you expect to receive for all library branches.

Consumer reports
ID: SC-15 Ctrl lib: ARROWOOD

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

Copies/Issues

Copies to receive: 4
Number of issues: 12
Expiration date: NEVER

*In this example, four copies of **Consumer Reports** will be distributed to the library branches.*

Link for ordering/claiming

Fiscal cycle: [] Library: ARROWOOD
Vendor ID: []
Order ID: [] Line item #: []

Order History ...

Create Control Return to Search New Search Cancel

Distribution Tab

The Distribution tab contains distribution records that represent the libraries that receive issues from the subscription as well as options for OPAC update.

Typically, one distribution record is created for each library that will receive issues from the subscription.

Consumer reports
ID: SC-15 Ctrl lib: ARROWOOD

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

Holding code	Copies expected	Copies to add to catalog	Update holdings
ARROW_SER	2	2	Y
CAFFEY_SER	1	1	Y
MOYERS_SER	1	1	Y

Create Control Return to Search New Search Cancel

Each distribution record contains a holding code that represents the library that will receive issues from the subscription. The holding code also defines library, location and serial item types that are used when OPAC update options are enabled (like creating copies at the time of check-in or creating/updating MARC holdings).

Time
ID: SC-101

Ctrl lib: ROCKEFELLR

Receiving 1 copies
ALL copies distributed

Distribution Information

Holding code: ROC_PERIOD Update MARC holdings records

Copies expected: 2 Copies to add to catalog: 2

Modify Distribution Close

SirsiDynix Symphony 3.2 gauges the number of copies specified in the Subscription tab and will provide messages if not all copies are distributed.

Extended Info Tab

The Extended Info tab can be used to display check-in notes when receiving issues with the Check In wizard. Notes can be added to remind staff where issues should be distributed after they are received.

The screenshot shows a software window titled "Create Control : Creating a Control ID SC-101". At the top, there are icons for a book, a pencil, and a refresh symbol. Below the icons, the "Time ID: SC-101" is displayed on the left and "Ctrl lib: ROCKEFELLR" on the right. A tabbed interface is present with the following tabs: "Basic", "Patterns", "OPAC Display", "MARC Holdings", "Subscription", "Distribution", "Binding", "Extended Info", "Expected", and "Routing". The "Extended Info" tab is currently selected and highlighted. Inside this tab, there are three icons for adding, editing, and deleting notes. Below these icons is a list of three notes:

NOTE	Received 2 copies for Rockerfellr - shelve after receipt
NOTE	Received 1 copy for CAffey - transit to Caffey
NAME	Received 1 copy for Moyers - transit to Moyers

At the bottom of the window, there are four buttons: "Create Control", "Return to Search", "New Search (b)", and "Cancel".

Check-in Serial Issues

The steps for receiving issues are not different than receiving issues in a non-centralized environment. After completing the steps for receiving issues, the Check In wizard presents a confirmation that also indicates where issues should be distributed.

Check In : Issue Received

Consumer reports
 ID: CONSUMERRPTS Ctrl lib: ARROWOOD

Basic info
 Enumeration: V. 70 NO. 7
 Chronology: JUL 2005
 Copies received: 4

Item created

Distribute Copies Received

Holding code »	Copies received	Holdings	Copies added	Routing lists
ARROW_SER	2	Created	2	0
CAFFEY_SER	1	Created	1	0
MOYERS_SER	1	Created	1	0

Copies were received for each holding code.

The holdings were created and copies were added for each holding code.

Next Issue (o) New Search Close

OPAC Display

The multiple distributions will display in the online catalog as follows:

Item Information
Catalog Record

Consumer reports
Consumers Union of United States.

Publisher: Consumers Union of United States,
Pub date: c1942-
Pages: v. :
Copy info: 32 copies available at E. A. Arrowood Foundation Library, Patrick Caffey Public Library, and Tracy Moyers Pre-Memorial Library. 32 copies total in all locations.

ARROWOOD
Location: STACKS--
Holdings: v.70:no.1 (2005:Jan.) - v.70:no.8 (2005:Aug.)

CAFFEY
Location: STACKS--
Holdings: v.70:no.1 (2005:Jan.) - v.70:no.8 (2005:Aug.)

MOYERS
Location: STACKS--
Holdings: v.70:no.1 (2005:Jan.) - v.70:no.8 (2005:Aug.)

Holdings

E. A. Arrowood Foundation Library	Copies	Material	Location
TX335 .A1 C6 V. 70 NO. 8 AUG 2005	2	Magazine	Standard shelving location
TX335 .A1 C6 V. 70 NO. 7 JUL 2005	2	Magazine	Standard shelving location
TX335 .A1 C6 V. 70 NO. 6 JUN 2005	2	Magazine	Standard shelving location
TX335 .A1 C6 V. 70 NO. 5 MAY 2005	2	Magazine	Standard shelving location
TX335 .A1 C6 V. 70 NO. 4 APR 2005	2	Magazine	Standard shelving location
TX335 .A1 C6 V. 70 NO. 3 MAR 2005	2	Magazine	Standard shelving location
TX335 .A1 C6 V. 70 NO. 2 FEB 2005	2	Magazine	Standard shelving location
TX335 .A1 C6 V. 70 NO. 1 JAN 2005	2	Magazine	Standard shelving location

Patrick Caffey Public Library	Copies	Material	Location
TX335 .A1 C6 V. 70 NO. 8 AUG 2005	1	Magazine	Standard shelving location
TX335 .A1 C6 V. 70 NO. 7 JUL 2005	1	Magazine	Standard shelving location
TX335 .A1 C6 V. 70 NO. 6 JUN 2005	1	Magazine	Standard shelving location
TX335 .A1 C6 V. 70 NO. 5 MAY 2005	1	Magazine	Standard shelving location
TX335 .A1 C6 V. 70 NO. 4 APR 2005	1	Magazine	Standard shelving location
TX335 .A1 C6 V. 70 NO. 3 MAR 2005	1	Magazine	Standard shelving location
TX335 .A1 C6 V. 70 NO. 2 FEB 2005	1	Magazine	Standard shelving location
TX335 .A1 C6 V. 70 NO. 1 JAN 2005	1	Magazine	Standard shelving location

Tracy Moyers Pre-Memorial Library	Copies	Material	Location
TX335 .A1 C6 V. 70 NO. 8 AUG 2005	1	Magazine	Standard shelving location
TX335 .A1 C6 V. 70 NO. 7 JUL 2005	1	Magazine	Standard shelving location
TX335 .A1 C6 V. 70 NO. 6 JUN 2005	1	Magazine	Standard shelving location
TX335 .A1 C6 V. 70 NO. 5 MAY 2005	1	Magazine	Standard shelving location
TX335 .A1 C6 V. 70 NO. 4 APR 2005	1	Magazine	Standard shelving location
TX335 .A1 C6 V. 70 NO. 3 MAR 2005	1	Magazine	Standard shelving location
TX335 .A1 C6 V. 70 NO. 2 FEB 2005	1	Magazine	Standard shelving location
TX335 .A1 C6 V. 70 NO. 1 JAN 2005	1	Magazine	Standard shelving location

MARC holdings display for each library distribution.

Individual copy holdings display for each library distribution.

Receiving Partial Shipments

The Check In wizard will automatically create claim records for issues not received when a partial shipment arrives in the library.

Library preference determines how distribution of the received issues should be handled.

Auto-distribution Partial Shipments

SirsiDynix Symphony 3.2 can auto-distribute received issues. SirsiDynix Symphony 3.2 will distribute copies across the distribution records in the Distribution tab starting with the first one in the list. Claim records are created for distribution records that were not fully received.

Manual Distribution Partial Shipments

Staff can determine where issues should be distributed. A Behavior property of the Check In wizard determines whether this manual distribution can occur.

Check In : Update Distribution List

Consumer reports
ID: CONSUMERRPTS Ctrl lib: ARROWOOD

Basic info
Enumeration: V. 70 NO. 8
Chronology: AUG 2005
Copies received: 2

Issue received.


Distribute Copies Received

Holding code	Copies received	Holdings	Copies added	Routing lists
ARROW_SER	1	<input checked="" type="checkbox"/>	1	
CAFFEY_SER	1	<input checked="" type="checkbox"/>	1	
MOYERS_SER	0	<input type="checkbox"/>	0	

Only two copies were received instead of the expected four.


The staff decides how to distribute the copies to each holding code.


To create a control record with multiple distributions

1. On the Common Tasks toolbar, click the **Create Control** wizard .
 2. If the Set Properties window appears, verify the default settings and click **OK**. The Select Search window appears.
 3. Search for the title you want to create a control record.
 4. Verify that this is the correct title, and click **Create Control** to create a new serial control record.
 5. In the **Library** box, select a library that will receive the issues.
 6. In the **Holding Code** box, select an appropriate code established by your library.
 7. Click **OK**. The Select a Pattern Template window may appear.
 8. Click the publication frequency template for this title from the left column and click **OK**. The Creating Control ID window appears.
 9. Click the **Subscription** tab.
 10. Type **2** for the number of copies to receive. You must save the record before changing the distribution.
 11. Click **Create Control**. The Get Expected Issue Info window appears.
 - a. Type the number of expected issues to preview.
 - b. Type the number of the volume and number of the issue in the **V.** and **NO.** boxes.
 - c. Type the **Chronology**.
 - d. Type or use the date gadgets to enter a **Date First Prediction** and **Date Expected**.
 - e. Click **Generate Predictions**. The Prediction Records appear.
 - If satisfactory, click **Save Predictions**. Click **OK** to confirm.
 - If not satisfactory, click **Redo Predictions**. Repeat steps a-e.

-Or-

Click **Close** to return to the record and generate predictions later.

12. Click **OK** to confirm that the record was created and return to the control record's Basic tab.
13. Click the **Distribution** tab.
14. Click the **Modify a Distribution** tool . The Modify a Serial Distribution window appears.
15. Select a new holding code.
16. Type **1** for the number of copies to expect.
17. Type **1** for the number of copies to add to the catalog.
18. Select the **Update MARC Holdings Records**.
19. Click **Modify Distribution**. The Creating a Serial Distribution window appears:



Real simple organized home
ID: REASIOH Ctrl lib: ARROWOOD

Receiving	2	copies
	1	copies distributed
	1	copies not distributed

Distribution Information

Holding code: Update MARC holdings records

Copies expected: Copies to add to catalog:

Holding code	Copies expected	Copies to add to cata...	Update holdings
SERIALS	1	1	Y

Create Distribution Close

20. Enter a **Holding code**, number of **Copies expected**, and number of **Copies to add to catalog** for this distribution.
21. Click **Create Distribution** to return to the Distribution tab.

Note If there were copies still unassigned to a distribution, the Creating a Serial Distribution window would remain open after you click **Create Distribution** to allow you to continue assigning copies. Once the last copy was assigned, it would return to the Distribution tab after clicking **Create Distribution**.

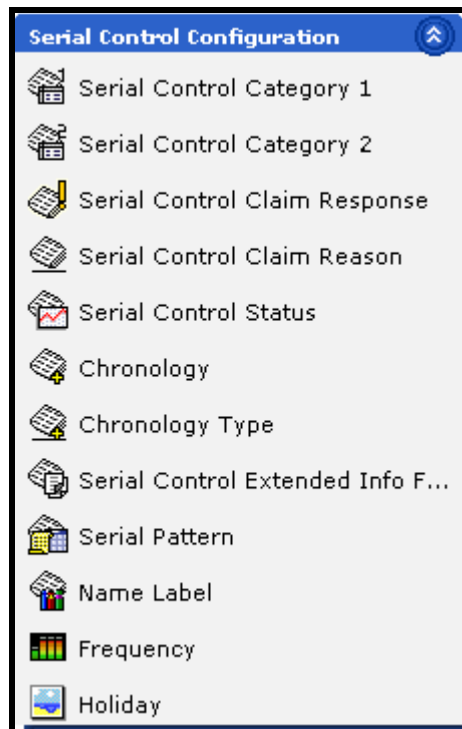
22. Click **Modify Control**.
23. Click **Close** to exit the wizard.

Serials Configuration Policies

Serial Control Configuration policies are used to gather statistics about serial control records, tracking claims and claim responses, and defining chronology names and chronology lists.







To access these policies


1. Click the **Configuration** toolbar tab.
2. Select the **Serial Control Configuration** toolbar.



Serial Control Configuration Policies






The Serial Control Configuration Policy group includes the following policies:

	Serial Control Category 1	The purpose of this optional category policy is to denote a control record's special characteristics for serial control statistical analysis. The library determines the general purpose of this box, which policy names are allowed, and define the screen label for this policy through screen configuration files. Serial control categories are used as selection criteria in reports for generating detailed statistical breakdowns by library-defined characteristics.
	Serial Control Category 2	Like Category 1, the purpose of this optional category policy is to denote another of the control record's special characteristics for serial control statistical analysis.
	Serial Control Claim Response	The Serial Control Claim Response policy is used to standardize terminology used in responses from various serial vendors.
	Serial Control Claim Reason	The Serial Control Claim Reason policy is used in check-in records to describe why a serial issue is being claimed. Each Claim Reason policy defines a name, a type, a numeric code, and a line of text to be inserted in the claim notice text. There are four types of claim reasons: DONT (Do not claim), INSF (Insufficient Copies Received), LATE (Late Issue), and NORMAL.
	Serial Control Status	The Serial Control Status Policy is used to establish a controlled vocabulary to describe the current status of a serial control record for statistical analysis. Status is used as selection criteria in reports for generating detailed statistical breakdowns by library-defined characteristics.
	Chronology	The Chronology policy provides the chronology designations, such as the month or season, for each issue.

	Chronology Type	The Chronology Type policy defines the set of chronology names that issues will have when predictions are automatically generated. This policy usually contains a list of Chronology policies. This list can contain up to 15 elements, with each element containing one to four Chronology policies. When predictions are generated, this list is referenced, and each subsequent prediction is assigned a name from the list, plus a year. When the last name in the list is reached, the year is increased by one, and the first name in the list is referenced again. This policy displays in the Patterns tab of a serial control record.
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CAUTION: The Chronology and Chronology Type policies are used to calculate chronology statements in prediction records. Do not remove or modify the standard delivered policies without consulting SirsiDynix Client Care.

	Extended Info	The Extended Info Policy defines the serial control extended information format.
	Serial Pattern	The Serial Pattern policy is used to define common enumeration, chronology, and publication patterns that will be used for many serials.
	Name Label	The Name Label Policy provides enumeration captions for the labeling of individual serial issues.
	Frequency	The Frequency Policy is used to specify the serial publication frequency and is matched to the FREQU fixed field in the bibliographic record.
	Holiday	The Holiday Policy contains a specific date and can be used to in an omit cycle definition to manage dates on which an issue of a serial will not be published.

Chronology Policies

Name	Description	Code	Holdings Display
JAN	January	01	Jan.
FEB	February	02	Feb.
MAR	March	03	Mar.
APR	April	04	Apr.
MAY	May	05	May
JUN	June	06	June
JUL	July	07	July
AUG	August	08	August
SEP	September	09	September
OCT	October	10	October
NOV	November	11	November
DEC	December	12	December
SPR	Spring	21	Spring
SUM	Summer	22	Summer
FALL	Fall	23	Fall
WIN	Winter	24	Winter

Chronology Type Policies

Name	Description	Special Processing	Name List	Caption
BIMONTH	Bimonthly-Jan/Feb	None	JAN/FEB MAR/APR MAY/JUN JUL/AUG SEP/OCT NOV DEC	(month)
BIMONTH2	Bimonthly- Dec/Jan, Feb/Mar	None	DEC/JAN FEB/MAR APR/MAY	(month)
DATE	Date (MMM [^] /DD/ [^] YY YY)Jan 2, 2006	Date	JAN FEB MAR APR MAY JUN JUL	There is no caption
MONTH	Monthly	Month	JAN FEB MAR APR MAY JUN JUL	There is no caption
NUMERATION	Enumeration	Numeration	There is no name list	There is no caption
SEASON	Season- Win, Spr...	None	WIN SPR SUM FALL	(season)
SEASON2	Season- Spr, Sum...	None	SPR SUM FALL WIN	(season)
SEASON3	Season- Jan/Mar, Apr/Jun	None	JAN/MAR APR/JUN JUL/SEP OCT/DEC	(month)
YEAR	Year (YYYY) 2006	Year	There is no name list	There is no caption
CUSTOM	Custom chronology	Text	There is no name list	There is no caption

Serials Frequency Policies

Name	Description	Code
3INMONTH	Three times a month	j
3INWEEK	Three times a week	i
3INYEAR	Three times a year	t
ANNUAL	Annual	a
BIENNIAL	Every 2 years	g
BIMONTHLY	Every 2 months	b
BIWEEKLY	Every 2 weeks	e
DAILY	Daily	d
IRREGULAR	Completely irregular	x
MONTHLY	Monthly	m
QUARTERLY	Quarterly	q
SEMIANNUAL	Twice a year	f
SEMIMONTH	Twice a month	s
SEMIWEEKLY	Twice a week	c
TRIENNIAL	Every three years	h
UNKNOWN	Frequency unknown	u
WEEKLY	Weekly	w

Serials Holiday Policies

Name	Description	Date
New Year	New Year	1 st day of January
Memorial Day	Memorial Day	Last Monday of May
Thanksgiving	Thanksgiving	Fourth Thursday of November
Christmas	Christmas	25 th day of December

Serials Label Policies

Name	Description
V.	Volume
NO.	Number
PT.	Part

Serials Pattern Configuration Policies

The Serial Pattern policies are used to relate standard serial frequencies to MARC values, and to define default enumeration, chronology, and publication cycles in control records.

Daily

Name	DAILY
Description	Daily
Frequency code	DAILY

SubDivision	Label	Limit	Numeric
Level 1	V.		
Level	NO.	365	Y
Name Type	Date		
Publication cycle	Every day		
Days to claim	4		
Days to subsequent claim	30		
Number of issues	365		

Weekly

Name	WEEKLY
Description	Weekly
Frequency code	WEEKLY

SubDivision	Label	Limit	Numeric
Level 1	V.		
Level	NO.	52	Y
Name Type	Date		
Publication Cycle	Every week on Monday		
Days to claim	10		
Days to subsequent claim	30		
Number of issues	52		

Monthly

Name	MONTHLY
Description	Monthly
Frequency code	MONTHLY

SubDivision	Label	Limit	Numeric
Level 1	V.		
Level	NO.	12	Y
Name Type	MONTH		
Publication Cycle	Every month on 1 st day		
Days to claim	15		
Days to subsequent claim	90		
Number of issues	12		

Annual

Name	ANNUAL
Description	Annual
Frequency code	ANNUAL

SubDivision	Label	Limit	Numeric
Level 1	V.		
Level			
Name Type	YEAR		
Publication cycle	Every year on Jan. 2nd		
Days to claim	60		
Days to subsequent claim	90		
Number of issues	1		

Biweekly

Name	BIWEEKLY
Description	Every 2 weeks
Frequency code	BIWEEKLY

SubDivision	Label	Limit	Numeric
Level 1	V.		
Level	NO.	26	Y
Name Type	Date		
Publication Cycle	Every two weeks on the first day		
Days to claim	10		
Days to subsequent claim	90		
Number of issues	26		

Bimonthly

Name	BIMONTHLY
Description	Every 2 months
Frequency code	BIMONTHLY

SubDivision	Label	Limit	Numeric
Level 1	V.		
Level 2	NO.	6	Y
Name Type	Month		
Publication cycle	Every two months on the first day of the month		
Days to claim	17		
Days to subsequent claim	90		
Number of issues	6		

Biennial

Name	BIENNIAL
Description	Every 2 years
Frequency code	BIENNIAL

SubDivision	Label	Limit	Numeric
Level 1	V.		
Level			
Name Type	YEAR		
Publication Cycle	Every two years on January 2		
Days to claim	60		
Days to subsequent claim	90		
Number of issues	1		

Three Issues Per Month

Name	3INMONTH
Description	Three issues per month
Frequency code	3INMONTH

SubDivision	Label	Limit	Numeric
Level 1	V.		
Level	NO.	36	Y
Name Type	Date		
Publication Cycle	Every month on the 1st, 15th, and 28th		
Days to claim	10		
Days to subsequent claim	90		
Number of issues	36		

Three Issues Per Week

Name	3INWEEK
Description	Three issues per week
Frequency code	3INWEEK

SubDivision	Label	Limit	Numeric
Level 1	V.		
Level	NO.	156	Y
Name Type	Date		
Publication cycle	Every month on Monday, Wednesday & Friday		
Days to claim	4		
Days to subsequent claim	90		
Number of issues	156		

Three Issues Per Year

Name	3INYEAR
Description	3 issues per year
Frequency code	3INYEAR

SubDivision	Label	Limit	Numeric
Level 1	V.		
Level	NO.	3	Y
Name Type	Month		
Publication Cycle	Every four months on the first day		
Days to claim	30		
Days to subsequent claim	90		
Number of issues	3		

Quarterly

Name	QUARTERLY
Description	Quarterly
Frequency code	QUARTERLY

SubDivision	Label	Limit	Numeric
Level 1	V.		
Level	NO.	4	Y
Name Type	MONTH		
Publication cycle	Every three months on the first day		
Days to claim	21		
Days to subsequent claim	90		
Number of issues	4		

Semiannual

Name	SEMIANNUAL
Description	Twice a year
Frequency code	SEMIANNUAL

SubDivision	Label	Limit	Numeric
Level 1	V.		
Level	NO.	2	Y
Name Type	MONTH		
Publication Cycle	Every six months on the first day		
Days to claim	45		
Days to subsequent claim	90		
Number of issues	2		

Semimonthly

Name	SEMIMONTH
Description	Two issues per month
Frequency code	SEMIMONTH

SubDivision	Label	Limit	Numeric
Level 1	V.		
Level	NO.	24	Y
Name Type	Date		
Publication cycle	Every month on the first and the fifteenth		
Days to claim	10		
Days to subsequent claim	90		
Number of issues	24		

Semiweekly

Name	SEMIWEEKLY
Description	Two issues per week
Frequency code	SEMIWEEKLY

SubDivision	Label	Limit	Numeric
Level 1	V.		
Level	NO.	104	Y
Name Type	Date		
Publication Cycle	Twice a week on Monday and Wednesday		
Days to claim	7		
Days to subsequent claim	90		
Number of issues	104		

Triennial

Name	TRIENNIAL
Description	Every three years
Frequency code	TRIENNIAL

SubDivision	Label	Limit	Numeric
Level 1	V.		
Level			
Name Type	YEAR		
Publication cycle	Every three years on January 2nd		
Days to claim	60		
Days to subsequent claim	90		
Number of issues	1		

Cataloging Configuration Policies

Classification Policy

The Classification policy controls the treatment of call numbers in SirsiDynix Symphony 3.2. Some attributes of the policy are used in calculating shelving keys; other attributes are used to format the display of the call number. In this policy, you will define the LCPER policy.

Holding Code Policy

The Holding Code policy is used when loading bibliographic records into SirsiDynix Symphony 3.2 via the record loading reports. A holding code in a bibliographic record is a short code that represents copy-level information, such as Item Type and Location. In SirsiDynix Symphony 3.2, the Holding Code policy is used to provide required copy-level information at the time the record is loaded. Each Holding Code policy definition provides several pieces of necessary information that is expanded into data when a bibliographic record is loaded into SirsiDynix Symphony 3.2.

Serial Control Properties

Check-in Wizard Properties

Defaults Tab

Folder Options

You can enable or disable any of the following folders to display during the check-in process.

- Show Control Information Folder
- Show MARC Holdings Folder (delivered disabled)
- Show Distributions Folder

Preferences for Working with Issues

You can enable or disable any of the following folders of issues to display during the check-in process.

- Show Expected Issues Folder
- Show Received Issues Folder
- Show Claims Folder

Number of issues per browse screen determines how many expected, received, or claimed issues will display at a time. The default value displays approximately the number that will fit per window. If the number of issues exceeds a window size, you may use the scroll bar to display up to this specified number. You may page forward and backward through the issues that are not displayed. However, only this number of issues displayed may be removed at one time and you cannot page forward through a list displayed for removal.

Combined Issues Options

You can enable the default issue enumeration and chronology combination patterns that will display when combining issues. These values may be modified manually or changed using the Modify Options helper if it is enabled to display. You can set one of the following three combined enumeration options as a default.

- Combine the enumerations of the first and last issues (default)
- Use the enumeration of the first issue
- Use the enumeration of the last issue

You can also set one of the following combined chronology options as default.

- Combine the chronologies of the first and last issue
- Use the chronology of the first issue
- Use the chronology of the last issue

Frequently Used Properties

Number of Issues Per Browse Screen

The **Number Of Issues Per Browse Screen** determines how many expected, received, or claimed issues will appear at a time. The default value displays approximately the number that will fit per window. If the number of issues exceeds a window size, you may use the scroll bar to display up to this specified number. You may page forward and backward through the issues that are not displayed using the Browse Forward or Browse Backward buttons. However, only this number of issues displayed may be removed at one time and you cannot page forward through a list displayed for removal.

Printing Functionality

Screen Printing

Printing is available for the Check In and Display Serial Control wizards through two options:

- The File menu
- The Print icon

If you select the File menu, a Print Preview appears displaying the arrangement of the information. You can select any printer that is available.

If you select the Print icon, the print job is immediately sent to the default printer. This is configured in Windows.

With both options, all the tabs of the control record are printed.

Print Routing Slips

Printing routing slips is connected to the Check In wizard.

The functions include:

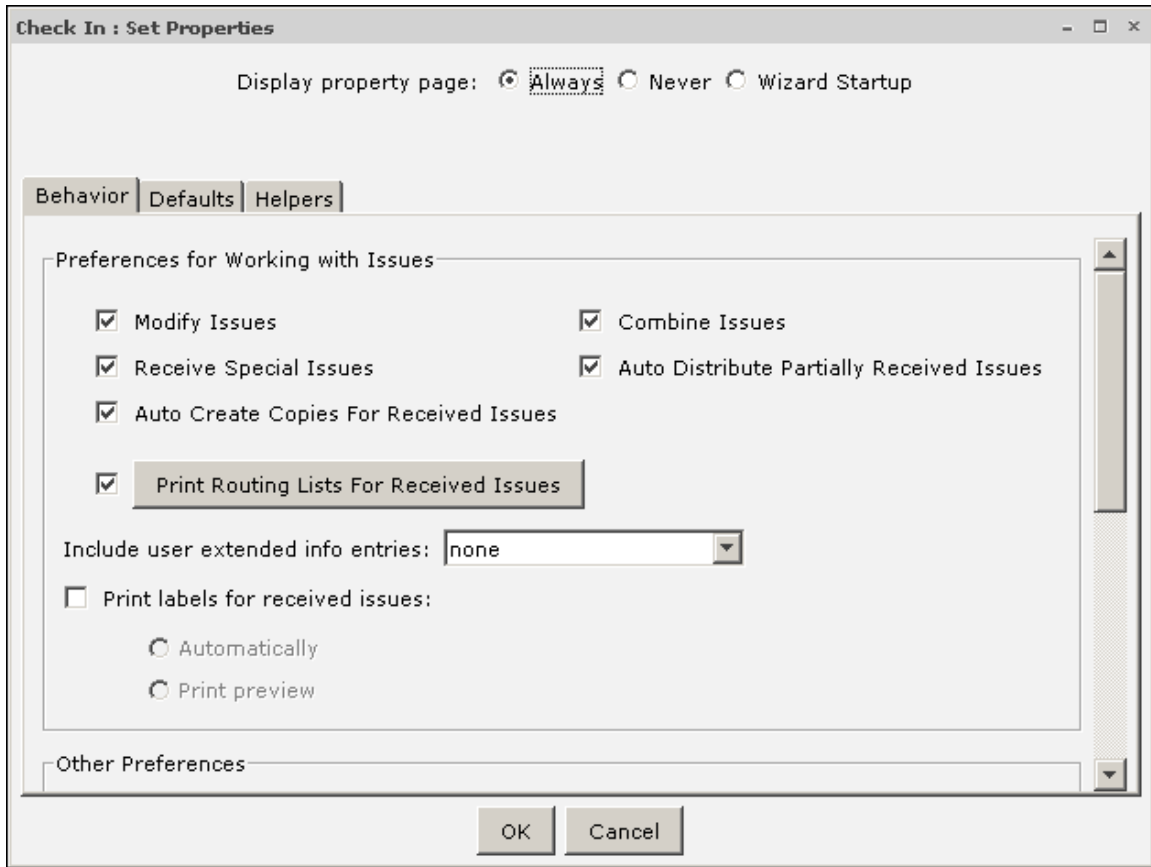
- Print the title's bibliographic information.
- Automatically print user names.
- Print user address information.
- Print extended information from user records.
- Automatically print the copy number associated with the routing slip.
- Specify a general preference about how the slips should be printed (attached receipt printer, or default printer).

General Properties

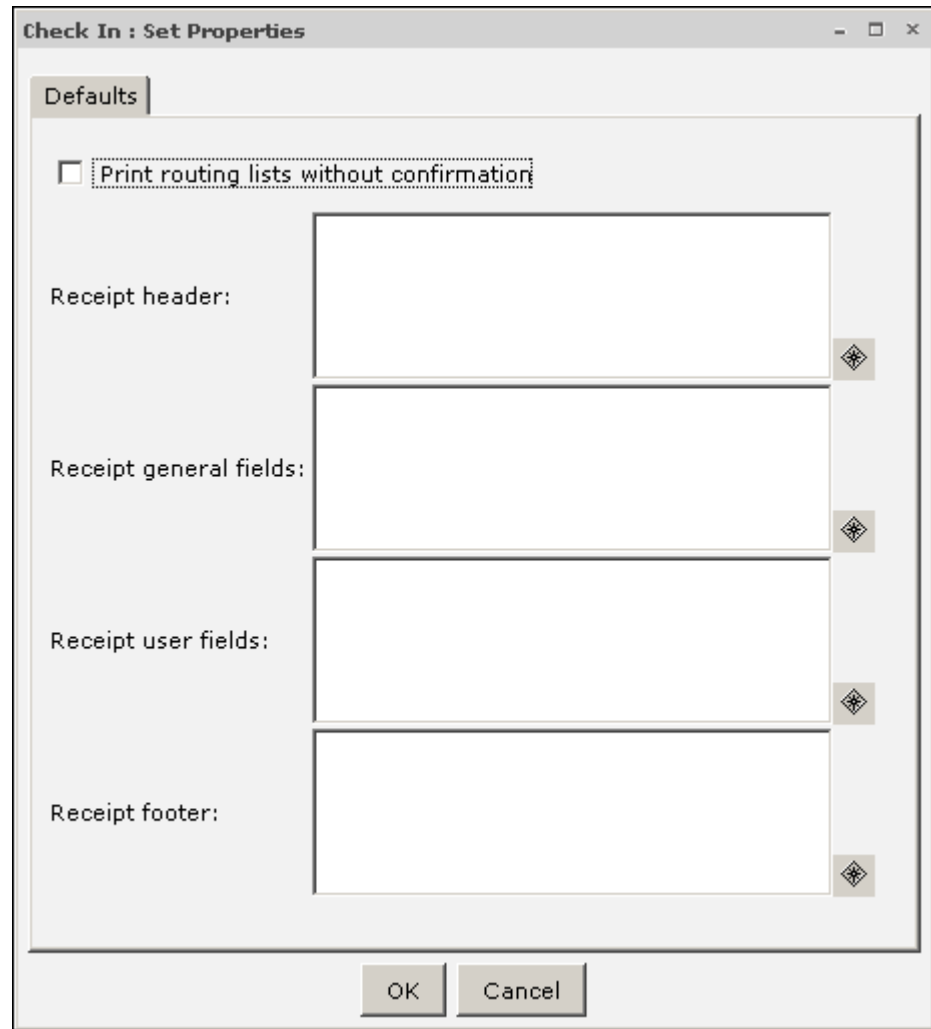
The Check In wizard contains properties that determine whether or not routing slips will print.

Print Routing Lists for Received Issues

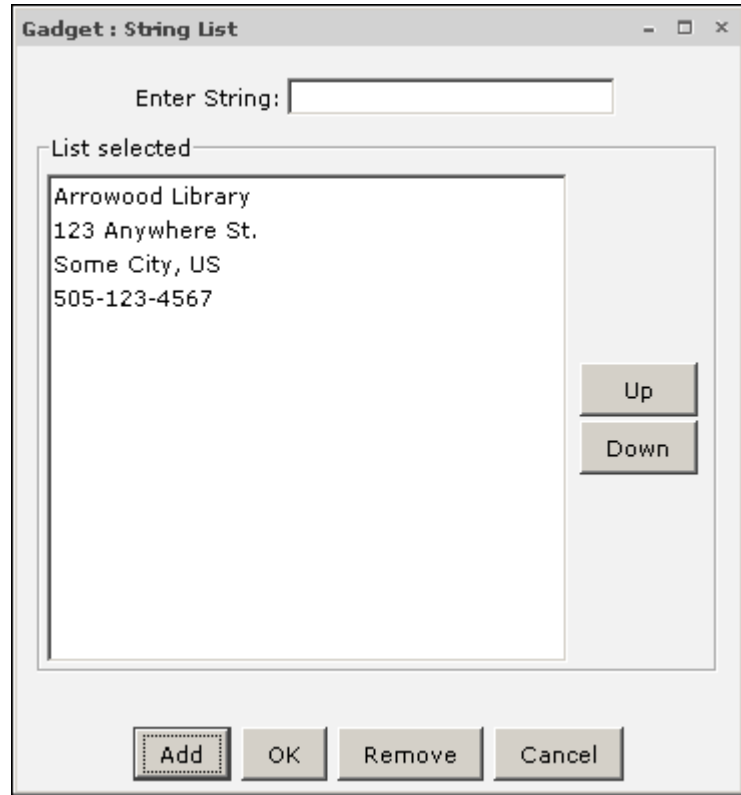
The Print Routing Lists for Received Issues option controls the routing slip functionality.



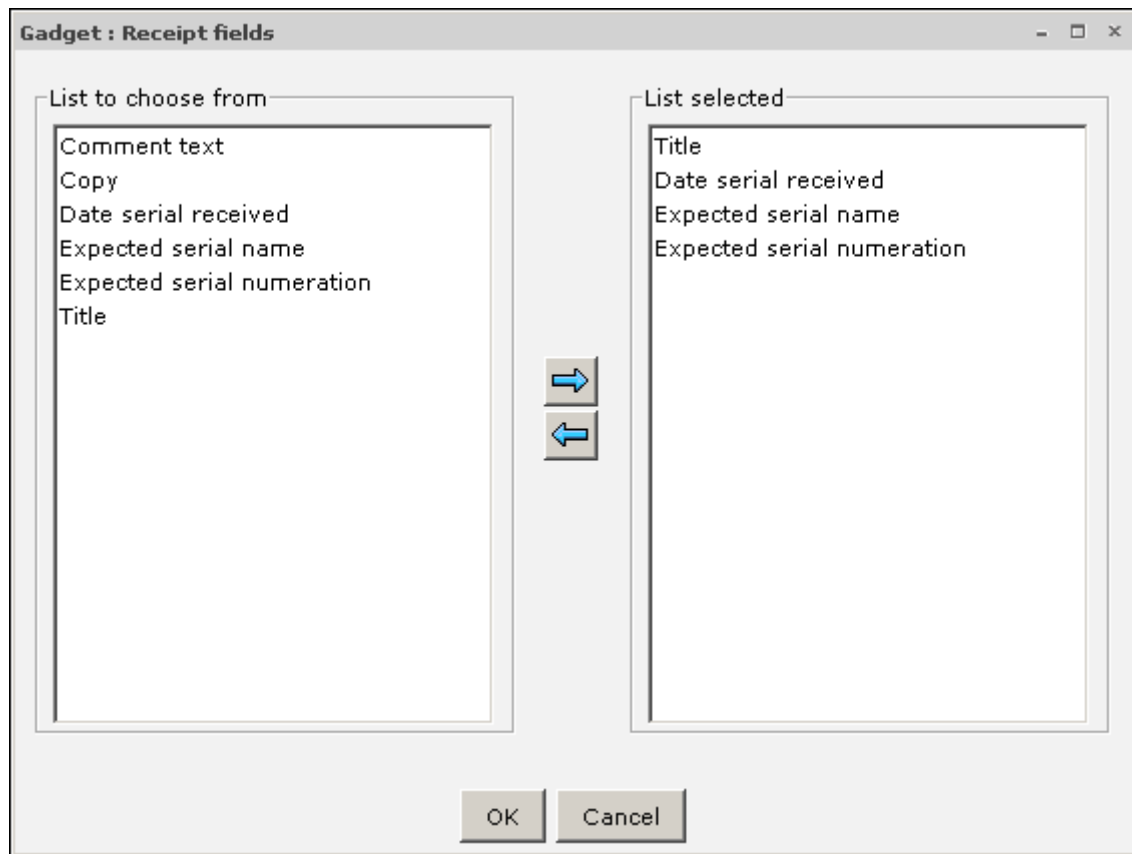
1. Select the check box next to **Print Routing Lists for Received Issues** to generate a routing slip during the check-in process. If the check box is not selected, a routing slip will not print.
2. Select a synonym list to use to **Include user extended info entries** on the routing slip.
3. Click **Print Routing Lists for Received Issues** to setup the receipt information. The Set Properties window appears:



4. Select the check box next to **Print routing lists without confirmation** to print the slips automatically. If this check box is not selected, a preview of each slip appears during the check-in process.
5. Click the **Receipt header** gadget. The string list gadget appears.
6. Type header text in the **Enter string** box and click **Add**.
 - Multiple lines can be entered, up to 30 characters each.
 - Highlight the line to change the order using the **Up** and **Down** buttons. Or, click **Remove** to delete the line.

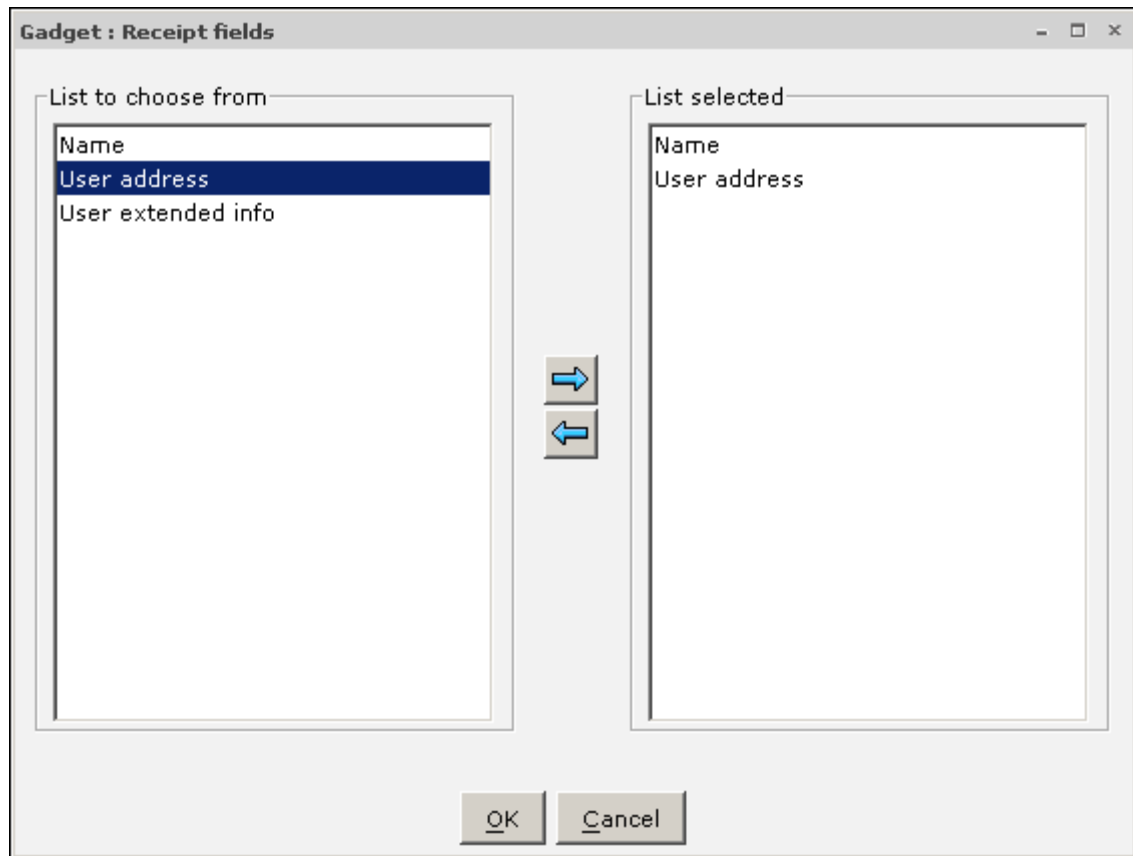


7. Click **OK** when finished to return to the Set Properties window.
8. Click the **Receipt general fields** gadget. The Receipt Fields gadget appears.
9. Highlight the text to print on the routing slip in the **List to choose from** column and click the right arrow to move to the **List selected** column:
 - **Comment text** – Comments from the prediction record.
 - **Copy** – The copy number of the routing list, which is established in the control record.
 - **Date serial received** – Based on the date the issue is checked in.
 - **Expected serial name** – Chronology of the received issue.
 - **Expected serial numeration** – Enumeration of the received issue.
 - **Title** – The title of the received issue.

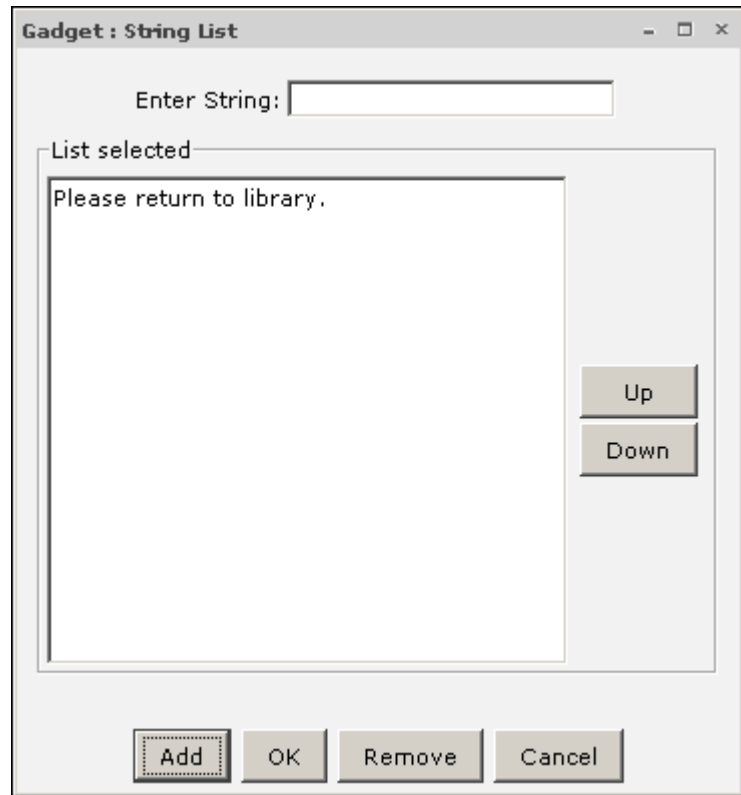


10. Click **OK** when finished to return to the Set Properties window.
11. Click the **Receipt user fields** gadget. The receipt fields gadget appears.
12. Highlight the user information to print on the routing slip in the **List to choose from** column and click the right arrow to move to the **List selected** column:
 - **Name** – The Name from the user record.
 - **User Address 1** – User address 1 from the user record.
 - **User extended info** – Extended information from the user record.

Note User extended information will only print if a synonym list is defined in the properties on the Behavior tab.



13. Click **OK** when finished to return to the Set Properties window.
14. Click the **Receipt footer** gadget. The string list gadget appears.
15. Type footer text in the **Enter string** box and click **Add**.
 - Multiple lines can be entered, up to 30 characters each.
 - Highlight the line to change the order using the **Up** and **Down** buttons. Or, click **Remove** to delete the line.



16. Click **OK** when finished to return to the Set Properties window.

Check In : Set Properties

Defaults

Print routing lists without confirmation

Receipt header:
Arrowood Library
123 Anywhere St.
Some City, US
505-123-4567

Receipt general fields:
Title
Date serial received
Expected serial name
Expected serial numeration

Receipt user fields:
Name
User address

Receipt footer:
Please return to library.

OK Cancel

17. Click **OK** when finished to return to the Check In Properties.

Print Layout

Based on the information entered in the Set Properties, the data appears on the routing slip in the following order.

1. Header
2. Receipt fields that print once for the entire slip:
 - Title
 - Copy Number
3. Receipt fields that print for each user on the routing list:
 - Name
 - User Address (brief)
 - User extended information (brief, full, or all)
4. Footer

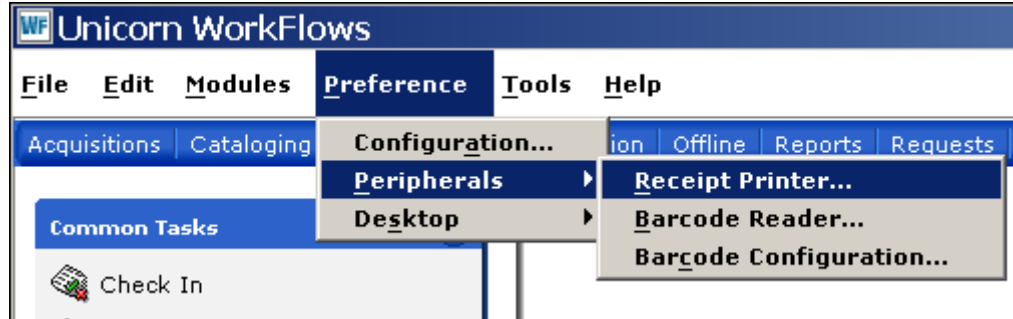
All data will be left justified and each piece of data will have its own line(s) on the receipt.

Client Level Settings

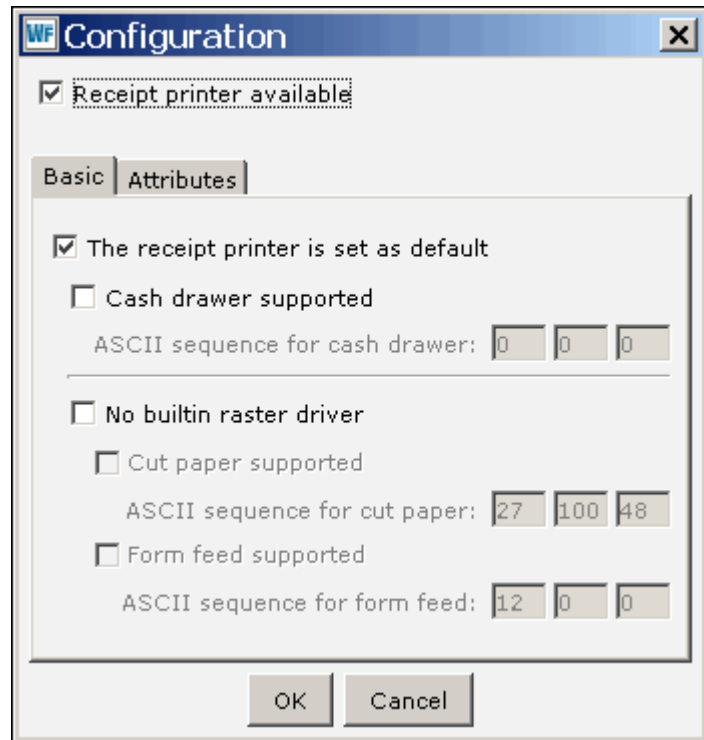
The Preference menu provides options to allow you to select a default printer, attached receipt printer, font, and page size.

Receipt Printer

1. Go to **Preference > Peripherals > Receipt Printer**.



The Configuration window appears:

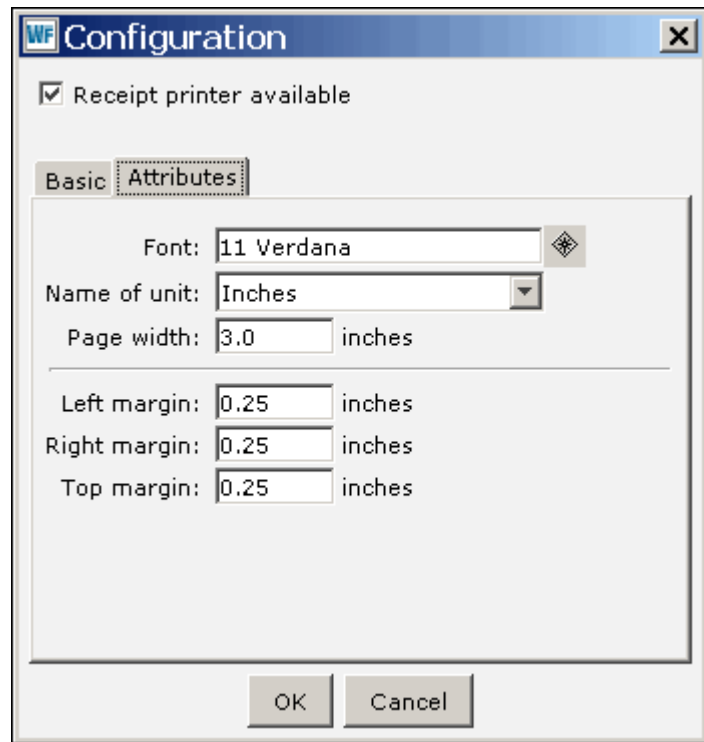


2. Select the **Receipt printer available** check box. The remaining options become enabled.
3. Select the **The receipt printer is set as default** check box.

4. Select the **Cash drawer supported** check box.
5. Enter the **ASCII sequence for the cash drawer**.

Note Cash drawer settings do not impact routing lists.

6. Click the **Attributes** tab.



7. Select the **Receipt printer available** check box.
8. Use the **Font** gadget to select a font.
9. Select a measurement to use in the **Name of unit** list.
10. Type a **Page width**.
11. Type the width of the **Left margin**.
12. Type the width of the **Right margin**.
13. Type the height of the **Top margin**.
14. Click **OK**.

Print Preview Vs. Print Automatically

The two options, Print routing lists without confirmation and The receipt printer is set as default, work together to provide three possible workflows for the user.

Print Automatically and Select a Printer

Option	Selected?
Print routing lists without confirmation	Yes
The receipt printer is set as default	No

Under this scenario, a dialog box displays at the time of check-in so that the user can select a printer. This allows the user to send the routing list to any printer that is connected.

Print Automatically and Print to a Default Printer

Option	Selected?
Print routing lists without confirmation	Yes
The receipt printer is set as default	Yes

Under this scenario, the routing slip prints without letting the user select the printer.

Print Preview

Option	Selected?
Print routing lists without confirmation	No
The receipt printer is set as default	Yes or No

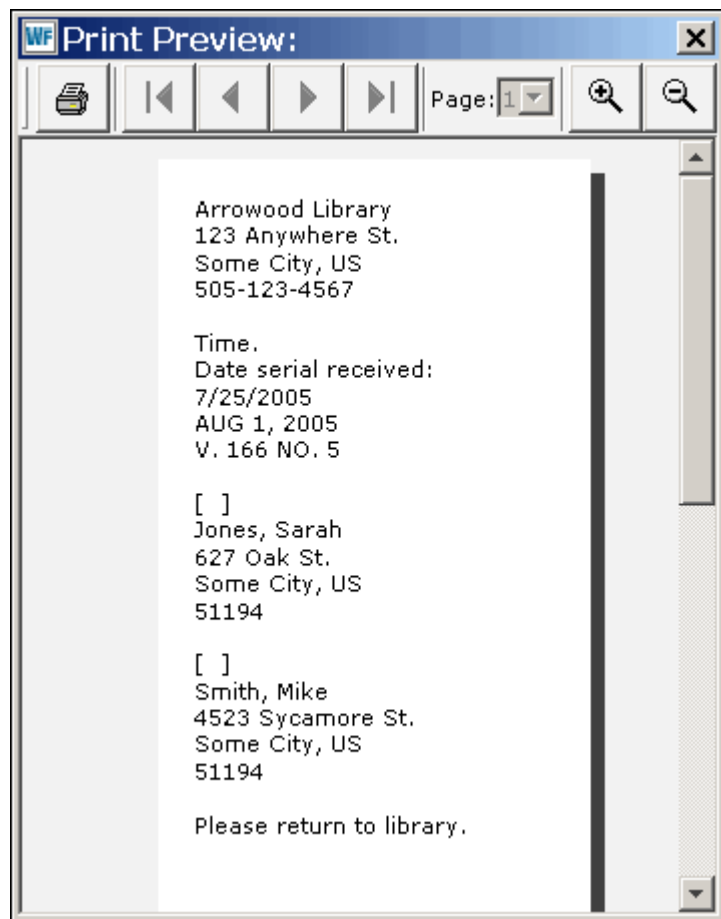
Under this scenario, a print preview displays for the user before sending it to the printer. The receipt printer can or cannot be the default printer. Refer to the Print Preview Workflow section for more options.

Print Preview Workflow

This workflow allows the user to:

- Print the routing list by selecting the printer icon.
- Cancel by clicking the “X” in the upper right hand corner.
- Magnify the routing list using the + or – magnifying glasses.

If multiple copies of an issue are received, a print preview of the routing list appears for each copy.



Spine and Pocket Label Configuration

Printing spine labels, including pocket labels, is connected to the Check In wizard. The Label Designer provides better configuration and workflow. Helpers are available with the Modify a Serial Control and Display Serial Control wizards to allow you to print labels for issues before or after they have been received.

General Properties

The Check In wizard contains properties that determine whether or not labels will print.

Print Labels for Received Issues

The Print Labels for Received Issues option controls the routing slip functionality with two choices:

- Automatically
- With print preview

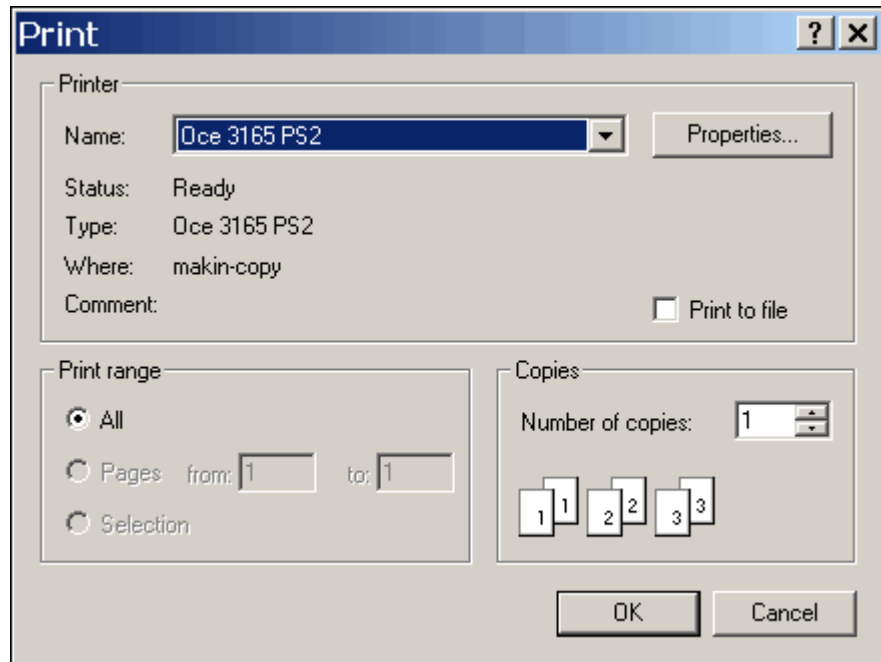
The system administrator sets this option. By default, the option is not enabled.

Print Labels for Received Issues: Automatically

If this choice is selected, a default label template established in the Label Designer is used to automatically print a label during the check-in process.

The workflow is as follows:

1. You check-in an issue.
2. A barcode item is created if the control is configured to do so.
3. A Print dialog box appears. The user selects a printer for the spine label.



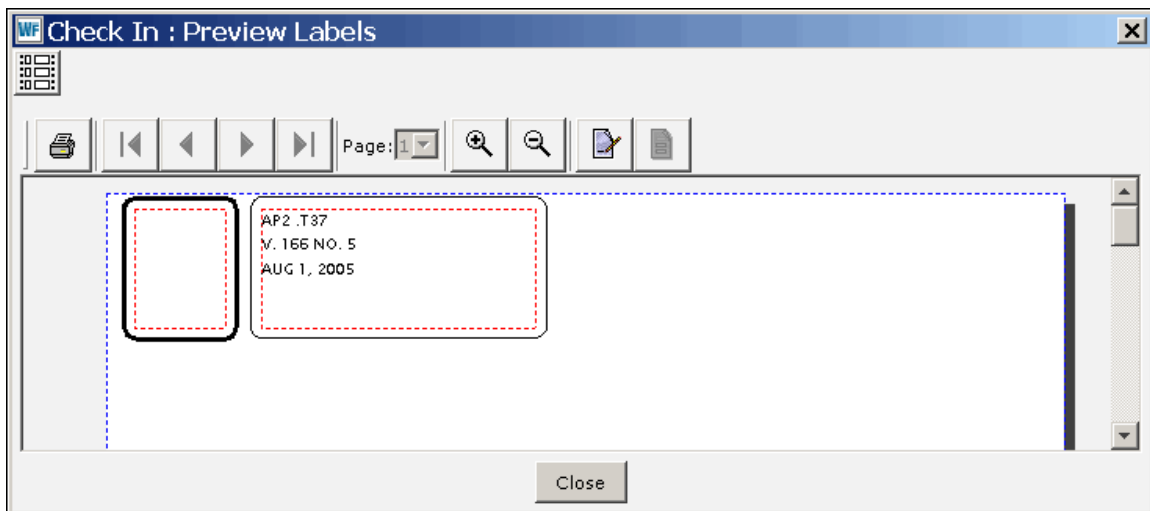
4. Any routing slips associated with the control record print.
5. A confirmation window appears with a summary of the check-in.

Print Labels for Received Issues: With Print Preview

With this choice, a window appears displaying the label to be printed. You can then decide to go ahead and print the label or cancel.

The workflow is as follows:

1. You check-in an issue.
2. A barcode item is created if the control is configured to do so.
3. A Preview Labels window appears. To print the label, click the printer icon or close the window.



4. Any routing slips associated with the control record print.
5. A confirmation window appears with a summary of the check-in.

Label Designer

When creating a template for check-in records in the Label Designer, select **Check In** for the type and select the appropriate value. The values are: base call number, enumeration, and chronology. All or a combination of the values can be selected.

Appendix A – Calendar Guides

Calendar Guide for 2006

JANUARY (MONTH #1)								JULY (MONTH #7)								
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#	
1	2	3	4	5	6	7	#1							1	#26	
8	9	10	11	12	13	14	#2	2	3	4	5	6	7	8	#27	
15	16	17	18	19	20	21	#3	9	10	11	12	13	14	15	#28	
22	23	24	25	26	27	28	#4	16	17	18	19	20	21	22	#29	
29	30	31					#5	23	24	25	26	27	28	29	#30	
								30	31						#31	
FEBRUARY (MONTH #2)								AUGUST (MONTH #8)								
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#	
			1	2	3	4	#5			1	2	3	4	5	#31	
5	6	7	8	9	10	11	#6	6	7	8	9	10	11	12	#32	
12	13	14	15	16	17	18	#7	13	14	15	16	17	18	19	#33	
19	20	21	22	23	24	25	#8	20	21	22	23	24	25	26	#34	
26	27	28					#9	27	28	29	30	31			#35	
MARCH (MONTH #3)								SEPTEMBER (MONTH #9)								
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#	
			1	2	3	4	#9							1	2	#35
5	6	7	8	9	10	11	#10	3	4	5	6	7	8	9	#36	
12	13	14	15	16	17	18	#11	10	11	12	13	14	15	16	#37	
19	20	21	22	23	24	25	#12	17	18	19	20	21	22	23	#38	
26	27	28	29	30	31		#13	24	25	26	27	28	29	30	#39	
APRIL (MONTH #4)								OCTOBER (MONTH #10)								
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#	
						1	#13	1	2	3	4	5	6	7	#40	
2	3	4	5	6	7	8	#14	8	9	10	11	12	13	14	#41	
9	10	11	12	13	14	15	#15	15	16	17	18	19	20	21	#42	
16	17	18	19	20	21	22	#16	22	23	24	25	26	27	28	#43	
23	24	25	26	27	28	29	#17	29	30	31					#44	
30							#18									
MAY (MONTH #5)								NOVEMBER (MONTH #11)								
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#	
	1	2	3	4	5	6	#18				1	2	3	4	#44	
7	8	9	10	11	12	13	#19	5	6	7	8	9	10	11	#45	
14	15	16	17	18	19	20	#20	12	13	14	15	16	17	18	#46	
21	22	23	24	25	26	27	#21	19	20	21	22	23	24	25	#47	
28	29	30	31				#22	26	27	28	29	30			#48	
JUNE (MONTH #6)								DECEMBER (MONTH #12)								
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#	
				1	2	3	#22							1	2	#48
4	5	6	7	8	9	10	#23	3	4	5	6	7	8	9	#49	
11	12	13	14	15	16	17	#24	10	11	12	13	14	15	16	#50	
18	19	20	21	22	23	24	#25	17	18	19	20	21	22	23	#51	
25	26	27	28	29	30		#26	24	25	26	27	28	29	30	#52	
								31								

Calendar Guide for 2007

JANUARY (MONTH #1)							JULY (MONTH #7)								
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#
	1	2	3	4	5	6	#1	1	2	3	4	5	6	7	#27
7	8	9	10	11	12	13	#2	8	9	10	11	12	13	14	#28
14	15	16	17	18	19	20	#3	15	16	17	18	19	20	21	#29
21	22	23	24	25	26	27	#4	22	23	24	25	26	27	28	#30
28	29	30	31				#5	29	30	31				#31	
FEBRUARY (MONTH #2)							AUGUST (MONTH #8)								
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#
				1	2	3	#5				1	2	3	4	#31
4	5	6	7	8	9	10	#6	5	6	7	8	9	10	11	#32
11	12	13	14	15	16	17	#7	12	13	14	15	16	17	18	#33
18	19	20	21	22	23	24	#8	19	20	21	22	23	24	25	#34
25	26	27	28				#9	26	27	28	29	30	31	#35	
MARCH (MONTH #3)							SEPTEMBER (MONTH #9)								
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#
				1	2	3	#9						1		#35
4	5	6	7	8	9	10	#10	2	3	4	5	6	7	8	#36
11	12	13	14	15	16	17	#11	9	10	11	12	13	14	15	#37
18	19	20	21	22	23	24	#12	16	17	18	19	20	21	22	#38
25	26	27	28	29	30	31	#13	23	24	25	26	27	28	29	#39
								30							#40
APRIL (MONTH #4)							OCTOBER (MONTH #10)								
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#
1	2	3	4	5	6	7	#14		1	2	3	4	5	6	#40
8	9	10	11	12	13	14	#15	7	8	9	10	11	12	13	#41
15	16	17	18	19	20	21	#16	14	15	16	17	18	19	20	#42
22	23	24	25	26	27	28	#17	21	22	23	24	25	26	27	#43
29	30						#18	28	29	30	31				#44
MAY (MONTH #5)							NOVEMBER (MONTH #11)								
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#
		1	2	3	4	5	#18					1	2	3	#44
6	7	8	9	10	11	12	#19	4	5	6	7	8	9	10	#45
13	14	15	16	17	18	19	#20	11	12	13	14	15	16	17	#46
20	21	22	23	24	25	26	#21	18	19	20	21	22	23	24	#47
27	28	29	30	31			#22	25	26	27	28	29	30	#48	
JUNE (MONTH #6)							DECEMBER (MONTH #12)								
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#
				1	2		#22						1		#48
3	4	5	6	7	8	9	#23	2	3	4	5	6	7	8	#49
10	11	12	13	14	15	16	#24	9	10	11	12	13	14	15	#50
17	18	19	20	21	22	23	#25	16	17	18	19	20	21	22	#51
24	25	26	27	28	29	30	#26	23	24	25	26	27	28	29	#52
								30	31						

Calendar Guide for 2008

JANUARY							(MONTH #1)	JULY							(MONTH #7)
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#
		1	2	3	4	5	#1			1	2	3	4	5	#27
6	7	8	9	10	11	12	#2	6	7	8	9	10	11	12	#28
13	14	15	16	17	18	19	#3	13	14	15	16	17	18	19	#29
20	21	22	23	24	25	26	#4	20	21	22	23	24	25	26	#30
27	28	29	30	31			#5	27	28	29	30	31			#31
FEBRUARY							(MONTH #2)	AUGUST							(MONTH #8)
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#
					1	2	#5						1	2	#31
3	4	5	6	7	8	9	#6	3	4	5	6	7	8	9	#32
10	11	12	13	14	15	16	#7	10	11	12	13	14	15	16	#33
17	18	19	20	21	22	23	#8	17	18	19	20	21	22	23	#34
24	25	26	27	28	29		#9	24	25	26	27	28	29	30	#35
								31							#36
MARCH							(MONTH #3)	SEPTEMBER							(MONTH #9)
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#
						1	#9	1	2	3	4	5	6	#36	
2	3	4	5	6	7	8	#10	7	8	9	10	11	12	13	#37
9	10	11	12	13	14	15	#11	14	15	16	17	18	19	20	#38
16	17	18	19	20	21	22	#12	21	22	23	24	25	26	27	#39
23	24	25	26	27	28	29	#13	28	29	30					#40
30	31						#14								
APRIL							(MONTH #4)	OCTOBER							(MONTH #10)
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#
		1	2	3	4	5	#14			1	2	3	4	#40	
6	7	8	9	10	11	12	#15	5	6	7	8	9	10	11	#41
13	14	15	16	17	18	19	#16	12	13	14	15	16	17	18	#42
20	21	22	23	24	25	26	#17	19	20	21	22	23	24	25	#43
27	28	29	30				#18	26	27	28	29	30	31	#44	
MAY							(MONTH #5)	NOVEMBER							(MONTH #11)
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#
			1	2	3		#18						1	#44	
4	5	6	7	8	9	10	#19	2	3	4	5	6	7	8	#45
11	12	13	14	15	16	17	#20	9	10	11	12	13	14	15	#46
18	19	20	21	22	23	24	#21	16	17	18	19	20	21	22	#47
25	26	27	28	29	30	31	#22	23	24	25	26	27	28	29	#48
								30							#49
JUNE							(MONTH #6)	DECEMBER							(MONTH #12)
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#
1	2	3	4	5	6	7	#23	1	2	3	4	5	6	#49	
8	9	10	11	12	13	14	#24	7	8	9	10	11	12	13	#50
15	16	17	18	19	20	21	#25	14	15	16	17	18	19	20	#51
22	23	24	25	26	27	28	#26	21	22	23	24	25	26	27	#52
29	30						#27	28	29	30	31				

Calendar Guide for 2009

JANUARY							(MONTH #1)	JULY							(MONTH #7)					
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#					
				1	2	3	#1					1	2	3	4	#27				
4	5	6	7	8	9	10	#2	5	6	7	8	9	10	11	#28					
11	12	13	14	15	16	17	#3	12	13	14	15	16	17	18	#29					
18	19	20	21	22	23	24	#4	19	20	21	22	23	24	25	#30					
25	26	27	28	29	30	31	#5	26	27	28	29	30	31	#31						
FEBRUARY							(MONTH #2)	AUGUST							(MONTH #8)					
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#					
1	2	3	4	5	6	7	#6							1	#31					
8	9	10	11	12	13	14	#7	2	3	4	5	6	7	8	#32					
15	16	17	18	19	20	21	#8	9	10	11	12	13	14	15	#33					
22	23	24	25	26	27	28	#9	16	17	18	19	20	21	22	#34					
								23	24	25	26	27	28	29	#35					
								30	31						#36					
MARCH							(MONTH #3)	SEPTEMBER							(MONTH #9)					
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#					
1	2	3	4	5	6	7	#10			1	2	3	4	5	#36					
8	9	10	11	12	13	14	#11	6	7	8	9	10	11	12	#37					
15	16	17	18	19	20	21	#12	13	14	15	16	17	18	19	#38					
22	23	24	25	26	27	28	#13	20	21	22	23	24	25	26	#39					
29	30	31	#14	27	28	29	30	#40												
APRIL							(MONTH #4)	OCTOBER							(MONTH #10)					
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#					
				1	2	3	4	#14						1	2	3	#40			
5	6	7	8	9	10	11	#15	4	5	6	7	8	9	10	#41					
12	13	14	15	16	17	18	#16	11	12	13	14	15	16	17	#42					
19	20	21	22	23	24	25	#17	18	19	20	21	22	23	24	#43					
26	27	28	29	30	#18	25	26	27	28	29	30	31	#44							
MAY							(MONTH #5)	NOVEMBER							(MONTH #11)					
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#					
					1	2	#18	1	2	3	4	5	6	7	#45					
3	4	5	6	7	8	9	#19	8	9	10	11	12	13	14	#46					
10	11	12	13	14	15	16	#20	15	16	17	18	19	20	21	#47					
17	18	19	20	21	22	23	#21	22	23	24	25	26	27	28	#48					
24	25	26	27	28	29	30	#22	29	30						#49					
31	#23																			
JUNE							(MONTH #6)	DECEMBER							(MONTH #12)					
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#					
				1	2	3	4	5	6	#23					1	2	3	4	5	#49
7	8	9	10	11	12	13	#24	6	7	8	9	10	11	12	#50					
14	15	16	17	18	19	20	#25	13	14	15	16	17	18	19	#51					
21	22	23	24	25	26	27	#26	20	21	22	23	24	25	26	#52					
28	29	30	#27	27	28	29	30	31												

Calendar Guide for 2010

JANUARY							(MONTH #1)	JULY							(MONTH #7)	
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#	
					1	2	#1						1	2	3	#27
3	4	5	6	7	8	9	#2	4	5	6	7	8	9	10	#28	
10	11	12	13	14	15	16	#3	11	12	13	14	15	16	17	#29	
17	18	19	20	21	22	23	#4	18	19	20	21	22	23	24	#30	
24	25	26	27	28	29	30	#5	25	26	27	28	29	30	31	#31	
31							#6									
FEBRUARY							(MONTH #2)	AUGUST							(MONTH #8)	
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#	
	1	2	3	4	5	6	#6	1	2	3	4	5	6	7	#32	
7	8	9	10	11	12	13	#7	8	9	10	11	12	13	14	#33	
14	15	16	17	18	19	20	#8	15	16	17	18	19	20	21	#34	
23	22	23	24	25	26	27	#9	22	23	24	25	26	27	28	#35	
28							#10	29	30	31					#36	
MARCH							(MONTH #3)	SEPTEMBER							(MONTH #9)	
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#	
	1	2	3	4	5	6	#10				1	2	3	4	#36	
7	8	9	10	11	12	13	#11	5	6	7	8	9	10	11	#37	
14	15	16	17	18	19	20	#12	12	13	14	15	16	17	18	#38	
21	22	23	24	25	26	27	#13	19	20	21	22	23	24	25	#39	
28	29	30	31				#14	26	27	28	29	30			#40	
APRIL							(MONTH #4)	OCTOBER							(MONTH #10)	
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#	
				1	2	3	#14						1	2	#40	
4	5	6	7	8	9	10	#15	3	4	5	6	7	8	9	#41	
11	12	13	14	15	16	17	#16	10	11	12	13	14	15	16	#42	
18	19	20	21	22	23	24	#17	17	18	19	20	21	22	23	#43	
25	26	27	28	29	30	#18	24	25	26	27	28	29	30	#44		
								31							#45	
MAY							(MONTH #5)	NOVEMBER							(MONTH #11)	
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#	
						1	#18	1	2	3	4	5	6	#45		
2	3	4	5	6	7	8	#19	7	8	9	10	11	12	13	#46	
9	10	11	12	13	14	15	#20	14	15	16	17	18	19	20	#47	
16	17	18	19	20	21	22	#21	21	22	23	24	25	26	27	#48	
23	24	25	26	27	28	29	#22	28	29	30					#49	
30	31						#23									
JUNE							(MONTH #6)	DECEMBER							(MONTH #12)	
S	M	T	W	T	F	S	WEEK#	S	M	T	W	T	F	S	WEEK#	
		1	2	3	4	5	#23				1	2	3	4	#49	
6	7	8	9	10	11	12	#24	5	6	7	8	9	10	11	#50	
13	14	15	16	17	18	19	#25	12	13	14	15	16	17	18	#51	
20	21	22	23	24	25	26	#26	19	20	21	22	23	24	25	#52	
27	28	29	30				#27	26	27	28	29	30	31			

Appendix B – Chronology Types

For more information about chronology types, see the WorkFlows Online Help file.

Chronology Type	Definitions of Chronology Type Field Patterns	Example of Prediction Record Chronology Field Entries For Patterns
BIMONTH	JAN/FEB, MAR/APR, MAY/JUN, JUL/AUG, SEP/OCT, NOV/DEC	MAR/APR 2006
BIMONTH2	DEC/JAN, FEB/MAR, APR/MAY, JUN/JUL, AUG/SEP, OCT/NOV	APR/MAY 2006
DATE	JAN, FEB, MAR, APR, MAY, JUN, JUL, AUG, SEP, OCT, NOV, DEC	APR 15, 2006
MONTH	JAN, FEB, MAR, APR, MAY, JUN, JUL, AUG, SEP, OCT, NOV, DEC	APR 2006
NUMERATION	The publication uses enumeration labels only	
SEASON	WIN, SPR, SUM, FALL (note WINTER is first element in cycle)	SPR 2006
SEASON2	SPR, SUM, FALL, WIN (note SPRING is first element in cycle)	SPR 2006
SEASON3	JAN/MAR, APR/JUN, JUL/SEP, OCT/DEC (note this is a three month season combination)	APR/JUN 2006
TEXT	Enter custom names (up to 200 characters may be entered).	Format to suit custom name entry, adding first publication receipt date as beginning prediction date
YEAR	Expressed as a four-digit year only	2006

Appendix C – Follow-up Serials Control Activities

The following pieces of information are necessary to set up a serial control record and to generate predictions:

- Title
 - Example: Newsweek
- Enumeration of Latest Issue
 - Example: Vol. 141 No. 19
- Number of parts in the second and subsequent levels of enumeration
 - Example: 52 issues per year
- Levels of enumeration that are continuous
 - Example: Issue numbers do not restart with each increase in volume number. (Vol. 141, No. 51; Vol. 141, No. 52, Vol. 142, No. 53; Vol. 142, No. 54)
- Chronology of Latest Issue
 - Example: May 19, 2006
- Frequency of Publication
 - Example: weekly
- Date of first prediction (i.e., the starting point for creating predictions)
 - Example: May 19, 2006
- Receipt date of the latest issue
 - Example: May 26, 2006

Exercise 1: Predict A Regular Monthly Publication

This is a monthly publication. The periodical began publication in January 2006. You will begin predicting issues the first year and first month of the publication. The issue you have in hand is Volume 1, No. 1, January 2006.

Create a brief item record for this title. However, if your serial title is already cataloged in SirsiDynix Symphony 3.2, adding a title will not be necessary.

TITLE: _____

1. On the Common Tasks toolbar, click the **Create Control** wizard.
2. Search for the serial title you just created.
3. If a multi-library system, select the appropriate **Library** and **Holding code**.
4. Select the appropriate pattern template consistent with the subscription, if prompted.
5. Basic Tab:
 - a. Class Scheme: **LCPER**
6. Patterns Tab:
 - a. Verify the values in the Enumeration Pattern area.
 - b. Verify the values in the Chronology Pattern area. Chronology type: **Month**.
 - c. Verify the values in the Publication Pattern area.
7. Subscription Tab:
 - a. Verify the value of copies to receive is **1** (receive one physical copy).
 - b. Verify the number of issues is **12** (12 monthly issues in a year).
 - c. Link for Ordering/Claiming: Enter a **Fiscal Cycle** and **Vendor ID**.
8. Click **Create Control**. The Get Expected Issue Info window appears.
 - a. Verify the number of predictions you want to preview. Predict a minimum of **13**.
 - b. Enter the **Enumeration** of the first issue you want to predict.
 - c. Enter the **Chronology** of the first issue you want to predict.

- d. Enter the **Date First Prediction**.
- e. Enter the **Date Expected**.
9. Click **Generate Predictions**.
10. Review the predictions in the Prediction Records area.
 - If satisfactory, select **Save Prediction**.
 - If changes are needed, select **Redo Prediction**, and make the necessary changes.

Exercise 2: Predict a Weekly Periodical and Check-in Issues

This is a weekly publication. The periodical began publication in January 1940. You will begin predicting issues the sixty-sixth year and first month of the publication. The issue you have in hand is Volume 67, No. 1, January 2, 2006.

Create a brief item record for this title. However, if your serial title is already cataloged in SirsiDynix Symphony 3.2, adding the title will not be necessary.

TITLE: _____

1. On the Common Tasks toolbar, click the **Create Control** wizard.
2. Search for the serial title.
3. If a multi-library system, select the appropriate **Library** and **Holding code**.
4. Select the appropriate pattern template consistent with the subscription, if prompted.
5. Basic Tab:
 - a. Class Scheme: **LCPER**
6. Patterns Tab:
 - a. Verify the values in the Enumeration Pattern area.
 - b. Verify the values in the Chronology Pattern area. Chronology type: **Date**.
 - c. Verify the values in the Publication Pattern area.
7. Subscription Tab:
 - a. Verify the value of copies to receive is **1** (receive one physical copy).
 - b. Verify the number of issues is **52** (52 weekly issues received in the year).
 - c. Link for Ordering/Claiming: Enter a **Fiscal Cycle** and **Vendor ID**.
8. Extended Info Tab:
 - a. Enter a NOTE: **Watch for special issues**.
9. Click **Create Control**. The Get Expected Issue Info window appears.
 - a. Verify the number of predictions you want to preview. Predict a minimum of **53**.
 - b. Enter the **Enumeration** of the first issue you want to predict.

- c. Enter the **Chronology** of the first issue you want to predict.
 - d. Enter the **Date First Prediction**.
 - e. Enter the **Date Expected**.
10. Click **Generate Predictions**.
 11. Review the predictions in the Prediction Records area.
 - If satisfactory, select **Save Prediction**.
 - If changes are needed, select **Redo Prediction**, and make the necessary changes.

Imagine that the next expected issue of the title you predicted above has arrived. To check-in the issue, follow these steps in the WorkFlows client.

1. On the Common Tasks toolbar, click the **Check In** wizard.
2. Search by periodical title for the record created above. Identify your record and select **Check In Issues**.
3. Imagine that you compare the “issue in hand,” with the information displayed by SirsiDynix Symphony 3.2, and they match. Click **Check In Now** to receive the issue.
4. On the resulting window, click **Next Issue**.
5. Receive several more issues.
6. Display the title using the **Item Search and Display** wizard to see how the records have been updated.
7. Display the title in the OPAC to see how the holdings will display to the public.

Exercise 3: Predict a Bimonthly Periodical, and Include Check-in Notes in the Control Record

This is a bimonthly publication. The periodical began publication with the January 1986 issue. You will begin predicting issues the twentieth year and fourth issue of the publication. The issue you have in hand is Volume 21, No. 4, July/Aug, 2006.

Create a brief item record for this title. However, if your serial title is already cataloged in SirsiDynix Symphony 3.2, adding a title will not be necessary.

TITLE: _____

1. On the Common Tasks toolbar, click the **Create Control** wizard.
2. Search for the serial title.
3. If a multi-library system, select the appropriate **Library** and **Holding code**.
4. Select the appropriate pattern template consistent with the subscription, if prompted.
5. Basic Tab:
 - a. Class Scheme: **LCPER**
6. Patterns Tab:
 - a. Verify the values in the Enumeration Pattern area
 - b. Verify the values in the Chronology Pattern area. Chronology type: **Bimonthly**.
 - c. Verify the values in the Publication Pattern area.
7. Subscription Tab:
 - a. Verify the value of copies to receive is **1** (receive one physical copy).
 - b. Verify the number of issues is **6** (six bimonthly issues in a year).
 - c. Link for Ordering/Claiming: Enter a **Fiscal Cycle** and **Vendor ID**.
8. Extended Info Tab:
 - a. Add a receiving note in the **NOTE** box: **Watch for special issues**.
9. Click **Create Control**. The Get Expected Issue Info window appears.
 - a. Verify the number of predictions you want to preview. Predict a minimum of **7**.

- b. Enter the **Enumeration** of the first issue you want to predict.
 - c. Enter the **Chronology** of the first issue you want to predict.
 - d. Enter the **Date First Prediction**.
 - e. Enter the **Date Expected**.
10. Click **Generate Predictions**.
 11. Review the predictions in the Prediction Records area.
 - If satisfactory, select **Save Prediction**.
 - If changes are needed, select **Redo Prediction**, and make the necessary changes.

Exercise 4: Predict a Daily Periodical and Check-in Issues

This is a daily publication; however, it is not published on Sundays. The periodical began publication in January 1989. The issue you have in hand is Volume 18, No. 129, June 1, 2006.

Create a brief item record for this title. However, if your serial title is already cataloged in SirsiDynix Symphony 3.2, adding the title will not be necessary.

TITLE: _____

1. Select the **Create Control** wizard.
2. Search for the serial title.
3. If a multi-library system, select the appropriate **Library** and **Holding code**.
4. Select the appropriate pattern template consistent with the subscription, if prompted.
5. Basic Tab:
 - a. Class Scheme: **LCPER**
6. Patterns Tab:
 - a. Verify the values in the Enumeration Pattern area.
 - b. Verify the values in the Chronology Pattern area. Chronology type: **Date**.
 - c. Verify the values in the Publication Pattern area.
 - d. Click the **Publication cycle** gadget.
 - e. Click the **Omit Issues by** helper.
 - f. Click the **Day of Week** tab.
 - g. Select the **Sunday** check box to indicate that Sunday is omitted. Click **OK**.
 - h. Click **OK** for the various gadget windows if the information is acceptable.
7. Subscription Tab:
 - a. Verify the value of copies to receive is **1** (receive one physical copy).
 - b. Verify the number of issues is **313** (365 issues a year minus 52 issues for each Sunday).
 - c. Link for Ordering/Claiming: Enter a **Fiscal Cycle** and **Vendor ID**.
8. Click **Create Control**. The Get Expected Issue Info window appears.

- a. Verify the number of predictions you want to preview. Predict a minimum of **314**.
 - b. Enter the **Enumeration** of the first issue you want to receive.
 - c. Enter the **Chronology** of the first issue you want to receive.
 - d. Enter the **Date First Prediction**.
 - e. Enter the **Date Expected**.
9. Click **Generate Predictions**.
 10. Review the predictions in the Prediction Records area.
 - If satisfactory, select **Save Prediction**.
 - If changes are needed, select **Redo Prediction**, and make the necessary changes.

Exercise 5: Predict a Quarterly Periodical, and Check-in Issues

This is a quarterly publication. The periodical began publication with the winter issue in 1979 Vol.1, No.1. You will begin receiving this publication from Vol. 28, No. 3 (Summer 2006). The issue you have in hand is Summer 2005 Vol. 27 No. 3.

Create a brief item record for this title. However, if your serial title is already cataloged in SirsiDynix Symphony 3.2, adding the title will not be necessary.

TITLE: _____

1. On the Common Tasks toolbar, click the **Create Control** wizard.
2. Search for the serial title.
3. If a multi-library system, select the appropriate **Library** and **Holding code**.
4. Select the appropriate pattern template consistent with the subscription, if prompted.
5. Basic Tab:
 - a. Class Scheme: **LCPER**
6. Patterns Tab:
 - a. Verify the values in the Enumeration Pattern area.
 - b. Verify the values in the Chronology Pattern area. Chronology type: **Season**.
 - c. Verify the values in the Publication Pattern area.
7. Subscription Tab:
 - a. Verify the value of copies to receive is **1** (receive one physical copy).
 - b. Verify the number of issues is **4** (four issues a year).
 - c. Link for Ordering/Claiming: Enter a **Fiscal Cycle** and **Vendor ID**.
8. Distribution Tab:
 - a. Click the **Modify a Distribution** tool.
 - b. Select the **Update MARC holdings records** check box.
 - c. Enter **1** in the Copies to Add to the Catalog box.
 - d. Click **Modify Distribution**.

9. Click **Create Control**. The Get Expected Issue Info window appears.
 - a. Verify the number of predictions you want to preview. Predict a minimum of **5**.
 - b. Enter the **Enumeration** of the first issue you want to receive.
 - c. Enter the **Chronology** of the first issue you want to receive.
 - d. Enter the **Date First Prediction**.
 - e. Enter the **Date Expected**.
10. Click **Generate Predictions**.
11. Review the predictions in the Prediction Records area.
 - If satisfactory, select **Save Prediction**.
 - If changes are needed, select **Redo Prediction**, and make the necessary changes.

Exercise 6: Predict a Semi-Monthly Periodical, and Check-in Issues

This is a semi-monthly publication published on the first and fifteenth of each month. The periodical began publication in April 1936. You will begin predicting issues the seventieth year and first month of the publication. The next issue you expect to receive is Volume 71, No. 1, April 1, 2006.

Create a brief item record for this title. However, if your serial title is already cataloged in SirsiDynix Symphony 3.2, adding the title will not be necessary.

TITLE: _____

1. On the Common Tasks toolbar, click the **Create Control** wizard.
2. Search for the serial title.
3. If a multi-library system, select the appropriate **Library** and **Holding code**.
4. Select the appropriate pattern template consistent with the subscription, if prompted.
5. Basic Tab:
 - a. Class Scheme: **LCPER**
6. Patterns Tab:
 - a. Verify the values in the Enumeration Pattern area.
 - b. Verify the values in the Chronology Pattern area. Chronology type: **Date**.
 - c. Verify the values in the Publication Pattern area.
7. Subscription Tab:
 - a. Verify the value of copies to receive is **1** (receive one physical copy).
 - b. Verify the number of issues is **24** (24 semimonthly issues a year).
 - c. Link for Ordering/Claiming: Enter a **Fiscal Cycle** and **Vendor ID**.
8. Click **Create Control**. The Get Expected Issue Info window appears.
 - a. Verify the number of predictions you want to preview. Predict a minimum of **25**.
 - b. Enter the **Enumeration** of the first issue you want to predict.

- c. Enter the **Chronology** of the first issue you want to predict.
 - d. Enter the **Date First Prediction**.
 - e. Enter the **Date Expected**.
9. Click **Generate Predictions**.
 10. Review the predictions in the Prediction Records area.
 - If satisfactory, select **Save Prediction**.
 - If changes are needed, select **Redo Prediction**, and make the necessary changes.

Imagine that the next expected issue of the title you predicted above has arrived. To check-in the issue, follow these steps in the WorkFlows client.

1. On the Common Tasks toolbar, click the **Check In** wizard.
2. Search by periodical title for the record created above. Identify your record and click **Check In Issues**.
3. Imagine that you compare the “issue in hand,” with the information displayed by SirsiDynix Symphony 3.2, and they match. Click **Check In Now** to receive the issue.
4. On the resulting window, click **Next Issue**.
5. Receive several more issues.
6. Display the title using the **Item Search and Display** wizard to see how the records have been updated.

Exercise 7: Predict an Annual Serial Publication, and Check-in Issues

This is an annual publication. The periodical began publication in 1960. You will begin predicting issues for 2005. The issue you have in hand is 2006. There are no volume numbers.

Create a brief item record for this title. However, if your serial title is already cataloged in SirsiDynix Symphony 3.2, adding the title will not be necessary.

TITLE: _____

1. On the Common Tasks toolbar, click the **Create Control** wizard.
2. Search for the serial title.
3. If a multi-library system, select the appropriate **Library** and **Holding code**.
4. Select the appropriate pattern template consistent with the subscription, if prompted.
5. Basic Tab:
 - a. Class Scheme: **LCPER**
6. Patterns Tab:
 - a. Verify the values in the Enumeration Pattern area. Clear the check boxes for **V.** and **NO.**
 - b. Verify the values in the Chronology Pattern area. Chronology type: **Year**.
 - c. Verify the values in the Publication Pattern area.
7. Subscription Tab:
 - a. Verify the value of copies to receive is **1** (receive one physical copy).
 - b. Verify the number of issues is **1** (one issue a year).
 - c. Link for Ordering/Claiming: Enter a **Fiscal Cycle** and **Vendor ID**.
8. Click **Create Control**. The Get Expected Issue Info window appears.
 - a. Verify the number of predictions you want to preview. Predict a minimum of **4**.
 - b. Enter the **Chronology** of the first issue you want to receive.
 - c. Enter the **Date First Prediction**.
 - d. Enter the **Date Expected**.

9. Click **Generate Predictions**.
10. Review the predictions in the Prediction Records area.
 - If satisfactory, select **Save Prediction**.
 - If changes are needed, select **Redo Prediction**, and make the necessary changes.

Exercise 8: Predict a Monthly Periodical with Combined Issues, and Check-in Issues

This is a monthly publication with combined issues. The periodical began publication with the Sept./Oct. issue in 2006. Combined issues are Sept./Oct., and April/May. You will begin receiving this publication from its premier issue. The issue you have in hand is Vol. 1, No. 1 Sept/Oct 2006.

Create a brief item record for this title. However, if your serial title is already cataloged in SirsiDynix Symphony 3.2, adding the title will not be necessary.

TITLE: _____

1. On the Common Tasks toolbar, click the **Create Control** wizard.
2. Search for the serial title.
3. If a multi-library system, select the appropriate **Library** and **Holding code**.
4. Select the appropriate pattern template consistent with the subscription, if prompted.
5. Basic Tab:
 - a. Class Scheme: **LCPER**
6. Patterns Tab:
 - a. Verify the values in the Enumeration Pattern area.
 - b. Verify the values in the Chronology Pattern area. Chronology type: **Month**.
 - c. Verify the values in the Publication Pattern area.
 - d. Click the **Publication cycle** gadget.
 - e. Click the **Omit Issues by** helper.
 - f. Click the **Month** tab.
 - g. Select the **September** and **April** check boxes to indicate months not published. Click **OK**.
 - h. Click **OK** for the various gadget windows if the information is acceptable.
7. OPAC Display Tab:
 - a. Select the **Automatically update MARC holdings** check box.
 - b. Enter a **Number of most recently arrived issues to display as a note**.

8. Subscription Tab:
 - a. Verify the value of copies to receive is **1** (receive one physical copy).
 - b. Verify the number of issues is **10** (10 issues a year).
 - c. Link for Ordering/Claiming: Enter a **Fiscal Cycle** and **Vendor ID**.
9. Distribution Tab:
 - a. Click the **Modify a Distribution** tab.
 - b. Select the **Update MARC holdings records** check box.
 - c. Enter **1** in the Copies to Add to the Catalog box.
 - d. Click **Modify Distribution**.
10. Click **Create Control**. The Get Expected Issue Info window appears.
 - a. Verify the number of predictions you want to preview. Predict a minimum of **11**.
 - b. Enter the **Enumeration** of the first issue you want to receive.
 - c. Enter the **Chronology** of the first issue you want to receive.
 - d. Enter the **Date First Prediction**.
 - e. Enter the **Date Expected**.
11. Click **Generate Predictions**.
12. Review the predictions in the Prediction Records area.
 - If satisfactory, select **Save Prediction**.
 - If changes are needed, select **Redo Prediction**, and make the necessary changes.

In order to properly indicate that September and October, and April and May are combined, you must edit the control record.

1. On the Common Tasks toolbar, click the **Modify a Serial Control** wizard.
2. Search for the title.
3. Select the **Expected** tab.
 - a. Highlight the OCT 2006 issue, and click the **Modify An Issue** tool.
 - b. In the **Chronology** box, enter **SEP/OCT 2005**. Click **OK**.
 - c. Repeat the process for **APR/MAY 2006**.

Imagine that the next expected issue of the title you predicted above has arrived. To check-in the issue, follow these steps in the WorkFlows client.

1. On the Common Tasks toolbar, click the **Check In** wizard.
2. Search by periodical title for the record created above. Identify your record and click **Check In Issues**.
3. Imagine that you compare the “issue in hand,” with the information displayed by SirsiDynix Symphony 3.2, and they match. Click **Check In Now** to receive the issue.
4. On the resulting window, click **Next Issue**.
5. Receive several more issues.
6. Display the title using the **Item Search and Display** wizard to see how the records have been updated.
7. Display the title in the OPAC to see how the holdings will display to the public.

Exercise 9: Predict a Weekly Publication with Multi-Library Distributions

This is a weekly publication that will be received and processed centrally but distributed to multiple libraries. The periodical began publication in January 2006. You will begin receiving this publication from its premier issue. The issue you have in hand is Vol. 1, No. 1 January 2, 2006. You are going to receive two physical copies of each issue, which will be distributed to two different libraries.

Create a brief item record for this title. However, if your serial title is already cataloged in SirsiDynix Symphony 3.2, adding the title will not be necessary.

TITLE: _____

1. On the Common Tasks toolbar, click the **Create a Serial Control** wizard.
2. Search for the serial title.
3. If a multi-library system, select the appropriate **Library** and **Holding code**.
4. Select the appropriate pattern template consistent with the subscription, if prompted.
5. Basic Tab:
 - a. Class Scheme: **LCPER**
6. Patterns Tab:
 - a. Verify the values in the Enumeration Pattern area.
 - b. Verify the values in the Chronology Pattern area. Chronology type: **Date**.
 - c. Verify the values in the Publication Pattern area.
7. OPAC Display Tab:
 - a. Select the **Automatically update MARC holdings** check box.
 - b. Enter a **Number of most recently arrived issues to display as a note**.
8. Subscription Tab:
 - a. Verify the value of copies to receive is **2** (receive two physical copies).
 - b. Verify the number of issues is **52** (52 issues a year).
 - c. Link for Ordering/Claiming: Enter a **Fiscal Cycle** and **Vendor ID**.

9. Click **Create Control**: The Get Expected Issue Info window appears.
 - a. Verify the number of predictions you want to preview. Predict a minimum of **53**.
 - b. Enter the **Enumeration** of the first issue you want to receive.
 - c. Enter the **Chronology** of the first issue you want to receive.
 - d. Enter the **Date First Prediction**.
 - e. Enter the **Date Expected**.
10. Click **Generate Predictions**.
11. Review the prediction in the Prediction Records window.
 - If satisfactory, select **Save Prediction**.
 - If changes are needed, select **Redo Prediction**, and make the necessary changes.
12. Click the **Distribution** tab:
 - a. Click the **Modify a Distribution** tool.
 - b. Select a location other than Default in the **Holding code** drop down list.
 - c. Select the **Update MARC holdings records** check box.
 - d. Enter **1** in the **Copies expected** box. This indicates you are adding one copy to this location.
 - e. Enter **1** in the **Copies to add to catalog** box. This indicates you are adding one copy to the catalog.
 - f. Click **Modify Distribution**.
 - g. Select another location (other than default and the one selected above) in the **Holding code** drop down box.
 - h. Verify that the **Update MARC holdings records** check box is selected.
 - i. Enter **1** in the **Copies expected** box. This indicates you are adding one copy to this location.
 - j. Enter **1** in the **Copies to add to catalog** box. This indicates you are adding one copy record to the catalog.
13. Click **Create Distribution**.
14. Review the distributions in the Distributions tab. If satisfactory, select **Modify Control**.

Exercise 10: Predicting a Monthly Periodical Published during the Academic Year

The periodical began publication in September 2005. You will begin predicting issues in the first year. The issue you have in hand is Volume 1, No. 1, September 2006. The publication is not published in June, July, and August.

Create a brief item record for this title. However, if your serial title is already cataloged in SirsiDynix Symphony 3.2, adding a title will not be necessary.

TITLE: _____

1. On the Common Tasks toolbar, click the **Create Control** wizard.
2. Search for the serial title.
3. If a multi-library system, select the appropriate **Library** and **Holding code**.
4. Select the appropriate pattern template consistent with the subscription, if prompted.
5. Basic Tab:
 - a. Class Scheme: **LCPER**
6. Patterns Tab:
 - a. Verify the values in the Enumeration Pattern area.
 - b. Change the **Limit** to **9**.
 - c. Verify the values in the Chronology Pattern area. Chronology type: **Month**
 - d. Verify values in the Publication Pattern area.
 - e. Click the **Publication cycle** gadget.
 - f. Click the **Omit Issues by** helper.
 - g. Click the **Month** tab.
 - h. Select the months: **June, July, and August**.
 - i. Click **OK**.
 - j. Click **OK** for the final display.
 - k. Notice the changes to the box to the left of the Publication cycle gadget.
7. OPAC Display Tab:
 - a. Select the **Automatically update MARC holdings** check box.
 - b. Enter a **Number of most recently arrived issues to display as a note**.

8. Subscription Tab:
 - a. Verify the value of copies to receive is **1** (receive one physical copy).
 - b. Change the number of issues to **9** (nine issues will be received during the academic year).
 - c. Link for Ordering/Claiming: Enter a **Fiscal Cycle** and **Vendor ID**.
9. Distribution Tab:
 - a. Click the **Modify a Distribution** tool.
 - b. Select the **Update MARC holdings records** check box.
 - c. Enter **1** in the **Copies to add to catalog** box.
 - d. Click **Modify Distribution**.
10. Click **Create Control**. The Get Expected Issue Info window appears.
 - a. Verify the number of predictions you want to preview. Predict a minimum of **10**.
 - b. Enter the **Enumeration** of the first issue you want to predict.
 - c. Enter the **Chronology** of the first issue you want to predict.
 - d. Enter the **Date First Prediction**.
 - e. Enter the **Date Expected**.
11. Click **Generate Predictions**.
12. Review the prediction in the Prediction Records window.
 - If satisfactory, select **Save Prediction**.
 - If changes are needed, select **Redo Prediction**, and make the necessary changes.

Exercise 11: Predict a Periodical that has Cover Dates but No Volume Numbering Scheme

This is a biweekly publication. The periodical began publication in January 2006. You will begin predicting issues the first year and first month of the publication. This periodical has cover dates, but no volume numbering scheme. The issue you have in hand is Jan 2, 2006.

Create a brief item record for this title. However, if your serial title is already cataloged in SirsiDynix Symphony 3.2, adding a title will not be necessary. TITLE:

1. On the Common Tasks toolbar, click the **Create Control** wizard.
2. Search for the serial title.
3. If a multi-library system, select the appropriate **Library** and **Holding code**.
4. Select the appropriate pattern template consistent with the subscription, if prompted.
5. Basic Tab:
 - a. Class Scheme: **LCPER**
6. Patterns Tab:
 - a. Verify the values in the Enumeration Pattern area. Clear the check boxes for **V.** and **NO**.
 - b. Verify the values in the Chronology Pattern area. Chronology type: **Date**
 - c. Verify the values in the Publication Pattern area.
7. OPAC Display Tab:
 - a. Select the **Automatically update MARC holdings** check box.
 - b. Enter a **Number of most recently arrived issues to display as a note**.
8. Subscription Tab:
 - a. Verify the value of copies to receive is **1** (receive one physical copy).
 - b. Verify the number of issues is **26** (26 biweekly issues a year).
 - c. Link for Ordering/Claiming: Enter a **Fiscal Cycle** and **Vendor ID**.
9. Distribution Tab:

- a. Click the **Modify a Distribution** tool.
 - b. Select the **Update MARC holdings records** check box.
 - c. Enter **1** in the **Copies to add to catalog** box.
 - d. Click **Modify Distribution**.
10. Click **Create Control**. The Get Expected Issue Info window appears.
- a. Verify the number of predictions you want to preview. Predict a minimum of **27**.
 - b. Enter the **Chronology** of the first issue you want to predict.
 - c. Enter the **Date First Prediction**.
 - d. Enter the **Date Expected**.
11. Click **Generate Predictions**.
12. Review the prediction in the Prediction Records window.
- If satisfactory, select **Save Prediction**.
 - If changes are needed, select **Redo Prediction**, and make the necessary changes.

Exercise 12: Predict a Monthly Periodical with a Volume and Numbering Scheme but No Cover Dates

This is a monthly publication. This periodical began publication with Volume 1, Number 1, in March 1983. This periodical has a numbering scheme, but no cover dates. The issue you have in hand is Vol. 24, No. 1.

Create a brief item record for this title. However, if your serial title is already cataloged in SirsiDynix Symphony 3.2, adding a title will not be necessary.

TITLE: _____

1. On the Common Tasks toolbar, click the **Create Control** wizard.
2. Search for the serial title.
3. If a multi-library system, select the appropriate **Library** and **Holding code**.
4. Select the appropriate pattern template consistent with the subscription, if prompted.
5. Basic Tab:
 - a. Class Scheme: **LCPER**
6. Patterns Tab:
 - a. Verify the values in the Enumeration Pattern area.
 - b. Change the value in the Chronology Pattern area to Chronology Type: **Numeration**
 - c. Verify the values in the Publication Pattern area.
7. OPAC Display Tab:
 - a. Select the **Automatically update MARC holdings** check box.
 - b. Enter a **Number of most recently arrived issues to display as a note**.
8. Subscription Tab:
 - a. Verify the value of copies to receive is **1** (receive one physical copy).
 - b. Verify the number of issues is **12** (12 monthly issues a year).
 - c. Link for Ordering/Claiming: Enter a **Fiscal Cycle** and **Vendor ID**.
9. Distribution Tab:
 - a. Click the **Modify a Distribution** tool.

- b. Select the **Update MARC holdings records** check box.
 - c. Enter **1** in the **Copies to add to catalog** box.
 - d. Click **Modify Distribution**.
10. Click **Create Control**. The Get Expected Issue Info window appears.
 - a. Verify the number of predictions you want to preview. Predict a minimum of **13**.
 - b. Enter the **Numeration** of the first issue you want to predict.
 - c. Enter the **Date First Prediction**.
 - d. Enter the **Date Expected**.
11. Click **Generate Predictions**.
12. Review the prediction in the Prediction Records window.
 - If satisfactory, select **Save Prediction**.
 - If changes are needed, select **Redo Prediction**, and make the necessary changes.

Exercise 13: Predicting a Monthly Periodical using a Custom Chronology

This is a monthly publication, but two times a year a mid-month issue is also published. These mid-month issues come out in March and July. The issue you have in hand is Vol. 9, No. 10, August 2006.

Create a brief item record for this title. However, if your serial title is already cataloged in SirsiDynix Symphony 3.2, adding the title will not be necessary.

TITLE: _____

1. On the Common Tasks toolbar, click the **Create Control** wizard.
2. Search for the serial title.
3. If a multi-library system, select the appropriate **Library** and **Holding code**.
4. Select the appropriate pattern template consistent with the subscription, if prompted.
5. Basic Tab:
 - a. Class Scheme: **LCPER**
6. Patterns Tab:
 - a. Verify the values in the Enumeration Pattern area.
 - b. Verify the values in the Chronology Pattern area. Chronology type: **Custom**
 - c. Type the following in the Custom List: **JAN, FEB, MAR, MID-MAR, APR, MAY, JUN, JUL, MID-JUL, AUG, SEP, OCT, NOV, DEC**
 - d. Verify the values in the Publication Pattern area.
7. OPAC Display Tab:
 - a. Select the **Automatically update MARC holdings** check box.
 - b. Enter a **Number of most recently arrived issues to display as a note**.
8. Subscription Tab:
 - a. Verify the value of copies to receive is **1** (receive one physical copy).
 - b. Verify the number of issues is **14** (twelve monthly issues, plus two mid-month issues, per year).
 - c. Link for Ordering/Claiming: Enter a **Fiscal Cycle** and **Vendor ID**.

9. Distribution Tab:
 - a. Click the **Modify a Distribution** tool.
 - b. Select the **Update MARC holdings records** check box.
 - c. Enter **1** in the **Copies to add to catalog** box.
 - d. Click **Modify Distribution**.
10. Click **Create Control**. The Get Expected Issue Info window appears.
 - a. Verify the number of predictions you want to preview. Predict a minimum of **15**.
 - b. Enter the **Enumeration** of the first issue you want to receive.
 - c. Enter the **Chronology** of the first issue you want to receive.
 - d. Enter the **Date First Prediction**.
 - e. Enter the **Date Expected**.
11. Click **Generate Predictions**.
12. Review the predictions in the Prediction Records area.
 - If satisfactory, select **Save Prediction**.
 - If changes are needed, select **Redo Prediction**, and make the necessary changes.

Exercise 14: Creating a Serial Control Record for an Irregular Publication, and Check-in Issues

This is an irregular publication. There is no discernable pattern concerning the number of issues to be expected in a year or the way in which the volume and issues numbers are incrementing. The issue you have in hand is Vol. 7, No. 1, January 2006.

Create a brief item record for this title. However, if your serial title is already cataloged in SirsiDynix Symphony 3.2, adding the title will not be necessary.

TITLE: _____

1. On the Common Tasks toolbar, click the **Create Control** wizard.
2. Search for the serial title.
3. If a multi-library system, select the appropriate **Library** and **Holding code**.
4. Select the appropriate pattern template consistent with the subscription, if prompted. It is possible to bypass this window by clicking the **Cancel** button.
5. Basic Tab:
 - a. Class Scheme: **LCPER**
6. Patterns Tab:
 - a. In the Enumeration Pattern area, select the first two **Use** check boxes and add the **V.** and **NO.** labels using the gadget.
 - b. The **Limit** box will be left blank.
 - c. Verify the values in the Chronology Pattern area. Chronology type: **Month**
 - d. Leave the **Publication Cycle** box in the Publication Pattern area blank.
 - e. Clear the **Allow automatic prediction of issues** check box.
7. OPAC Display Tab:
 - a. Select the **Automatically update MARC holdings** check box.
 - b. Enter a **Number of most recently arrived issues to display as a note**.
8. Subscription Tab:
 - a. Verify the value of copies to receive is **1** (receive one physical copy).

- b. Leave the **Number of issues** box blank.
9. Distribution Tab:
 - a. Click the **Modify a Distribution** tool.
 - b. Select the **Update MARC holdings records** check box.
 - c. Enter **1** in the **Copies to add to catalog** box.
 - d. Click **Modify Distribution**.
10. Click **Create Control**. The Prediction Records window will not display.

Imagine that the next expected issue of the title you predicted above has arrived. To check-in the issue, follow these steps in the WorkFlows client.

1. On the Common Tasks toolbar, click the **Check In** wizard.
2. Search by periodical title for the record created above. Identify your record and click **Check In Issues**.
3. Verify that the **According to Pattern** and **Basic** options are selected.
4. Enter the volume and issue number that corresponds to the issue in hand.
5. Click **Check In** to receive the issue. On the subsequent window, click **OK**.
6. Click **Next Issue** to return to a blank window and receive another issue.
7. Display the title using the **Item Search and Display** wizard to see how the records have been updated.
8. Display the title in the OPAC to see how the holdings will display to the public.

Exercise 15: Check-in Issues, and Understand the Options for OPAC Display of Check-in Information

Imagine that the next expected issue of the title you predicted in Exercise 1 has arrived. To check-in the issue, follow these steps in the WorkFlows client.

1. On the Common Tasks toolbar, click the **Check In** wizard.
2. Search by periodical title for the record created in Exercise 1. Identify your record and click **Check In Issues**.
3. Imagine that you compare the “issue in hand,” with the information displayed by SirsiDynix Symphony 3.2, and they match. Click **Check In Now** to receive the issue.
4. On the resulting window, click **Close**.

View the record using the **Item Search and Display** wizard to see how receiving updated the records.

1. On the Common Tasks toolbar, click the **Item Search and Display** wizard.
2. Search by periodical title for the record you created in Exercise 1. Identify your record and click **Detailed Display**.
3. Click the **Bibliographic** tab and note the display of the Recently Arrived Note (599 field).
4. Click the **MARC Holdings** tab and note the listing of a MARC Holdings record.
 - a. Select the holdings record and click **Display Holdings** to view the MARC Holdings record.
 - b. Note the appearance of an 863 field for each issue checked in.
 - c. Click **Close** to close the MARC Holdings record.
5. Click the **Call Number/Item** tab and note the appearance of a call number and copy for each issue checked in. Copies are only created if you placed a number greater than zero in the **Copies to add to catalog** box on the Distribution tab.

View the record in the OPAC to see how the holdings display to the public.

1. Open a Web browser and point to your OPAC (iBistro or iLink).
2. Search by periodical title for the record you created in Exercise 1. Identify your record and click **Details**.
3. Notice the MARC Holdings display showing a range of issues held.
4. Notice the copy level holdings reflecting each individual issue received. If copy records were not generated, this portion of the display will not be present.
5. Notice the Recently Arrived note in the bibliographic display (Catalog Record tab).

Exercise 16: Check-in Issues with Special Instructions

Imagine that the next expected issue of the title you predicted in Exercise 2 has arrived. To check-in the issue, follow these steps in the WorkFlows client.

1. On the Common Tasks toolbar, click the **Check In** wizard.
2. Search by periodical title for the record created in Exercise 2. Identify your record and click **Check In Issues**.
3. A Special Instructions window will display the note you entered in the control record in Exercise 2. Click **OK**.
4. Imagine that you compare the “issue in hand,” with the information displayed by SirsiDynix Symphony 3.2, and they match. Click **Check In Now** to receive the issue.
5. On the resulting window, click **Next Issue**.
6. Receive several more issues.
7. Display the title using the **Item Search and Display** wizard to see how the records have been updated.

Exercise 17: Check-in Issues Out of Sequence

You are going to receive issues that were predicted in Exercise 4. The following issues have arrived: June 1, 2006 (18:129), June 2, 2006 (18:130), June 3, 2006 (18:131) and June 5, 2005 (18:132) and June 6, 2006 (18:133) have not arrived..

1. On the Common Tasks toolbar, click the **Check In** wizard.
2. Note your options for searching for an item.
 - a. Search by periodical title for the record created in Exercise 4.
 - b. Identify your record and click **Check In Issues**.
3. On the Next Issue tab, this information describes the issue that SirsiDynix Symphony 3.2 expects to be checked in next.
 - a. Imagine that you compare the “issues in hand,” with the information displayed in SirsiDynix Symphony 3.2, and they match.
 - b. Click **Check In Now** to receive the issue. (Issue 18:129)
 - c. Click **Next Issue**.
 - e. Receive two more issues (Issue 18:130 and 18:131).
 - f. After three issues have been checked-in, click **Close**.
4. Two issues have not arrived: Issues 18:132 and 18:132.
5. Issue 18:134 has arrived.
 - a. Click the **Check In** wizard.
 - b. Click **Different Issue**.
 - c. Highlight the issue Vol. 18, No. 134 (June 7, 2006).
 - d. Click **Selected Issue**.
 - e. Verify the issue to be checked in. You may want to enter a receipt note. Click **Check In**.
 - f. On the resulting window, click **Close**.
 - g. Display the title using the **Item Search and Display** wizard to see how the records have been updated.

Exercise 18: Check-in Multiple Copies of an Issue when You Receive Fewer than Expected Copies

In Exercise 9, you created a serial control record for two subscriptions that are to be processed centrally but distributed to two different libraries. With the next expected issue, however, you only receive one copy.

1. On the Common Tasks toolbar, click the **Check In** wizard.
2. Search for the title you created in Exercise 9.
3. The Next Expected Issue Tab appears.
 - a. Click **Different Copies**.
 - b. Two copies are expected.
 - c. Change the number in the **Number Received** box to **1** and click **OK**.

Note SirsiDynix Symphony 3.2 will attempt to distribute the multiple received copies as evenly as possible to multiple locations. If you prefer staff make the decision about which library will receive the one copy, your administrator can turn off the **Auto Distribute Partially Received Issues** option by right clicking on the **Check In** wizard, selecting **Properties**, and going to the **Behavior** tab.

Exercise 19: Check-in a Duplicate or Replacement Issue

You have received a replacement issue for the serial control record created in Exercise 1. The replacement issue is Vol. 1, No. 1, January 2005.

1. On the Common Tasks toolbar, click the **Check In** wizard.
2. Search by periodical title for the record created in Exercise 1.
3. On the Next Issue tab, this information describes the issue that SirsiDynix Symphony 3.2 expects to be checked in next.
 - a. You have the replacement issue “in hand.”
 - b. Click **Different Issue**.
 - c. Click **Special Issue**.
 - d. Verify that **According to Pattern** option is selected.
4. Prediction Information Box:
 - a. Enter the enumeration of the issue: **V. 1 NO. 1**
 - b. Where you are prompted for **Chronology**, enter the chronology of the issue along with the designation **DUP** (for duplicate issues) or **REP** (for replacement) issues: **JAN 2006 REP**
 - c. Click **Check In**.

Exercise 20: Check-in Unpredicted Special Issues, Supplements, or Indexes

You have received a special issue for the serial control record created in Exercise 3.

1. On the Common Tasks toolbar, click the **Check In** wizard.
2. Search by periodical title for the record created in Exercise 3.
3. On the Next Issue tab, this information describes the issue that SirsiDynix Symphony 3.2 expects to be checked in next.
 - a. You have a special issue “in hand.”
 - b. Click **Different Issue**.
 - c. Click **Special Issue**.
4. Prediction Information:
 - a. Select the **Special** option.
 - b. Select the **Basic** option.
 - c. Enter **Enumeration** information about the issue being received: **Special Issue**
 - This information will appear in the 866 field of the MARC Holdings.
 - This information will appear in the 599 field of the bibliographic record.
 - d. Receipt Comment: Enter some information concerning the receipt of this issue: **Keeping this issue although it was not expected**.
5. Click **Check In**.

You have received an Index for the serial control record created in Exercise 3.

1. On the Common Tasks toolbar, click the **Check In** wizard.
2. Search by periodical title for the record created in Exercise 3.
3. On the Next Issue tab, this information describes the issue that SirsiDynix Symphony 3.2 expects to be checked in next.
 - a. You have the index “in hand.”
 - b. Click **Different Issue**.
 - c. Click **Special Issue**.
4. Prediction Information:
 - a. Select the **Special** option.
 - b. Select the **Index** option.
 - c. Enter **Enumeration** information about the index being received: **Index 2006**.
 - This information will appear in the 868 field of the MARC Holdings.
5. Click **Check In**.

Exercise 21: Check-in Combined Issues

This is the weekly publication you created in Exercise 2. Without notice, Volume 67, Numbers 5 and 6 were received as a combined issue. Check-in this issue as a combined issue.

1. On the Common Tasks toolbar, click the **Check In** wizard.
2. Search for the title you created in Exercise 2.
3. The Next Expected Issue tab appears. Click **Different Issue**.
4. A list of expected issues appears. Click **Combine Issues**.
5. Select the **Combine** boxes next to Volume 67, NO. 5 and 6.
6. Click **Combine Issues**.
7. Verify the **Enumeration, Chronology, and Number expected** and **Number received**.
8. Edit the **Receipt comment** box, indicating that these are combined issues. (This is optional.)
9. Click **Check In**.

Exercise 22: Change a Publication Pattern

The serial control record that you created in Exercise 1 is changing from a Monthly Publication to a Weekly Publication after Volume 1, No. 3, March 2006. This exercise walks you through the process of changing a serial control record when a publication pattern changes.

1. On the Common Tasks toolbar, click the **Modify Control** wizard.
2. Search for the serial title used in Exercise 1.
3. Expected Tab:
 - a. Click the **Delete Prediction(s)** tool.
 - b. Select the **Remove All Predictions** check box.
 - c. Click **Delete Predictions**.
 - d. Click **OK** to confirm.
4. Patterns Tab:
 - a. Click the **Replace Patterns** helper.
 - b. Select the new pattern: **Weekly**
 - c. Click **Replace Patterns**.
5. Subscription Tab:
 - a. Verify the copies to receive is **1** (receive one physical copy).
 - b. Change the number of issues to **52** (52 weekly issues a year).
6. Expected Tab:
 - a. Click the **Generate Predictions** helper.
 - b. Preview **52** expected issues.
 - c. Enter the volume (**V.**) to be received next: **1**
 - d. Enter the number (**NO.**) to be received next: **4**
 - e. Enter the **Chronology** of the next issue to be received.
 - f. Enter the **Date First Prediction**.
 - g. Enter the **Date Expected**.
 - h. Click **Generate Predictions**.
 - i. Verify the chronology and enumeration to receive. If satisfactory, select **Save Prediction**.
7. Check-in some issues.

Exercise 23: Add a Routing List to a Publication

You have been asked to add a routing list to one of the copies that you created in Exercise 9. The routing list will consist of at least three users.

1. On the Common Tasks toolbar, click the **Modify Control** wizard.
2. Search for the serial title created in Exercise 9.
3. Click the **Routing** tab.
4. Click the **Create A Routing** tool.
5. Determine the **Copy** to be routed.
6. Determine the **Library** to be routed from.
7. Use the User Lookup gadget to select the **User ID** to add to the routing list.
8. Determine the **rank** of the routing. (1=highest)
9. Click **Create Routing**. The routing list appears.
10. Repeat steps 4 – 9 until your list consists of at least three users.
11. When complete, click **Close**.

Exercise 24: Remove Received Issues

By mistake, you accidentally checked in one copy too many of the periodical you created in Exercise 4. You must remove a Received Issue through the Modify a Serial Control wizard. If MARC holdings were created, they must be corrected manually through the Modify a Serial Control wizard. If copies were created, they must be removed through the Delete Title, Call Numbers or Items wizard. Edit the Recently Arrived notes through the Modify Title wizard.

1. On the Common Tasks toolbar, click the **Modify Control** wizard.
2. Search for the serial title you created in Exercise 4.
3. Click the **Received** tab.
4. Click the **Unreceive Issue(s)** tool.
5. Select the check box next to the last issue you checked in, and make note of its enumeration and chronology.
6. Click **Unreceive Issue(s)**. This issue becomes “unreceived” from the Received tab, and displays again in the Expected tab.

Note To permanently remove the issue, it must be removed from the Expected tab.

7. You will be prompted with a message that informs you of the issue(s) you are unreceiving. You will also be informed that MARC holdings (if created) need to be corrected manually. In addition, you will be informed that copies (if created) need to be removed before receiving the issues again. Click **OK**.
8. To manually remove MARC holdings, click the **MARC Holdings** tab in the **Modify a Serial Control** wizard.
 - a. Click the **Location** platform of the MARC holdings record you want to modify.
 - b. Insert the mouse pointer in the **863 Holdings** box that corresponds with the issue you just unreceived.
 - c. Click the **Delete the current field** helper. The 863 field disappears.
 - d. Click **Save and Close**.

9. To remove copies, if copies were created when issues arrived, click the **Delete Title, Call Numbers or Items** wizard. (This wizard is located on the Cataloging Title Maintenance toolbar.)
 - a. Search for the title, or select the **Current** title if one displays.
 - b. Select the check box next to the issue that you unreceived.
 - c. Click **Delete**.
 - d. Click **Close**.
10. To edit the Recently Arrived notes, which were created at check-in, click the **Modify Title** wizard. (This wizard is also located on the Cataloging Title Maintenance toolbar.)
 - a. Search for the title, or select the **Current** title if one displays.
 - b. Select the 599 field that contains the information about the issue you just unreceived.
 - c. Delete the enumeration, chronology, and date that correspond with the issue you have just unreceived.
 - d. Click **Save**.

Appendix D – Additional Activities

Add catalog titles, create serial control records and check-in issues using the following information.

1. Title: **Journal of the West**
ISSN: **0022-5169**
Frequency: **Quarterly.**
Next expected Issue: **Vol 43, No. 4, Fall 2006**
2. Title: **Education Index**
ISSN: **0013-1385**
Frequency: **Monthly except July and August with a bound cumulation each year.**
Next expected Issue: **Vol. 77, No. 7, March 2005**
3. Title: **New York Times Up Front**
ISSN: **1525-1292**
Frequency: **Biweekly in January, February, March, September, and November. Monthly in April, May, October, and December. Fourteen issues.**
Next Expected Issue: **Vol. 138, No. 11, March 6, 2006**
4. Title: **New Mobility**
ISSN: **1086-4741**
Frequency: **Monthly.**
Next Expected Issue: **Vol. 17, Issue 152, MAY 2006 (continuous numbering)**
5. Title: **Hispanic**
ISSN: **0898-3097**
Frequency: **Monthly except bimonthly January/February and July/August.**
Next Expected Issue: **March 2006**

6. Title: **Nature**
ISSN: **0028-0836**
Frequency: **Weekly on Thursday, except the last week in December.**
Next Expected Issue: **Vol. 437, Issue No. 7100, July 20, 2006**
7. Title: **Beverage World**
ISSN: **0098-2318**
Frequency: **Thirteen issues a year, monthly plus the annual DataBank issue.**
Next Expected Issue: **Vol. 125, No. 3, March 15, 2006**
8. Title: **Teaching Children Mathematics**
ISSN: **1073-5836**
Frequency: **Monthly except June, July, and August.**
Next Expected Issue: **Vol. 12, No. 7, March 2006**
9. Title: **Body & Soul**
ISSN: **1539-0004**
Frequency: **Bimonthly with additional special issues published each spring and fall.**
Next Expected Issue: **Vol. 130, No. 5, March 2006**
10. Title: **Potpourri**
ISSN: **1076-6413**
Frequency: **Quarterly.**
Next Expected Issue: **Vol. 15, No. 4**
11. Title: **Chemical Market Reporter**
ISSN: **0090-0907**
Frequency: **Weekly except for combined issues during the first and last two weeks of July and the last two weeks of August and December.**
Next Expected Issue: **Vol. 266, No. 15, April 10, 2006**
12. Title: **The People**
ISSN: **0199-350X**
Frequency: **Bimonthly.**
Next Expected Issue: **Vol. 119, No. 6, March-April 2006**

13. Title: **The Kansas City Star**
ISSN: **0745-1067**
Frequency: **Daily.**
Next Expected Issue: **April 25, 2005**
14. Title: **The Nation**
ISSN: **0027-8378**
Frequency: **Weekly except for the second week in January, and biweekly the fourth week of July through the third week of September.**
Next Expected Issue: **August 7, 2006**
15. Title: **Time**
ISSN: **0040-781X**
Frequency: **Weekly except for two issues combined at year-end.**
Next Expected Issue: **August 21, 2006**

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