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Introduction

The Serials Control training guide is designed to provide a basic understanding of the capabilities of the SirsiDynix Symphony Serial Control module with an overview of navigating those functions in the WorkFlows client.

Topics include creating, modifying, displaying, and removing serial control records, set up serial predictions, receive issues, configure and display serial holdings in the OPAC, route issues and claim issues.

This guide can accompany instructor-led training. It can also be used as review, reference or an independent study document.

The Serials Control training guide comprises ten sections and six appendices. Below is a short summary of each:

- **Overview.** Discusses the different records involved in the Serial Control module.
- **Vendor Records.** Details how to create, modify, display, duplicate, delete and deactivate vendor records.
- **Serial Control Records.** Outlines the steps to creating a serial control record and the information within many of the tabs.
- **Creating Predictions.** Details the steps taken to create predictions based on pattern information in the serial control record.
- **Checking In and Working with Serial Issues.** Reviews the process of checking in serial issues including issues out of order, supplements, indexes, and combined issues.
- **e-Library Display Options.** Details the steps taken to configure serial display options, such as recently arrived issues, volume holdings, and/or MARC holding information.
- **Claiming Issues.** Reviews the process of claiming issues manually and with reports.
- **Additional Serial Wizards.** Discusses additional serial control wizards that allow staff to view, modify, and remove records.
- **Routing and Binding.** Outlines the steps taken to create routing lists for serial titles and indicate specifics about a title for which you want to have bound.
- **Centralized Serial Control.** Details the steps taken to create multiple-distribution serial control records and checking in all or partial shipments of serial issues.
Appendix A: Serial Reports. Discusses a few of the Serial reports available for listing serial control records, serial predictions, control records not linked to a vendor, and control records without predictions.

Appendix B: Serial Control Properties and Configuration. Reviews the creation and modification of serial control policies, such as control categories, claim reasons, serial patterns, and labels.

Appendix C: Printing Functionality. Discusses how to print serial information such as routing slips and spine and pocket labels.

Appendix D: Chronology Types. Displays the format of the date as they should be entered when creating predictions in the Serial Control module.

Appendix E: Calendar Guides. Contains a set of calendars to assist with creating predictions in the Serial Control module.

Appendix F: Serial Control Practice Exercises.

Using This Training Guide

This guide has been designed for use during a SirsiDynix instructor-led training. It also has been designed to be used as a reference work for the class. Icons are used throughout the manual for different purposes. The purpose of each icon is described below.

This icon denotes additional helpful information.

This icon is a warning. Pay special attention to this information!

This icon indicates reference information available in another manual or to another chapter within this manual.

This icon directs you to the SirsiDynix Symphony online Help file where you can find additional or related information.
Help Files

The SirsiDynix Symphony system comes with an extensive set of online Help files. Every toolbar in your SirsiDynix Symphony system has a Help icon (a purple book with a yellow question mark on it). You can access Help files through the toolbar icon, from the Help option on your menu bar, or by pressing the F1 key when within SirsiDynix Symphony.

Help files are organized either context sensitive to the screen presently displaying, or topically through a table of contents:

The Help File screen has been divided into three parts for explanation:

- Icons are available to move forwards and backwards through the Help topics, to print, to access an index, and to search.
- Information is organized topically in the left-hand window. Click on a plus sign (+) to open a folder; click on a minus sign (-) to close it.
- The Help file is presented in the right-hand window. The information in the Help file assists in understanding more about software functionality and how to perform relevant workflows.

When you need help with a task, consult the online Help Files first. Your online Help Files are a comprehensive information set of SirsiDynix Symphony WorkFlows.
Overview

The Serial Control module manages the status and receipt of the serial collection in your library. It contains publication pattern information so that SirsiDynix Symphony can predict issues. It helps automate the claiming process for the library. Serial control records keep track of what you have received and can display this information to staff and patrons.

In this section you will learn to:

- Understand the record relationships within the Serial Control module.

Record Types

SirsiDynix Symphony’s Serials Control module uses the following types of information to manage serials: title records, serial control records, prediction records, receipt records, claim records, and routing records.

Vendor/Order Record

If you link to vendors through orders, you may also need to create the order. To claim serials with WorkFlows reports, the record must be linked to vendors.

Title Record

To place a title under serial control it must first have a title record in the catalog. It may be a full MARC record or a brief title with the format of SERIAL so that the Frequency Code fixed field will appear. When this record exists, the receipt of each copy of each issue for the title can be monitored.

Serial Control Record

The serial control record contains publication pattern information so that SirsiDynix Symphony can predict issues. It can link to either the order or vendor record to help the library automate the claiming process. The control record keeps track of what you have received and can display this information to staff and patrons. It provides e-Library display options.

Prediction Record

A prediction record is linked to the serial control record and represents each expected issue. Prediction is necessary for claiming.
Receipt Record

Receipt records are created by predictions that are received or can be created individually at the time they are received. 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 are in association with the prediction record. These records are created if the predicted copy is not received by the date to claim, if multiple predicted copies have only been partially received, or if one is created by library staff for other reasons like “damage.”

Routing Record

Routing lists are contained in routing records associated with the control record. You may print routing lists for individual copies at the time of receipt.
Vendor Records

Before you begin using the Serial Control module you may need to define or identify vendor information. Vendor records are shared with the Acquisitions module, if your library has this module. Each vendor cycle must be identified by a fiscal cycle that specifies the chronological period to which this vendor cycle belongs. You will need vendor records if your library will issue claims for damaged or late items.

In this section you will learn to:

- Establish vendor session settings.
- Add vendor records.
- Modify vendor records.
- Duplicate vendor records.
- Review and display vendor records.
- Delete or deactivate vendor records.

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. The Maintenance and Display libraries will determine the serial control records with which staff can work and view.

The window that displays is the Session Settings wizard that appears in the Acquisitions toolbar.
The following Session Preferences are required:

- **Maintenance Library** - select the library whose vendor information you have permission to modify. The options that appear are established in policies.

- **Display Library** - select the library whose vendor information you have permission to display. The options that appear are established in policies.

For further information about maintenance and display libraries, refer to the WorkFlows online Help topic “FAQs: Understanding Display and Maintenance Libraries.”

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

If the session settings window does not appear, the system administrator will need to add the Session Settings wizard to the Serial Control toolbar.
Adding a Vendor Record

The Add Vendor wizard lets you enter and track vendor information for those you will be purchasing titles from. There is no limit to the number of vendors that can be added to the system. If you have multiple customer accounts with a single vendor and are assigned different account numbers for each account, you may want to create a separate vendor record to represent each account.

To add a vendor record:

1. Open the Vendors group of wizards and click the Add Vendor wizard.

2. In the New ID field, type a new vendor ID (up to 20 characters). This is a required field.

   **Vendor IDs must not contain spaces!**

3. In the Name field, enter the vendor name (up to 70 characters). This field is optional.

4. In the Customer Number field, enter the account number that the vendor has assigned your library or library contract (up to 20 characters). This field is optional and searchable.

5. Enter the Currency of the vendor if it is different from your library’s native currency.

6. Select policies from the Group drop downs to further categorize this vendor. These groups provide optional information used for reporting and act like demographics.
7. Click the **Vendor Extended Information** tab.

8. Enter any necessary notes or comments about this vendor.

9. Click the **Addresses** tab.

10. Enter the vendor address information using the fields that are available. Three mailing addresses are available for separate ordering, service, and accounting vendor locations. The fields that display in this tab are established by system administrators in Vendor Configuration.
11. Click Create Vendor.

The **EDI Address** tab is used for libraries that have purchased the Electronic Data Interchange Module which allows them to communicate with vendors to transfer ordering, invoicing or subscription information between computers. To read more about EDI, refer to the WorkFlows online Help file “Getting Started with EDI.”
Modifying a Vendor Record

The Modify Vendor wizard lets you change or add information to the vendor record or vendor cycle record. You can only modify one vendor cycle record at a time. Therefore if you have multiple fiscal cycles attached to a vendor, you must search for the vendor in each fiscal cycle that you want to modify.

To modify a vendor record:

1. Within the Vendors group of wizards, click the Modify Vendor wizard.

2. Using the Index drop down, select the index you want to use to search for the vendor, enter your information in the Search For field and click Search. (You can leave the Search For field empty and click Search to retrieve a list of all vendors for that fiscal cycle and library.)

3. If more than one record matches your search, double-click the vendor or highlight it and click Modify This Vendor.

4. Make any changes necessary in the available tabs and click Modify This Vendor.

5. Once your changes have been made, select one of the following:
- Modify Another Vendor to modify a different vendor or vendor cycle.
- Return to List to return to the list of vendors.
- Close to exit the wizard.

**Duplicating a Vendor Record**

The *Duplicate Vendor* wizard lets you copy existing vendor information into a new vendor record. Therefore, if you have multiple vendor accounts that require separate vendor records, this is a quick and easy way to duplicate core vendor information and not have to retype all of the same information.

**To duplicate a vendor record:**

1. Within the Vendors group of wizards, click the *Duplicate Vendor* wizard.

   ![Duplicate Vendor Wizard](image)

2. Using the Index drop down, select the index you want to use to search for the vendor, enter your information in the Search For field and click **Search**. (You can leave the Search For field empty and click **Search** to retrieve a list of all vendors for that fiscal cycle and library.)

3. If more than one record matches your search, double-click the vendor or highlight it and click **Duplicate This Vendor**.

4. In the New ID field, type in a new vendor ID (up to 20 characters. This is a required field.)
Vendor IDs must not contain spaces!

5. In the Name field, change the Vendor Name.

6. Make any necessary changes in the available tabs.

This wizard duplicates basic vendor information, addresses, and extended information; however, vendor cycle information is not duplicated, even though you have searched by vendor cycle.

7. Click Duplicate This Vendor.

8. Click Duplicate Another Vendor if you want to create another vendor from an existing vendor record or click Close to exit the wizard.
**Reviewing and Displaying Vendor Information**

Vendor information can be viewed in the following wizards:

- Review All Vendors
- Display Vendor (All Cycles)
- Display Vendor (Specific Cycle)

When reviewing or displaying vendor record information, the data cannot be edited. You can, however, see financial, averages, and quantity data in various formats.

**Reviewing All Vendors Wizard**

The *Review All Vendors* wizard lets you review amounts, averages, and quantities of orders associated with a specific vendor within a fiscal cycle. The information you review can also be output into a file on your workstation using specific helpers available in the *Review All Vendors* wizard.

**To review vendor records:**

1. Within the Vendors group of wizards, click the *Review All Vendors* wizard.

2. Using the Index drop down, select the index you want to use to search for the vendor, enter your information in the Search For field and click **Search**. (You can leave the Search For field empty and click **Search** to retrieve a list of all vendors for that fiscal cycle and library.)
3. To review all selected vendors, select the Browse search type, leave the Search For field blank, and click Search.

4. Click the Select All check box or select the boxes next to the vendors you want to review.

5. Click Review Selected Vendors.

6. Once you have reviewed the vendor information, choose one of the following:
   - Return to Vendor List, if displayed, to return to the list of searched vendors.
   - New Search to start a new vendor search.
   - Close to exit the wizard.
Displaying All Cycles of a Vendor

The Display Vendor (All Cycles) wizard lets you display a summary of a single vendor record, summarize and total all cycles of a single vendor, and display a brief summary of multiple vendor records.

To see all cycles of a vendor record:

1. Within the Vendors group of wizards, click the Display Vendor (All Cycles) wizard.

2. Using the Index drop down, select the index you want to use to search for the vendor, enter your information in the Search For field and click Search. (You can leave the Search For field empty and click Search to retrieve a list of all vendors for that fiscal cycle and library.)

3. If more than one record matches your search, double-click the vendor or highlight it and click Display This Vendor.
4. After viewing the vendor record information, choose one of the following:

- **Display Another Vendor** to search another vendor.
- **Return to Vendor List** to return to the list of searched vendors.
- **Close** to exit the wizard.

**Displaying a Specific Cycle of a Vendor**

The *Display Vendor (Specific Cycle)* wizard lets you display all vendor record information including orders and linked serial control records for a selected vendor in a specified fiscal cycle.

**To display a specific cycle of a vendor:**

1. Within the Vendors group of wizards, click the *Display Vendor (Specific Cycles)* wizard.

2. Using the Index drop down, select the index you want to use to search for the vendor, enter your information in the Search For field and click **Search**. (You can leave the Search For field empty and click **Search** to retrieve a list of all vendors for that fiscal cycle and library.)

3. If more than one record matches your search, double-click the vendor or highlight it and click **Display This Vendor**.

4. To see orders associated with this vendor for the displayed fiscal cycle, click the **Orders** tab.
5. After viewing the vendor record information, choose one of the following:

- **Display Another Vendor** to search another vendor.
- **Return to Vendor List** to return to the list of searched vendors.
- **Close** to exit the wizard.

### Adding a Vendor Cycle

The *Add Vendor Cycle* wizard is used to add budget cycle information to an existing master vendor record. If you use the Acquisitions module, this step is usually done in batch toward the end of each fiscal year. This wizard will be used mostly by those who do not use the Acquisitions module and will need to keep track of vendor records specifically for the Serial Control module.

**To manually rollover a vendor record:**

1. Within the Vendors group of wizards, right-click on the *Add Vendor Cycle* wizard and select **Properties**.

2. Type in the new fiscal cycle into the New Fiscal Cycle field if the one you need is not in the drop down.
3. Click OK to save your changes.

If you do not enter the fiscal cycle in the properties of the Add Vendor Cycles wizard, the following message will appear:

4. Click the Add Vendor Cycle wizard.

5. Search for the vendor record that you want to rollover and click Add Vendor Cycle.

6. Enter Order claim and cancel periods.
7. Click Add Vendor Cycle to save the new cycle.

8. Click Close.

**Deleting a Vendor Record**

The Delete Vendor wizard lets you remove a single vendor cycle from an existing vendor record or remove a vendor record and all vendor cycles. In most cases the Delete Vendor wizard is used to remove vendors that were added to the system but have never been used or vendors that have not been used for an extended period of time and the library has no intention of using that vendor in the future.

To delete a vendor record:

1. Within the Vendors group of wizards, click the Delete Vendor wizard.

2. Using the Index drop down, select the index you want to use to search for the vendor, enter your information in the Search For field and click Search. (You can leave the Search For field empty and click Search to retrieve a list of all vendors for that fiscal cycle and library.)

3. If more than one record matches your search, double-click the vendor or highlight it and click Remove Vendor/Cycles.

4. Select the Remove Vendor and All Cycles radio button to remove the fund and all of the vendor cycles. Or select the Remove Selected Cycles radio button and click in the box the vendor cycles to remove.
Only fiscal cycles eligible for removal display a Remove check box. Vendors attached to orders and/or invoices are ineligible for removal even if the status of the order is “complete.” To delete vendors that are attached to orders or invoices, you must first delete the order(s) and/or invoice(s), then you may proceed in deleting the vendor.

5. Click **Remove Vendor/Cycles**.

6. Click **Yes**.

7. Click **OK**.

8. Click **Remove Another Fund** to remove another fund or click **Close** to exit the wizard.
Serial Control Records

The *Create Control* wizard guides you through the process of adding a new control record and predicting issues. Each serial title may have one or more linked control records. A control record maintains basic information about the serial title to be checked in, and is used as the basis for generating predictions.

In this section you will learn to:

- Create a control record.
- Understand the information in the **Basic** tab.
- Understand the information in the **Patterns** tab.
- Understand the information in the **Subscription** tab.
- Understand the information in the **Extended Info** tab.

**Serial Control Record**

Once you have searched for the serial title you want to place under serial control, there are several fields to fill in to link the title in the catalog and any issues received for that title.

Information is organized by tabs in the Serial Control record. You will want to be familiar with the way this information is organized. In this section you will go through each tab, noting those fields that are applicable to your library.

**To create a serial control record:**

1. Within the Common Tasks group of wizards, click the *Create Control* wizard.

2. Click the Index drop down and select the index by which you choose to search. The index you prefer to search by can be set as the default in the properties of the wizard.

3. Type in your search terms in the Search for field and click **Search**.

4. If more than one record matches your search, select the one you want and click **Create Control**.

5. If you are creating records for a multi-library system and if the properties of the wizard are selected to prompt for library when
creating a control record, the Library for New Control window appears.

6. In the Library box, select a library that will receive the issues.

7. 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. The holding code is very important when libraries create item records for their serials upon checking them in or if MARC holdings are updated. Even if you are not creating items upon check in, the holding code is required.

8. Click OK.

The Select a Pattern Template may appear if there is not a code in the Frequn field of the catalog record. Click the Pattern Template for this record and click OK.
Basic Tab

1. Type a unique ID into the New Control ID box. 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.
2. Type in the SISAC ID if necessary. This contains the title’s ISSN in the form of 9999-1111. This ISSN comes from the MARC record.

3. Type in the Vendor Title #, if necessary. This is 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.

4. Change the Base call number if necessary. The base call number is the call number of the item with which the serial control is associated. This is most significant to libraries that will be barcoding their issues for circulation. As issues are received, item copies may be automatically added to the collection under one base call number, i.e. KF4119.A2 S38 V.187 NO. 4, KF4119.A2 S38 V.187 NO. 5, etc.

5. Change the Class scheme to LCPER or DEWEYPER. This affects how the serial issue records appear in the OPAC. 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. Again, this is most significant to libraries that will be barcoding their issues for circulation.

6. Type in the Subscription ID. 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.

7. If necessary, select a Status for the serial title. 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.
8. If necessary, fill in values for the Category 1 and Category 2 boxes. Use these boxes for demographic reporting. These are “controlled vocabulary” boxes so you must choose an option from the list. These are also policies created in SirsiDynix Symphony by the system administrator.

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 the number of days to wait before claiming. The information that appears in this tab is based on the Frequency code found in the fixed fields in the MARC record or what you chose in the Select a Pattern window.

1. Click the Patterns tab of the serial control record.

2. The Label boxes provide abbreviations for the selected enumeration pattern. The Limit box determines the number of pieces per volume. For example, if the serial title is V. 25 No. 11, and if there are 12 issues in the subscription, after that twelfth issue, the volume number will change.
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.

3. If the Chronology type is incorrect, select the correct one from the drop down. This tells Symphony how to format the date for the serial. 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 219.

4. The Allow Automatic Prediction of Issues box allows you to indicate whether you want the system to prompt you to generate prediction records upon creating a serial control record and in the check in process. If you clear this box, SirsiDynix Symphony will not prompt you to create prediction records. We will discuss this in more detail later.

5. The Publication cycle data is in an abbreviated alphanumeric format for the serial title and its control record. This gadget can be used to change the day a title is published and omit issues from the predictions that will be made for the title.

6. Adjust the value in the Days to wait before claiming fields if necessary. The Days to wait before claiming box contains the number of days the system waits before marking an unreceived issue for claiming. If you do not want to use report-driven claiming in Symphony because you use a different method to do this, type 0 (zero) in this box.
**Subscription Tab**

The information in this tab creates a link to the vendor and allows for automatic claiming of serials. It also specifies the number of copies expected and the serial expiration date.

1. Click the **Subscription** tab of the serial control record.

![Subscription Tab](image)

2. Change the value in the Copies to Receive field if necessary.

3. The Number of Issues field contains the number of expected issues in one subscription. This value typically is the same as the number in the Limit box of the **Patterns** tab. This is also the number of issues you will find when generating predictions after you create the control record.

4. Click the Expiration Date gadget to select a date that the subscription will end. This date can be used in reports to create lists of subscriptions about to expire.

5. To facilitate automatic claiming in SirsiDynix Symphony, select the correct fiscal cycle from the Fiscal Cycle drop down. The fiscal cycle must be a valid cycle used by the vendor ID.

6. Also, click the Vendor ID gadget, select the correct vendor from the list and click **OK**.
The Order ID field 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 field determines where an item is held and where the user is registered in a multi-library setting.

The Line Item field 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. For instructions on how to add order history, refer to page 138 of this training guide.

Extended Info Tab

Use the three fields on the Extended Info tab to provide additional information about the serial. They will appear at the point of check in under “Special Instructions.”

1. Click the Extended Info tab of the serial control record.
2. Enter any notes for this serial title.

The PHYSFORM field describes the physical form, medium, or types of material. For example, you may receive the paper edition and also the microfiche or microfilm format of a periodical.

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

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

**Get Expected Issue Info**

1. Once all of the information has been entered, click **Create Control**.

2. In the Get Expected Issue Info window, if you want to generate predictions for more than a year, change the Preview expected issues starting with value.

3. Type the volume and number of the next expected issue in V. and NO boxes.

4. Type in the Chronology which is directly related to the Chronology type in the **Patterns** tab.
5. Type or use the Date First Prediction gadget to enter a date. Workflows uses this start date to calculate the date expected for each 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.

6. Type or use the Date Expected gadget to enter a date you expect to receive this issue.

7. Click Generate Predictions.

8. Click Save Prediction if the list looks satisfactory. If it does not, click Redo Prediction, change the information, and click Generate Predictions again.

9. Click OK.

10. Click OK.
Creating Predictions

Once the basic information for the serial control record is entered, predictions can be generated. The pattern template used by the serial control record varies from serial title to serial title. Some periodicals are weekly, others quarterly, etc. Many serials will be published in an irregular pattern. For example, you may receive a magazine that is published monthly and another that is published monthly but combines January/February and June/July. The Patterns tab of the serial control record will establish the correct information for that title in order to facilitate the predictions of its issue.

In this section you will learn to:

- Create predictions for a monthly publication.
- Create predictions for a weekly publication.
- Create predictions for a bimonthly publication.
- Create predictions for a quarterly publication.
- Create predictions for an annual publication.
- Create predictions for a publication without labels.
- Create predictions for a publication with omissions.
- Create predictions using continuous numbering.
- Create predictions one at a time.

Appendix F contains exercises with additional publication patterns.
**Working with Patterns and Creating Predictions**

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 patterns:

<table>
<thead>
<tr>
<th>Pattern Templates</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>3INMONTH</td>
<td>Three issues per month</td>
</tr>
<tr>
<td>3INWEEK</td>
<td>Three issues per week</td>
</tr>
<tr>
<td>3INYEAR</td>
<td>Three issues per year</td>
</tr>
<tr>
<td>ANNUAL</td>
<td>Annual</td>
</tr>
<tr>
<td>BIENNIAL</td>
<td>Every two years</td>
</tr>
<tr>
<td>BIMONTHLY</td>
<td>Every two months</td>
</tr>
<tr>
<td>BIWEEKLY</td>
<td>Every two weeks</td>
</tr>
<tr>
<td>DAILY</td>
<td>Daily</td>
</tr>
<tr>
<td>MONTHLY</td>
<td>Monthly</td>
</tr>
<tr>
<td>QUARTERLY</td>
<td>Quarterly</td>
</tr>
<tr>
<td>SEMIANNNUAL</td>
<td>Two issues per year</td>
</tr>
<tr>
<td>SEMIMONTH</td>
<td>Two issues per month</td>
</tr>
<tr>
<td>SEMIWEEKLY</td>
<td>Two issues per week</td>
</tr>
<tr>
<td>TRIENNIAL</td>
<td>Every three years</td>
</tr>
<tr>
<td>WEEKLY</td>
<td>Weekly</td>
</tr>
</tbody>
</table>

The *Display Complete List* button can be used to show all the delivered pattern templates.
Here is an example of the frequency fixed field (Frequn) in a MARC record:

Pattern Policies

Pattern templates are delivered with the software. They are controlled by pattern policies in the Symphony 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:
Here is an example of a frequency code policy associated with the pattern template policy:

<table>
<thead>
<tr>
<th>Frequency</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
<td>WEEKLY</td>
</tr>
<tr>
<td>Description:</td>
<td>Weekly</td>
</tr>
<tr>
<td>Code:</td>
<td>w</td>
</tr>
</tbody>
</table>

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.

The Get Expected Issue Info window displays when you initially create the serial control record if you have the Allow Automatic Prediction of Issues check box selected.

This window also 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.
This helper is available in the Create Control and Modify Control wizards.

If the Generate Predictions helper is not available, search for the title in the Modify Control wizard, click the Patterns tab, select the Allow Automatic Prediction of Issues check box, and click Modify Control. When you return to the record in the Modify Control wizard, the helper will be available.

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.
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 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 October 20, 2011 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 October 2011, 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 field. 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 field for the first issue. WorkFlows uses this start date to calculate the date expected for each predicted issue.

**Importance of carefully selecting 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 Predicted field is not filled in correctly (i.e., the date first prediction does not match the chronology and date published), the expected dates may not be calculated correctly.
Creating Predictions for a Monthly Publication

To generate predictions for a monthly publication:

1. Within the Common Tasks group of wizards, click the Create Control wizard.

2. Type in your search terms in the Search for field and click Search.

3. If more than one record matches your search, select the one you want and click Create Control.

4. Make any necessary changes to the Library or Holding Code and click OK.

5. Enter the necessary information in the Basic tab.

6. Click the Patterns tab.

7. Verify the enumeration values in the Enumeration Pattern area.

8. Verify the value in the Chronology Pattern area. It should be set to MONTH.

9. Make any other necessary changes to the tabs available.

10. Click Create Control.
11. In the Get Expected Info window, type the volume and number of the next expected issue in the V. and NO. fields.

12. Enter the Chronology – for example, OCT 2011.

13. Type or use the Date First Prediction gadget to enter a date.

14. Type or use the Date Expected gadget to enter a date.

15. Click Generate Predictions.

16. Click Save Prediction.

17. Click OK.

18. Click OK.
Creating Predictions for a Weekly Publication

To generate predictions for a weekly publication:

1. Within the Common Tasks group of wizards, click the Create Control wizard.

2. Type in your search terms in the Search for field and click Search.

3. If more than one record matches your search, select the one you want and click Create Control.

4. Make any necessary changes to the Library or Holding Code and click OK.

5. Enter the necessary information in the Basic tab.

6. Click the Patterns tab.

7. Verify the enumeration values in the Enumeration Pattern area.

8. Verify the value in the Chronology Pattern area. It should be set to DATE.

9. Make any other necessary changes to the tabs available.

10. Click Create Control.
11. In the Get Expected Info window, type the volume and number of the next expected issue in the V. and NO. fields.

12. Enter the Chronology – for example, OCT, 3 2011.

13. Type or use the Date First Prediction gadget to enter a date.

14. Type or use the Date Expected gadget to enter a date.

15. Click Generate Predictions.

16. Click Save Prediction.

17. Click OK.

18. Click OK.
Creating Predictions for a Bimonthly Publication

To generate predictions for a bimonthly publication:

1. Within the Common Tasks group of wizards, click the Create Control wizard.

2. Type in your search terms in the Search for field and click Search.

3. If more than one record matches your search, select the one you want and click Create Control.

4. Make any necessary changes to the Library or Holding Code and click OK.

5. Enter the necessary information in the Basic tab.

6. Click the Patterns tab.

7. Verify the enumeration values in the Enumeration Pattern area.

8. Verify the value in the Chronology Pattern area. It should be set to BIMONTH or BIMONTH2 depending on the publication pattern.

9. Make any other necessary changes to the tabs available.

10. Click Create Control.
11. In the Get Expected Info window, type the volume and number of the next expected issue in the V. and NO. fields.

12. Enter the Chronology – for example, OCT/NOV 2011.

13. Type or use the Date First Prediction gadget to enter a date.

14. Type or use the Date Expected gadget to enter a date.

15. Click Generate Predictions.
16. Click **Save Prediction**.

17. Click **OK**.

18. Click **OK**.

**Creating Predictions for a Quarterly Publication**

To generate predictions for a quarterly publication:

1. Within the Common Tasks group of wizards, click the *Create Control* wizard.

2. Type in your search terms in the Search for field and click **Search**.

3. If more than one record matches your search, select the one you want and click **Create Control**.

4. Make any necessary changes to the Library or Holding Code and click **OK**.

5. Enter the necessary information in the **Basic** tab.

6. Click the **Patterns** tab.

7. Verify the enumeration values in the Enumeration Pattern area.

8. Verify the value in the Chronology Pattern area. It should be set to SEASON, SEASON2 or SEASON3 depending on the publication pattern.
9. Make any other necessary changes to the tabs available.

10. Click Create Control.

11. In the Get Expected Info window, type the volume and number of the next expected issue in the V. and NO. fields.

12. Enter the Chronology. For example, OCT/DEC 2011 or FALL 2011.

13. Type or use the Date First Prediction gadget to enter a date.

14. Type or use the Date Expected gadget to enter a date.
15. Click **Generate Predictions**.

16. Click **Save Prediction**.

17. Click **OK**.

18. Click **OK**.
Creating Predictions for an Annual Publication

You can create batch predictions for an annual publication; however, because you may not always receive the title exactly the same time every year, it may be best to create the prediction upon check-in.

To create an annual publication serial control record:

1. Within the Common Tasks group of wizards, click the Create Control wizard.
2. Type in your search terms in the Search for field and click Search.
3. If more than one record matches your search, select the one you want and click Create Control.
4. Make any necessary changes to the Library or Holding Code. For example, if most of the serial records use a “serial” holding code, but this item will be sent to the reference collection, make the appropriate change to holding code.
5. Enter the necessary information in the Basic tab.
6. Click the Patterns tab.
7. Verify the enumeration values in the Enumeration Pattern area.
8. Verify the value in the Chronology Pattern area. It should be set to YEAR.

9. Because you will be creating predictions upon check-in, uncheck the Allow Automatic Prediction of Issues box.
10. Click the Distribution tab.
11. If you will be barcoding this item upon receipt and the Copies to Add to Catalog field is 0, click the Modify a Distribution tool.
12. Change the Copies to Add to Catalog value to 1.

13. Verify the appropriate Holding Code.

<table>
<thead>
<tr>
<th>Receiving</th>
<th>ALL copies</th>
<th>copies distributed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holding code:</td>
<td>AREFBK</td>
<td></td>
</tr>
<tr>
<td>Copies expected:</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Copies to add to catalog:</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

14. Click **Modify Distribution**.

15. Click **Create Control**.

16. Click **OK**.

For those annual subscriptions that cannot be predicted, staff can create the serial control record with the appropriate information, but receive the issues upon check in.

To create a prediction upon check in:

1. Within the Common Tasks group of wizards, click the **Check In** wizard.

2. Type in your search terms in the Search for field and click **Search**.

3. Enter the volume.

4. Type in a Chronology in the Chronology field.

5. If necessary, enter any receipt comments.
6. Click **Check In**.

7. If you will be barcoding this item, scan the Item ID or type it into the field and click **OK**. You may also have the system auto-generate an Item ID by selecting AUTO with the drop down.

8. If you typed in an Item ID or selected AUTO, click **OK**.

9. Click **OK**.
Creating Predictions without Labels

Some publications may only use chronology instead of enumeration. Because enumeration is not required by the system, libraries interested in simplifying the maintenance of prediction records can remove enumeration and use chronology only. For example, if a journal or magazine skips enumeration and the serial control record uses enumeration values (labels), the predictions would have to be modified to reflect the publication. This requires staff to remove existing predictions and re-predict based on the new enumeration. For library staff who removed the enumeration in the control record and use chronology only, this adjustment would likely be unnecessary.

To create predictions without labels:

1. Within the Common Tasks group of wizards, click the Create Control wizard.  
2. Type in your search terms in the Search for field and click Search.  
3. If more than one record matches your search, select the one you want and click Create Control.  
4. Make any necessary changes to the Library or Holding Code and click OK.  
5. Enter the necessary information in the Basic tab.  
6. Click the Patterns tab.  
7. Clear the check boxes in the Enumeration Pattern area under Use.  
8. Verify the value in the Chronology Pattern area.  
9. Make any other necessary changes to the tabs available.  
10. Click Create Control.
11. In the Get Expected Info window, enter the Chronology.

12. Type or use the Date First Prediction gadget to enter a date.

13. Type or use the Date Expected gadget to enter a date.

14. Click Generate Predictions.

15. Click Save Prediction.

16. Click OK.

17. Click OK.
Creating Predictions with Omissions

Some serials will have a publication break during an otherwise predictable cycle. The *Omit Issues By* helper in the serial control record allows publication breaks to be specified without affecting a title’s overall prediction cycle. This is done in the *Patterns* tab of the serial control record and the options that display in the helper depend on the publication cycle you selected.

For example, if you have a monthly serial which combines the months June, July, and August, you will use the *Omit Issues By* helper to omit July and August. You know that you will have to omit issues because the enumeration does not go to No. 12. Instead it stops at No. 10. This is a clear indication that omissions will be necessary in order for the predictions to follow the serial.

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.

**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 is compatible with the publication cycle you select.

**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.
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.

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.

To create predictions with omissions:

1. Within the Common Tasks group of wizards, click the Create Control wizard.

2. Type in your search terms in the Search for field and click Search.

3. If more than one record matches your search, select the one you want and click Create Control.

4. Make any necessary changes to the Library or Holding Code and click OK.

5. Enter the necessary information in the Basic tab.

6. Click the Patterns tab.

7. Verify the enumeration values in the Enumeration Pattern area.

8. If necessary, change the Limit value.
9. Verify the value in the Chronology Pattern area.

10. Click the Publication Cycle gadget.

11. Click the Omit Issues By helper.

12. Based on your publication and its publication cycle, make the appropriate selections within the tabs available.

13. Click OK.
14. Click OK.

15. Click the Subscription tab and modify the Number of Issues to reflect the number of issues in the subscription.

16. Make any other necessary changes to the tabs available.

17. Click Create Control.
18. In the Get Expected Info window, type the volume and number of the next expected issue in the V. and NO. fields.

19. Enter the Chronology.

20. Type or use the Date First Prediction gadget to enter a date.

21. Type or use the Date Expected gadget to enter a date.

22. Click Generate Predictions.
23. Click **Save Prediction**.

24. Click **OK**.

25. Click **OK**.
Creating Predictions with 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 2011. When creating the predictions, you might expect the volume to increase on the January issue. When creating the predictions, however, it will not. The volume increases on the May 2012 issue.

<table>
<thead>
<tr>
<th>Prediction Records</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preview 12</td>
</tr>
<tr>
<td>expected issues starting with:</td>
</tr>
<tr>
<td>V. 22</td>
</tr>
<tr>
<td>NO. 30</td>
</tr>
<tr>
<td>Chronology: OCT 2011</td>
</tr>
<tr>
<td>Date first predicted: 10/1/2011</td>
</tr>
<tr>
<td>Date expected: 10/1/2011</td>
</tr>
</tbody>
</table>

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 2012 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—which can evenly divide into the No. 36. Therefore, the volume increased on the May 2012 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.

To create predictions with continuous numbering:

1. Within the Common Tasks group of wizards, click the Create Control wizard.

2. Type in your search terms in the Search for field and click Search.

3. If more than one record matches your search, select the one you want and click Create Control.

4. Make any necessary changes to the Library or Holding Code and click OK.

5. Enter the necessary information in the Basic tab.

6. Click the Patterns tab.

7. Verify the enumeration values in the Enumeration Pattern area.

8. Select the Continuous check box for the second label.

9. If necessary, modify the number of issues in the Limit field.

10. Make any other necessary changes to the tabs available.

11. Click Create Control.

12. In the Get Expected Info window, type the volume and number of the next expected issue in the V. and NO. fields.

13. Enter the Chronology.

14. Type or use the Date First Prediction gadget to enter a date.

15. Type or use the Date Expected gadget to enter a date.
16. Click **Generate Predictions**.

![Prediction Records](image)

**Prediction Records**

- **Preview 12 expected issues starting with:**
  - V. 22
  - NO. 30
- **Chronology:** OCT 2011
- **Date first prediction:** 10/1/2011
- **Date expected:** 10/1/2011

<table>
<thead>
<tr>
<th>Enumeration »</th>
<th>Chronology</th>
<th>Date expected</th>
</tr>
</thead>
<tbody>
<tr>
<td>V. 22 NO. 30</td>
<td>OCT 2011</td>
<td>10/1/2011</td>
</tr>
<tr>
<td>V. 22 NO. 31</td>
<td>NOV 2011</td>
<td>11/1/2011</td>
</tr>
<tr>
<td>V. 22 NO. 32</td>
<td>DEC 2011</td>
<td>12/1/2011</td>
</tr>
<tr>
<td>V. 22 NO. 33</td>
<td>JAN 2012</td>
<td>1/1/2012</td>
</tr>
<tr>
<td>V. 22 NO. 34</td>
<td>FEB 2012</td>
<td>2/1/2012</td>
</tr>
<tr>
<td>V. 22 NO. 35</td>
<td>MAR 2012</td>
<td>3/1/2012</td>
</tr>
<tr>
<td><strong>V. 22 NO. 36</strong></td>
<td><strong>APR 2012</strong></td>
<td><strong>4/1/2012</strong></td>
</tr>
<tr>
<td>V. 22 NO. 37</td>
<td>MAY 2012</td>
<td>5/1/2012</td>
</tr>
<tr>
<td>V. 23 NO. 38</td>
<td>JUN 2012</td>
<td>6/1/2012</td>
</tr>
<tr>
<td>V. 23 NO. 39</td>
<td>JUL 2012</td>
<td>7/1/2012</td>
</tr>
<tr>
<td>V. 23 NO. 40</td>
<td>AUG 2012</td>
<td>8/1/2012</td>
</tr>
<tr>
<td>V. 23 NO. 41</td>
<td>SEP 2012</td>
<td>9/1/2012</td>
</tr>
</tbody>
</table>

17. Click **Save Prediction**.

18. Click **OK**.

19. Click **OK**.
Creating Predictions One at a Time

Once predictions are generated, they appear in the Expected tab of the serial control record. If necessary, a single prediction can be created using the Create Single Prediction tool.

To create a single prediction:

1. Within the Common Tasks group of wizards, click the Modify Control wizard.

2. Type in your search terms in the Search for field and click Search.

3. If more than one record matches your search, select the one you want and click Modify Control.

4. Click the Expected tab.

5. Click the Create Single Prediction tool.

6. Enter the Enumeration. This may generally be defined as the volume, issue, and any item numbers displayed on the issue.

7. Enter the Chronology which is the date published on the issue.
8. Type or use the *Date First Prediction* gadget to enter a date.

9. Type or use the *Date Expected* gadget to enter a date.

10. Type or use the *Date to Claim* gadget to enter a date begins claiming unreceived copies of the issue. You can calculate this number by adding the number in the Days to Wait Before Claiming field in the **Patterns** tab of the serial control record to the Date Expected you entered on this tab.

11. If necessary, enter information in the Comment field.

12. Click **Create Prediction**.
Loading Pub Patterns from 891 Entries

In the Create Control or Modify Control wizard workflow, 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 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.
e-Library Display Options

Depending on the settings of the serial control record, e-Library can show recently arrived issues, volume holdings, and/or MARC holding information. These are automatic settings that the serials control module uses, and because they are established in the control record, you can decide on a title-by-title basis which ones you enable.

In this section you will learn to:

- Set the control record to update recently arrived issues.
- Set the control record to create volume holdings.
- Set the control record to update MARC holdings.
- Add textual holdings.
- Create a dummy copy.

### e-Library Display Options

Below is an example of a serial record with all available OPAC display options enabled in the serial control record.

<table>
<thead>
<tr>
<th>Item Details</th>
<th>Item Information</th>
<th>Catalog Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keep</td>
<td>Title</td>
<td>Early childhood education journal</td>
</tr>
<tr>
<td>Find more on these topics</td>
<td>Publisher: Human Sciences Press, 2900 N. 13th, Omaha, Nebraska 68182</td>
<td></td>
</tr>
<tr>
<td>Nearby titles on shelf</td>
<td>Pub date: 1995-</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Pages:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Item info: 4 copies available at E. A. Arrowood Foundation Library</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Location: PERIODICALS -</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Holdings: 001:0 (2011:Jan,Mar) - 001:0 (2011:Oct,Nov)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Textual holdings: Library has Vol 2, no. 3 (Fall 1995)</td>
<td></td>
</tr>
</tbody>
</table>

**Textual holdings**

- E. A. Arrowood Foundation Library
  - U3115.25 E260
  - U3115.25 E260 V. 39 No. 1
  - U3115.25 E260 V. 39 No. 2
  - U3115.25 E260 V. 39 No. 3
  - U3115.25 E260 V. 39 No. 4

**Volume holdings**

- Material: Non-Circulating Magazine
- Location: Periodicals
- Copies: 1

**Automatic update of MARC holdings**

- Material: Non-Circulating Magazine
- Location: Periodicals
- Copies: 1
Recently Arrived Issues

A serial control record may be created or modified so that the specific issue identification (chronology, enumeration, or both) is added to a special note field of the bibliographic record. This note field, which appears in the catalog as Recently Arrived, is usually the 599 entry.

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 arrived.

Recently arrived issues appear by setting the Number of Most Recently Arrived Issues to Display as a Note on the OPAC Display tab of the serial control record. 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.

You may determine how the issue appears by setting Form of Name to Display Enumeration, Chronology, or Both.
Each time an issue is checked-in its name is added to the beginning of the Recently Arrived entry. The control record monitors the number of issue names in the 599 entry and drops off the oldest name when the specified number of issues appears in the entry. In a multi-library setting when distributions are used, a Recently Arrived note is added for each defined distribution.

Below is an example of Recently Arrived notes for multiple libraries:

### Scientific American

<table>
<thead>
<tr>
<th>ISSN:</th>
<th>0036-8733 0036-8733</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key title:</td>
<td>Scientific American</td>
</tr>
<tr>
<td>Title:</td>
<td>Scientific American</td>
</tr>
<tr>
<td>Current frequency:</td>
<td>Monthly, Nov. 1921-</td>
</tr>
<tr>
<td>Volume/date range:</td>
<td>Began with vol. 1, no. 1 (Aug. 26, 1859)</td>
</tr>
<tr>
<td>Volume/date range:</td>
<td>v. 14, no. 42 (June 25, 1859) ; new ser., v. 1, no. 1 (July 2, 1859)</td>
</tr>
</tbody>
</table>

- Recently arrived: ARROWOOD—OCT 2011;SEP 2011;
- Recently arrived: CAFFEY—OCT 2011;SEP 2011;
- Recently arrived: FEW—OCT 2011;SEP 2011;
- Recently arrived: MOYER—SEP 2011;

- Subject term: Technology—Periodicals.
- Subject term: Science—Periodicals.
- Subject term: Exacte wetenschappen.
- Subject term: Technologie—Périodiques.
- Subject term: Sciences—Périodiques.
- Absorbed: People's journal Nov. 1854
- Absorbed: Scientific American monthly Nov. 1921 0740-6455

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.
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.

<table>
<thead>
<tr>
<th>ID: SC-67</th>
<th>Ctrl lib: ARROWOOD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distribution</td>
<td>Binding</td>
</tr>
<tr>
<td>Basic</td>
<td>Patterns</td>
</tr>
<tr>
<td>□ Automatically update MARC holdings</td>
<td></td>
</tr>
<tr>
<td>Number of most recently arrived issues to display as a note: 3</td>
<td></td>
</tr>
<tr>
<td>Form of name to display: ○ Enumeration ○ Chronology ○ Both</td>
<td></td>
</tr>
</tbody>
</table>

**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 e-Library)
- Both = Volume, No., Month, Year

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. Within the Common Tasks group of wizards, click the Create Control wizard.
2. Type in your search terms in the Search for field and click **Search**.
3. If more than one record matches your search, select the one you want and click **Create Control**.
4. Make any necessary changes to the Library or Holding Code and click **OK**.
5. Enter the information needed for your control record on the **Basic**, **Subscription**, **Patterns**, and **Extended Info** tabs.

6. Click the **OPAC Display** tab.

7. Type the **Number of Most Recently Arrived Issues to Display as a Note**.

8. Select Enumeration, Chronology, or Both for the **Form of Name to Display**.

9. Click **Create Control**.

10. In the Get Expected Info window, type the volume and number of the next expected issue in the **V.** and **NO.** fields.

11. Enter the **Chronology**.

12. Type or use the **Date First Prediction** gadget to enter a date.

13. Type or use the **Date Expected** gadget to enter a date.

14. Click **Generate Predictions**.

15. Click **Save Prediction**.

16. Click **OK**.

*These settings can be added after the serial control record has already been created. Use the **Modify Control** wizard to make these changes.*
Serials Control

Item Information: Catalog Record
Guardian weekly (Manchester, England : 2000)
ISSN: ISSN (incorrect)3068
Title: The guardian weekly
Publication info: Manchester, UK : Guardian Publications, c1999 [i.e. 2000]-
Current frequency: Weekly
Volume/date range: Vol. 161, no. 9 (Feb. 24 to Mar. 1, 2010)-
Hold by: ARROWOOD
Recently arrived: ARROWOOD—SEP 12, 2011|SEP 6, 2011|AUG 29, 2011
Geographic term: Manchester (England)—Newspapers.
Continues: Manchester guardian weekly (Manchester, England : 1995) 3068
Other title: Weekly mail is guardian

Item Information: Catalog Record
The International journal of social psychiatry
ISSN: 0020-7640 0020-7648
Key title: International journal of social psychiatry
Title: The International journal of social psychiatry
Variant title: IJSIP International journal of social psychiatry
Current frequency: Biannually, 2006-
Volume/date range: v. 1- summer 1955-
Hold by: ARROWOOD
Recently arrived: ARROWOOD—V. 47 NO. 4; V. 47 NO. 3; V. 47 NO. 2;
Subject term: Social psychiatry—Periodicals.
Subject term: Société psychiatrie.
Subject term: Psychiatrie sociale—Périodiques.

Item Information: Catalog Record
Journal of American history (Bloomington, Ind.)
Organization of American Historians.
ISSN: 0021-8723 0021-8723
Uniform title: Journal of American history (Bloomington, Ind.)
Key title: The Journal of American history (Bloomington, Ind.)
Title: The Journal of America history.
Publication info: Bloomington, Ind. : Mississippi Valley Historical Association, c1900-
Current frequency: Quarterly
Volume/date range: Vol. 51, no. 1 (June 1964)-
Hold by: ARROWOOD
Recently arrived: ARROWOOD—V. 98 NO. 2 SEP 2011|V. 98 NO. 1 JUL 2011|SEP 2011
Geographic term: United States—History—Periodicals.
Geographic term: États-Unis—Histoire—Périodiques.
Continues: Mississippi Valley historical review 0101-091x
Electronic access: http://www.arrow.com
Volume Holdings

A serial control record may be created or modified so that when items are checked in they will be added to the catalog as volumes and call numbers with individual item IDs. Typically, libraries use this option only when they want to retain materials permanently and/or circulate them.

In a single library, the control may be set to add some or all of the issues received to the catalog using Copies to Add to Catalog in the Distribution tab of the serial control record.

In a multiple library setting when distributions are used, each defined library or location distribution record may be set to add some or all of the issues received for that distribution in Copies to Add to Catalog on the Distribution tab.

The call number for each issue for which an item is created in the catalog is determined by combining the base call number in the control record with the issue’s numeration or chronology.
Basic Tab

Type the appropriate information in the Base Call Number field. SirsiDynix Symphony 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 or DEWEYPER is the preferred class scheme because of the reverse chronological sort rule.

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.
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.

To create volume holdings:

1. Within the Common Tasks group of wizards, click the Create Control wizard.
2. Type in your search terms in the Search for field and click Search.
3. If more than one record matches your search, select the one you want and click Create Control.
4. Make any necessary changes to the Library or Holding Code and click OK.
5. On the **Basic** tab, type the appropriate information in the Base Call Number field.

6. Select the Class Scheme using the drop down.

7. Enter the information needed for your control record on the **Subscription**, **Patterns**, and **Extended Info** tabs.

8. Click the **OPAC Display** tab.

9. Select **Enumeration**, **Chronology**, or **Both** for the Form of Name to Display.

10. Click the **Distribution** tab.

11. Click the **Modify a Distribution** tool.

12. Type the number of copies in the **Copies to Add to Catalog** box to create at check-in.

13. Select the appropriate **Holding Code** that represents the library, location, and item type of the material.

14. Click **Modify Distribution** to return to the **Distribution** tab.

15. Click **Create Control**.

16. In the Get Expected Info window, type the volume and number of the next expected issue in the V. and NO. fields.

17. Enter the Chronology.

18. Type or use the **Date First Prediction** gadget to enter a date.

19. Type or use the **Date Expected** gadget to enter a date.

20. Click **Generate Predictions**.
21. Click Save Prediction.

22. Click OK.

These settings can be added after the serial control record has already been created. Use the Modify Control wizard to make these changes.

You may find that the bibliographic record contains an empty call number, a call number with no item attached. You can remove this using the Delete Title, Call Numbers, or Items or the Call Number and Item Maintenance wizards.

To remove a call number with no item attached:

1. Navigate to the Cataloging toolbar.

2. Within the Common Tasks group of wizards, click the Call Number and Item Maintenance wizard.

3. Type in your search terms in the Search for field and click Search.

4. If more than one record matches your search, select the one you want and click Modify.

5. Click the Call Number/Item tab.

6. Within the tree, highlight the call number you want to remove.

7. Click Delete.
8. Click Yes to remove the call number.

9. Click Close.

**MARC Holdings**

A serial control record may be created or modified so that when items are checked in, MARC holdings records will be created for display in the catalog.

In a single library, if the Automatically Update MARC Holdings check box in the OPAC Display tab is selected when a control is created, a MARC Holdings record is automatically linked to the serial control record, and the holdings are automatically updated as issues are received. If the control is created and this check box is not selected, a MARC Holdings record must be linked to the serial control record. This may be done using the Link to Serial Holdings Record helper.

In a multiple library setting when distributions are used, MARC holdings are updated the same way as in a single library. However, in order to add holdings for a particular call number as issues are received, the Update MARC Holdings Records check box in each distribution to be updated must also be selected.

A MARC holdings record would typically be used for materials, such as bound volumes, binder sets, microfilm, and other permanently retained materials. 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.

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).
OPAC Display Tab

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

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.
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.

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

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 e-Library.

Update MARC Holding 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 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.
Understanding the Role of Linking

SirsiDynix Symphony 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 present a concise holdings summary in the OPAC. In order to facilitate the automatic update of MARC holdings through check-in, SirsiDynix Symphony 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 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 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 creates a new 853 in this context, it will contain a new linking number in subfield 8.
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 uses the linking relationship between 853 and 863 fields as well as sequence numbers to present a concise holdings summary in e-Library.
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 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.

Typical Maintenance of MARC Holding 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. Within the Common Tasks group of wizards, click the Modify Control wizard.
2. Type in your search terms in the Search for field and click Search.
3. If more than one record matches your search, select the one you want and click Modify Control.
4. Click the MARC Holdings tab.
5. Click the button under the Location – Linked to column for the appropriate library.
6. Either right click on the field and click Delete Field or click the Delete the Current Field helper.
You can also use the *Delete the Current Field* helper.

7. Click **Save**.

8. Click **Close**.

**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. Within the Common Tasks group of wizards, click the **Modify Control** wizard.

2. Type in your search terms in the Search for field and click **Search**.

3. If more than one record matches your search, select the one you want and click **Modify Control**.

4. Click the **MARC Holdings** tab.

5. Click the button under the Location – Linked to column for the appropriate library.

6. Right-click on an existing tag in the area where you would like to place the new 856 field.

7. Click **Add Field Before** to insert a row before the placeholder or **Add Field After** to insert a row after the placeholder.

8. In the new Undefined row, type 856 in the Tag column.
9. Type the address to provide the hypertext link.

10. Click **Save**.

11. Click **Close**.
Adding Textual Holdings

Because staff is unable to generate predictions for issues earlier than 1970, it may be necessary to use a summary statement (866 tag) that reflects the libraries holdings.

This tag may also be used to represent the range of issues that the library holds.

To create textual holdings:

1. Within the Common Tasks group of wizards, click the Modify Control wizard.

2. Type in your search terms in the Search for field and click Search.

3. If more than one record matches your search, select the one you want and click Modify Control.

4. Click the MARC Holdings tab.

5. Click the button under the Location – Linked to column for the appropriate library.

6. Right-click on an existing tag in the area where you would like to place the new 866 field.

7. Click Add Field Before to insert a row before the placeholder or Add Field After to insert a row after the placeholder.
8. In the new Undefined row, type 866 in the Tag column.

9. Type the information into the Contents area of the field.

10. Click Save.

11. Click Close.
Creating a Dummy Copy

To manage a serial or parts of a serial through the Serial Control module, there must be a title record for the serial in the SirsiDynix Symphony catalog.

An important consideration in the process of creating a serial title in the catalog is the first call number associated with the title. This call number and its associated copy’s item type and location may provide some important information about a serial’s holdings. Of course, it is not necessary to create a copy when the call number and title are created.

The very first call number associated with a serial title record may be created with COPY: 1 and it may indicate a range of holdings the library has or expects to receive for that title, or displays a message to the user to view the record for holdings.

The advantage of this dummy copy method is that a search results list can show the serial’s title, the base call number plus a range of holdings or a message, and an item type and a location.

Below is an example of a serial record with no dummy copy. It indicates that the available copies at the library are NONE.

<table>
<thead>
<tr>
<th>Item Information</th>
<th>Catalog Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Journal of singing: the official journal of the National Association of Teachers of Singing</td>
</tr>
<tr>
<td>Author</td>
<td>National Association of Teachers of Singing (U.S.)</td>
</tr>
<tr>
<td>Pub date</td>
<td>c1995-</td>
</tr>
<tr>
<td>Pages</td>
<td>v.</td>
</tr>
<tr>
<td>Item info</td>
<td>No copies available in any library.</td>
</tr>
</tbody>
</table>

ARROWOOD

Location: PERIODICAL--

E. A. Arrowood Foundation Library
ML27 .J5 N2652

Below is an example of a serial record with a dummy copy along with a public note.

<table>
<thead>
<tr>
<th>Item Information</th>
<th>Catalog Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Journal of Dharma</td>
</tr>
<tr>
<td>Author</td>
<td>Dharmaram College, Centre for the Study of World Religions.</td>
</tr>
<tr>
<td>Publisher</td>
<td>Dharmaram Research Association, Centre for the Study of World Religions, Dharmaram College [also.]</td>
</tr>
<tr>
<td>Pages</td>
<td>v.</td>
</tr>
<tr>
<td>Item info</td>
<td>1 copy available at E. A. Arrowood Foundation Library.</td>
</tr>
</tbody>
</table>

ARROWOOD

Location: PERIODICAL--
Holdings: v.36:no.1 (2011:Jan./Mar.)

E. A. Arrowood Foundation Library
ML3 .J56

Note: Additional volumes
To create an item record for a serial title:

1. Navigate to the Cataloging toolbar.

2. Within the Common Tasks group of wizards, click the Call Number and Item Maintenance wizard.

3. Type in your search terms in the Search for field and click Search.

4. If more than one record matches your search, select the one you want and click Modify.

5. Click the Call Number/Item tab.

6. Click Add Item.

7. Make any necessary changes to the item information, such as Home Location, Item Type, Item categories, and/or price.
8. Change the Call Number, if necessary.

9. Type the word AUTO into the Item ID field to have the system auto-generate an Item ID.
10. Enter a Public note, if necessary, to indicate any additional information about the publication.

11. Click Save.

12. Click Close.
Checking In and Working with Serial Issues

The Check In wizard guides you through the process of checking in your serial issues.

In this section you will learn to:

- Check in predicted issues.
- Check in issues received out of order.
- Check in special issues, such as indexes or supplements (issues without predictions).
- Combine two or more issues.
- Modify issues as they are checked in.
- Check in a different number of copies than expected.
- Check in issues by barcode.
- Unreceive an issue.

**Check in Predicted Issues**

To check in serial issues:

1. Within the Common Tasks group of wizards, click the Check In wizard.

2. Type in your search terms in the Search field and click Search.

   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.

3. If more than one record matches your search, select the one you want and click Check In Issues.

4. Verify that the copy in hand is the Expected Issue.
5. Click **Check In Now** or press Enter. You may also hold down the Alt key and press the letter O.

- If the issue has routings, the routing lists will display. For more information on creating routing lists, see the section of this guide that discusses routing on page 142.

- 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.
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.

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

### Check-in an Issue Out of Order

To check in an issue out of order:

1. Within the Common Tasks group of wizards, click the **Check In** wizard.

2. Type in your search terms in the Search for field and click **Search**.

3. If more than one record matches your search, select the one you want and click **Check In Issues**.

4. Click **Different Issue**.
5. Highlight the issue received and click **Selected Issue**.

6. Verify the number of copies received.

7. Type a Receipt comment if needed.

   **Receiving A Predicted Issue**

   Enumeration: V. 39 NO. 8
   Chronology: AUG 2011
   Number expected: 1
   Number received: [ ]
   Receipt comment: 

   [Check In (o)  Cancel]

8. Click **Check In** or press Enter. You may also hold down the Alt key and press the letter O.

9. From here you can:

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

To check in without a prediction according to pattern:

1. Within the Common Tasks group of wizards, click the Check In wizard.
2. Type in your search terms in the Search for field and click Search.
3. If more than one record matches your search, select the one you want and click Check In Issues.
4. Click Different Issue.
5. Click Special Issue.
6. Verify that According to Pattern is selected.
7. Type the volume and number in the V. and NO. fields.
8. Type the Chronology.
9. Verify the number of copies expected and received.
10. Type a Receipt comment if needed.

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

To check in a basic special issue:

1. Within the Common Tasks group of wizards, click the Check In wizard.
2. Type in your search terms in the Search for field and click Search.
3. If more than one record matches your search, select the one you want and click Check In Issues.
4. Click Different Issue.
5. Click Special Issue.
6. Select the Special option.
7. Verify that Basic is selected.
8. Type the Enumeration.
9. Type the Chronology.
10. Verify the number of copies expected and received.

11. Type a Receipt comment if needed.

12. Click **Check In**.

13. From here you can:
   - Click **Next Issue** to check-in another issue of the same title.
   - Click **New Search** to perform the check in process for another serial title.
   - Click **Close** to exit the wizard.
Supplement

A Supplement special issue is any supplement that is not cataloged on a different bibliographic record and not received on a separate serial control attached to the same bibliographic record. A typical use for the Supplement option might be an occasional Supplement published only for time critical issues by a monthly news journal, or a Special Supplement published irregularly. These issues appear on one issue per entry as Suppl Text Holdings. These issues are recorded as 867 tags in the MARC Holdings record.

Supplements also display separately from the MARC holdings that are automatically updated upon check-in.

**Item Information**

**Catalog Record**

**Title**  
Archaeology (New York, N.Y.)

**Author**  
Jay I. Kislak Reference Collection (Library of Congress)

**Publisher:**  
Archaeological Institute of America,

**Pub date:**  
1948-

**Pages:**  
v.

**Item info:**  
No copies available in any library.

**Location:** PERIODICAL--

**Holdings:** v.65:no.3 (2011:May/June)

**Suppl text holdings:** v. 65 NO. 5 SUP (2012 ANNUAL MEETING)

**To check in a supplement:**

1. Within the Common Tasks group of wizards, click the Check In wizard.

2. Type in your search terms in the Search for field and click Search.

3. If more than one record matches your search, select the one you want and click Check In Issues.
4. Click **Different Issue**.

5. Click **Special Issue**.

6. Select the Special option.

7. Select the Supplement option.

8. Type the Enumeration.

9. Type the Chronology.

10. Verify the number of copies expected and received.

11. Type a Receipt comment if needed.

12. Click **Check In**.
13. From here you can:

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

**Index**

An Index special issue is an index that is not cataloged on a different bibliographic record and not received on a separate serial control attached to the same bibliographic record. These issues appear on one issue per entry as Index Text Holdings. These issues are recorded as 868 tags in the MARC Holdings record.

<table>
<thead>
<tr>
<th>Rec_Type</th>
<th>Enc_Lvl</th>
<th>Entrd</th>
<th>Acq_Stat</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acq_Meth</td>
<td>Can_Date</td>
<td>Gen_Rtn</td>
<td>Sp_Rtn</td>
</tr>
<tr>
<td>Complete</td>
<td>Copies</td>
<td>Lending</td>
<td>Repr</td>
</tr>
<tr>
<td>Lang</td>
<td>Composit</td>
<td>Updated</td>
<td>110913</td>
</tr>
</tbody>
</table>

Indexes also display separately from the MARC holdings that are automatically updated upon check-in.
To check in an index:

1. Within the Common Tasks group of wizards, click the *Check In* wizard.

2. Type in your search terms in the Search for field and click *Search*.

3. If more than one record matches your search, select the one you want and click *Check In Issues*.

4. Click *Different Issue*.

5. Click *Special Issue*.

6. Select the Special option.

7. Select the Index option.

8. Type the Enumeration.

9. Type the Chronology.
10. Verify the number of copies expected and received.

11. Type a Receipt comment if needed.

12. Click **Check In**.

13. From here you can:
   - Click **Next Issue** to check-in another issue of the same title.
   - Click **New Search** to perform the check-in process for another serial title.
   - Click **Close** to exit the wizard.

**Check-in a Combined Issue**

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

To set the display pattern of the combined issues in the enumeration and chronology fields, right-click **Check In** wizard and make the necessary changes.

You can make changes during check-in using the **Combine Issues Options** helper.
To check in a combined issue:

1. Within the Common Tasks group of wizards, click the Check In wizard.
2. Type in your search terms in the Search for field and click Search.
3. If more than one record matches your search, select the one you want and click Check In Issues.
4. Click Different Issue.
5. Click Combine Issues.
6. Select the check boxes of the issues you want to combine.
7. If necessary, click the Combine Issues Options helper to establish the display pattern of the enumeration and chronology fields and click OK.

8. Click Combine Issues.
9. Make any necessary changes to the enumeration and/or chronology.

10. Verify the number of copies expected and received.

11. Type a Receipt comment if needed.

12. Click **Check In**.

13. From here you can:
   - Click **Next Issue** to check-in another issue of the same title.
   - Click **New Search** to perform the check-in process for another serial title.
   - Click **Close** to exit the wizard.

**Check in and Modify an Issue**

Issue information can be modified during check in.

To modify an issue upon check-in:

1. Within the Common Tasks group of wizards, click the **Check In** wizard.

2. Type in your search terms in the Search for field and click **Search**.

3. If more than one record matches your search, select the one you want and click **Check In Issues**.

4. Click **Different Issue**.
5. Click **Modify Issue**.

6. Make the appropriate changes to the information. If you enter information into the Comment field, it will appear as Special Instructions.

7. Click **Modify Issue**.
8. Verify the number of copies received.

9. Type a Receipt comment if needed

10. Click **Check In**.

11. From here you can:

   - Click **Next Issue** to check-in another issue of the same title.
   - Click **New Search** to perform the check-in process for another serial title.
   - Click **Close** to exit the wizard.
Check In Different Copies

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

To check in a different number of copies than what you expect:

1. Within the Common Tasks group of wizards, click the Check In wizard.
2. Type in your search terms in the Search for field and click Search.
3. If more than one record matches your search, select the one you want and click Check In Issues.
4. Click Different Copies.
5. Type the number of copies you received.
6. Type a receipt comment if needed.
7. Click Check In Copies Now.

<table>
<thead>
<tr>
<th>Basic info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enumeration: V. 32 NO. 1</td>
</tr>
<tr>
<td>Chronology: SEP 2011</td>
</tr>
<tr>
<td>Copies received: 2</td>
</tr>
</tbody>
</table>

Issue received.

<table>
<thead>
<tr>
<th>Distribute Copies Received</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holding code</td>
</tr>
<tr>
<td>ARSERIAL</td>
</tr>
</tbody>
</table>

OK

8. Click OK.

9. From here you can:
   - Click Next Issue to check-in another issue of the same title.
   - Click New Search to perform the check-in process for another serial title.
   - Click Close to exit the wizard.

**Check In Issues by Barcode**

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

**To check in by barcode:**

1. Within the Common Tasks group of wizards, click the Check In wizard.

2. On the Select Search window, select Bar SICI in the Index drop down. If you do not have a barcode scanner, but still want to enter the issue’s barcode, use the HR SICI option.

   If the issue has no SICI printed on it, but the ISSN does appear on the piece, type the ISSN in the text box. The ISSN must be typed in the form 9999-1111. The first matching SISAC ID field in a control record appears as a result.

3. Scan the issue’s barcode if you chose Bar SICI, or enter it into the box if you selected HR SICI and click Search.
4. Verify that the copy in hand is the Expected Issue.
5. Click **Check In Now** or press Enter.
6. From here you can:
   - Click **Next Issue** to check-in another issue of the same title.
   - Click **New Search** to perform the check-in process for another serial title.
   - Click **Close** to exit the wizard.

**Generating Predictions When Checking-In**

**To generate additional predictions upon check-in:**
1. Within the Common Tasks group of wizards, click the **Check In** wizard.
2. Type in your search terms in the Search for field and click **Search**.
3. If more than one record matches your search, select the one you want and click **Check In Issues**.
4. Click **Generate Predictions**.
5. Make any necessary changes to the Enumeration, Date First Prediction, and/or Date Expected. The Enumeration, Date First Prediction, and Date Expected should start from the last prediction record in the Expected tab of the serial control record.

6. Click Generate Predictions.

7. Click Save Prediction.

8. Click OK.
Once you have saved the predictions, you will see the Check In Issues screen and may continue with the check-in process.

### Correcting Check-in Errors

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. If copies were created upon check in, the copies will need to be removed before they can be received again. Also, if the OPAC reflects the most recently arrived issues, this will need to be adjusted if you “unreceive” an issue.

#### Unreceive an Issue

Issue may accidentally be received. Use the Modify Control wizard to “unreceive” an issue.

**To “unreceive” an issue:**

1. Within the Common Tasks group of wizards, click the Modify Control wizard.

2. Type in your search terms in the Search field and click **Search**.

3. If more than one record matches your search, select the one you want and click **Modify Control**.

4. Click the **Received** tab.
5. If necessary, sort the order of the received issues that display. This can be done either by the Order of issues or Sorted by options.

6. Click the Unreceive Issue(s) tool.

7. Select the box of each issue you want to unreceive or select the Unreceive All Issues check box.

8. Click Unreceive Issue(s).

9. Click OK.
Removing the 599 Entry

If the serial control record is set to update the 599 recently arrived note in the bibliographic record of the serial title, deleting a received issue will not automatically remove the 599 entry from the bibliographic record.

Therefore, you will need to remove it manually using the Modify Bibliographic Description helper in the Modify Control wizard if available. If this helper is not available, you can use the Modify Title wizard to accomplish the same task.

The next section of this training guide discusses how to have the serial control record update the 599 Recently Arrived note.

To remove the Recently Arrived note information:

1. Within the Common Tasks group of wizards, click the Modify Control wizard.

2. Type in your search terms in the Search for field and click Search.

3. If more than one record matches your search, select the one you want and click Modify Control.

4. Click the Modify Bibliographic Description helper.

5. In the Bibliographic tab, click on the 599 entry and remove the information of the unreceived issue. If you are a central check in library, you will see more than one 599 tag. Remove the information for the correct library. The tags are in order of the libraries as listed in the Distribution tab of the control record.

   You can also remove the entire tag by right-clicking on the entry and selecting Delete Field from the menu.

6. Click Save.

7. Click Close.

8. Click Close again to exit the wizard.
Removing Item Records

If copies were created when the issues were received, when you unreceive an issue you will need to remove the copies before receiving the issue again. This cannot be done in the Serial Control toolbar and must be accomplished by using a Cataloging wizard.

The next section of this training guide discusses how to have the serial control record create volume holdings.

**To remove item records:**

1. Navigate to the Cataloging toolbar and click the Call Number and Item Maintenance wizard.
2. Type in your search terms in the Search for field and click **Search**.
3. If more than one record matches your search, select the one you want and click **Modify Control**.
4. Click the Call Number/Item tab.
5. Select the box next to the item you want to remove.
6. Click **Delete**.
7. Click **Yes**.
8. Click **Close**.

Removing MARC Holdings

If MARC holdings were updated when the issues were received, when you unreceive an issue you will need to correct the MARC holdings manually.

How to have the serial control record update the MARC holdings will be discussed in the next section of this training guide.

**To correct MARC holdings information:**

1. Within the Common Tasks group of wizards, click the **Modify Control** wizard.
2. Type in your search terms in the Search for field and click **Search**.
3. If more than one record matches your search, select the one you want and click **Modify Control**.
4. Click the button under the Location-Linked To column for the appropriate library.

5. Select the 863 field to remove.

6. Either right click on the field and click **Delete Field** or click the **Delete the Current Field** helper.

7. Click **Save**.

8. Click **Close**.

9. Click **Close** again to exit the wizard.

Removing MARC Holdings information can also be done in the **Modify Title** wizard in the Cataloging toolbar.
Claiming Issues

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.

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 unreceived copies.
- If no copies are received by the Date to Claim, the Prediction as Late report may be run to create ISSUELATE claim records.
- If serials 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 on the Claimed tab.

In addition to creating a claim record, the vendor must be notified. Claim information to the vendor is automatically entered by the system when either the Serial Claim Notices report or X12 Serial Claim Transactions report has been run. If you are placing claims by telephone, you may also manually enter claim information.

In this section you will learn to:

- Create a claim manually.
- Create claims with reports.
**Manual Claiming**

Creating claims manually is particularly important when you need to claim damaged issues. This is done using the *Modify Control* wizard.

To create a claim manually:

1. Within the Common Tasks group of wizards, click the *Modify Control* wizard.
2. Type in your search terms in the Search for field and click **Search**.
3. If more than one record matches your search, select the one you want and click **Modify Control**.
4. Click the **Claimed** tab.
5. Click the **Create a Claim** tool.
6. Select the issue you want to claim and click **Create Claim**.
7. Using the drop down, select an appropriate claim reason.

Number expected: 1
Date to claim: 10/12/2011
Claim reason:
Times claimed:
Response code:

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.

You do not need a Response code. This is used with EDI reports when claiming serial issues.

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.

10. Click **Close**.
11. Click Close.

**Claiming with Reports**

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

- Prediction as Late
- Serial Claim Notices

**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 field. 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 field 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.

*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.*

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 field of the claim record. With delivered policies, the claim reason is ISSUELATE.

For libraries that will not be using WorkFlows reports to notify the vendor of claims, this list can be used to search for titles that were physically received but never checked-in using the Check In wizard. Staff may also use this list as a reference when phoning a vendor regarding claims or composing an email message to the vendor.

For libraries that want to fax or email a vendor a list of claimed serial issues, the Serial Claim Notices report can be used. For libraries using EDI (Electronic Data Interchange) to notify vendors of serial claims, the X12 Serial Claim Transaction report will be used.

**To schedule the Prediction as Late report:**

1. Navigate to the Reports toolbar and click the *Schedule New Reports* wizard.

2. Click the *Serial* tab.

3. Double-click the Prediction as Late report or highlight it and click *Setup & Schedule*.

4. Click the *Serial Control Selection* tab.

5. Click the *Library* gadget and select your library from the list. If you are running this for all of your libraries or if you are a single library site, you do not need to make this selection.

6. Click *Schedule*.

7. Click *Daily* if you want to run this report daily. Click *Weekly* and select the days of the week you want to run this report. Or click *Monthly* and select the day(s) of the month you want to run this report.
8. Click a date in the calendar to indicate which date to start running the report.

9. Change the time that you would like the report to run.

10. Click Schedule.

11. Click Close.

Serial Claim Notices Report

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

An issue is not actually claimed in SirsiDynix Symphony 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.

To learn how to run X12 reports, refer to the SirsiDynix Symphony Electronic Data Interchange (EDI) training guide.

The Serial Claim Notices report allows you to identify issues from a 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.

The serial control record for the serial title must be linked to a vendor cycle in order to be selected by the report.

To schedule the Serial Claim Notices report:

1. Within the Reports toolbar, click the Schedule New Report wizard. ![Schedule New Report](image)

2. Click the Serial tab.

3. Double-click the Serial Claim Notices report or highlight it and click Setup & Schedule.

4. To create notices for a specific vendor, click the Vendor Selection tab. To create notices for all serial vendors, skip to step 8.

5. Click the List of Specified Vendors option.

6. Enter the appropriate fiscal cycle.

7. Type the Vendor IDs in the Vendor IDs field.
8. Click the **Serial Control Selection** tab.

9. Click the **Library** gadget and select your library from the list. If you are running this for all of your libraries or if you are a single library site, you do not need to make this selection.

10. Click the **Serial Claim Notice** tab.

11. Select the Count as a Notice Sent check box. This will update the Date claimed field in the Claims information of the claim record.

12. Click **Schedule**.

13. Click **Daily** if you want to run this report daily. Click **Weekly** and select the days of the week you want to run this report. Or click **Monthly** and select the day(s) of the month you want to run this report.

14. Click a date in the calendar to indicate which date to start running the report.
15. Change the time that you would like the report to run.

16. Select the Auto Email to Recipients with Email Addresses in their Patron Record check box to send the notice automatically to the vendor.

   An email address must exist in the Addresses tab of the vendor record for notices to be sent automatically.

17. Click Schedule.

18. Click Close.

   You can also save this as a template first and then schedule it to run regularly.
Additional Serial Wizards

There are additional serial control wizards that will allow staff to display, modify, and delete control records.

In this section you will learn to:

- Display serial control records.
- Modify serial control records.
- Delete serial control records.

Display Control Wizard

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 a control record:

1. Within the Common Tasks group of wizards, click the Display Control wizard.

2. Type in your search terms in the Search for field and click Search.

3. If more than one record matches your search, select the one you want and click Display Control.
Once you have finished viewing the record, click Close.

**Modify Control Wizard**

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 modify a control record:**

1. Within the Common Tasks group of wizards, click the *Modify Control* wizard.

2. Type in your search terms in the Search for field and click **Search**.

3. If more than one record matches your search, select the one you want and click **Modify Control**.
4. Make any necessary changes and click **Modify Control**.

5. Click **Close**.

**Replacing Patterns**

Publishers may change the frequency of a serial. For example, a monthly journal may change to a bimonthly publication. The **Replace Patterns** helper will allow you to modify publication pattern information.

**To replace the publication pattern:**

1. Within the Common Tasks group of wizards, click the **Modify Control** wizard.

2. Type in your search terms in the ***Search for*** field and click **Search**.

3. If more than one record matches your search, select the one you want and click **Modify Control**.

4. Click the **Patterns** tab.

5. Click the **Replace Patterns** helper.

6. In the **Select a Pattern Template** window, select the desired pattern from the list.

7. Click **Replace Patterns**.

8. Click **Modify Control**.
If the serial control record contains expected issues in the **Expected** tab, these will need to be removed and new predictions will need to be generated to match the new pattern of the publication. Follow the steps below to remove existing predictions.

### Removing Predictions

You can remove serial issues from the **Expected**, **Claimed**, and **Received** tabs of a serial control record.

On occasion, predictions must be removed then predicted again because of changes to the publication, such as enumeration.

**To remove predictions:**

1. Within the Common Tasks group of wizards, click the *Modify Control* wizard.
2. Type in your search terms in the Search for field and click **Search**.
3. If more than one record matches your search, select the one you want and click **Modify Control**.
4. Click the **Expected** tab.
5. Click the **Delete Prediction(s)** tool.
6. Click the Remove All Predictions check box.
7. Click **Delete Predictions**.

![Predicted Issue(s) Removed]

The following issue(s) were removed:

<table>
<thead>
<tr>
<th>Enumeration</th>
<th>Chronology</th>
</tr>
</thead>
<tbody>
<tr>
<td>V. 46 NO. 3</td>
<td>JUL/SEP 2011</td>
</tr>
<tr>
<td>V. 46 NO. 4</td>
<td>OCT/DEC 2011</td>
</tr>
<tr>
<td>V. 47 NO. 1</td>
<td>JAN/MAR 2012</td>
</tr>
<tr>
<td>V. 47 NO. 2</td>
<td>APR/JUN 2012</td>
</tr>
<tr>
<td>V. 47 NO. 3</td>
<td>JUL/SEP 2012</td>
</tr>
<tr>
<td>V. 47 NO. 4</td>
<td>OCT/DEC 2012</td>
</tr>
<tr>
<td>V. 48 NO. 1</td>
<td>JAN/MAR 2014</td>
</tr>
<tr>
<td>V. 48 NO. 2</td>
<td>APR/JUN 2013</td>
</tr>
<tr>
<td>V. 48 NO. 3</td>
<td>JUL/SEP 2013</td>
</tr>
<tr>
<td>V. 48 NO. 4</td>
<td>OCT/DEC 2013</td>
</tr>
</tbody>
</table>

8. Click **OK**.

9. If additional predictions must be deleted, repeat steps 5-8 until all predictions have been removed.

If you need to create new predictions for the publication, click the **Generate Predictions** helper.

Enter the Enumeration, and modify the Date First Prediction and Date Expected. Click **Generate Predictions** and save your predictions.

10. Click **Close** to exit the wizard.

To increase the number of issues to display in the screen, change the Number of Issues per Browse Screen value in the **Modify Control** wizard's properties.
Generating Additional Predictions

When the last expected issue is received, additional predictions will need to be created to continue managing the receipt of the serial. This can be done in the Check In wizard or the Modify Control wizard. The steps below detail how to create new predictions in the Modify Control wizard. Refer to page 115 for the steps to creating predictions in the Check In wizard.

To create additional predictions:

1. Within the Common Tasks group of wizards, click the Modify Control wizard.

2. Type in your search terms in the Search for field and click Search.

3. If more than one record matches your search, select the one you want and click Modify Control.

4. Click the Generate Predictions helper.

5. Make any necessary changes. The enumeration, Date First Prediction, and Date Expected should start from the last prediction record in the Expected tab.

Removing Received Issues

Removing received issues from the Received tab of the serial control record will permanently remove them, and they will not appear again on the Expected tab.

If the receipt being removed is a complete receipt, meaning that the number of copies received is exactly equal to the number of copies expected, the wizard automatically removes the prediction when the user removes the receipt. Updates to the bibliographic, item, and MARC holdings are not reversed. The following modifications may need to be made to a catalog, holding, or item record depending on how the control record is defined:

- If MARC holdings were updated when these issues were received, you will need to correct the MARC holdings manually.
- If copies were created when these issues were received, you will need to remove the copies.
- If 599 Recently Arrived notes were created, they will need to be deleted.
For steps to removing MARC holdings, copies, and/or 599 entry information, refer to the **Checking In and Working with Serial Issues** of this guide.

If the receipt being removed is a partial receipt, meaning the number of copies received is not equal to the number of copies expected, and/or the receipt has a claim attached, a warning will display. The warning lists the enumeration and/or chronology of the issue with a warning dialog. You may elect not to proceed and investigate the situation. If you proceed with the remove, all receipts, all claims, and the prediction will be removed. Updates to the bibliographic, item and MARC holdings are not reversed. Modifications may need to be made to a catalog, holding, or item record depending on how the control record is defined.

You may also remove receipt records using the Delete Received Issues report in the **Serial** group of reports.
Linking a Serial Control to an Order

To link a serial control to an order:

1. Within the Common Tasks group of wizards, click the Modify Control wizard.

2. Type in your search terms in the Search for field and click Search.

3. If more than one record matches your search, select the one you want and click Modify Control.

4. Click the Subscription tab.

5. Verify the copies to receive, number of issues, and expiration date.

6. Click Order History.
7. Click Add Order.

8. Using the drop down, select a valid, current fiscal cycle.

9. If necessary, select an acquisition library from the Library list.

10. Click the Order ID gadget.

11. Select an order in the specified fiscal cycle.

12. Type the line number associated with the subscription title you are entering. The order line you select cannot be linked to a bibliographic record other than the one linked to the serial control record.
13. Click OK.

14. Click OK.

This order will now appear as the current order. Vendor information defaults to the information in the order. Vendor information for subscriptions linked to orders cannot be modified from serial control wizards.

For further information about Order History within serial control records, refer to the Workflows online Help topic “Linking and Maintaining Subscription Orders.”
Remove Control Wizard

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 a serial control record:

1. Within the Common Tasks group of wizards, click the Remove Control wizard.

2. Type in your search terms in the Search for field and click Search.

3. If more than one record matches your search, select the one you want and click Remove Control.

4. Click Remove Control.

   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 record.

5. Click OK.

6. Click Close.
Routing and Binding

In this section, you will learn to:

- Create a routing list.
- Indicate how and when issues should be bound.

Creating a Routing List

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 Check In wizard or serial reports.

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. Within the Common Tasks group of wizards, click the Modify Control wizard.
2. Type in your search terms in the Search for field and click Search.
3. If more than one record matches your search, select the one you want and click Modify Control.
4. Click the Routing tab.
5. Click the Create a Routing tool.

6. If necessary, change the number of the copy you want to route.

7. Using the User ID gadget, select the user for the routing and click OK.

8. Type the rank for the user and click Create Routing.

9. Repeat steps 5-8 until all users have been added to the routing list.
10. Click **Close** to exit the wizard.

For more information about modifying, transferring, or duplicating routing lists, refer to the WorkFlows online Help topic “FAQs: Creating and Modifying Routing.”

### 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.

<table>
<thead>
<tr>
<th>Basic</th>
<th>Patterns</th>
<th>OPAC Display</th>
<th>MARC Holdings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subscription</td>
<td>Distribution</td>
<td>Binding</td>
<td>Expected</td>
</tr>
</tbody>
</table>

- **Number to Bind** field contains the number of issues that will be bound in a single volume.
- **Copies to Bind** field contains the number of copies that will be bound in a single volume.
- **Type of Binding** field 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.
- **Material** field 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.
- **Color** field 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 field.
- **Binding Title** field 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** field 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 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** field may contain the date you send the issues to the bindery.

Once you have entered the necessary fields to track items that need to be bound, you can run the Serial Control Records report to generate a list.

**To generate a list of titles to be sent to be bound:**

1. Navigate to the Reports toolbar.
2. Click the *Schedule New Reports* wizard.
3. Click the **Serial** tab of reports.
4. Double-click the Serial Control Records report or highlight it and click *Setup & Schedule*.
5. Click the **Serial Control Selection** tab.
6. Using the *Date to Bind* gadget, select a date or range of dates.
7. Make any other necessary selections, such as Number of Issues to Bind, Number of Copies to Bind, Binding Type or Binding Material.

8. Click the **Sorting** tab and select how you want the list to sort.

9. Click the **Serial Control Printing** tab and select the preferred output.
10. Select the check box next to Bindery to print binding information such as date to bind, number to bind, binding type, etc.

11. Click Run Now to run the report now; or, click Schedule to run the report at a later time.
Centralized Serial Control

SirsiDynix Symphony allows multi-library systems to centralize serial control record maintenance and check-in procedures. Multi-library systems implement this process when a branch or headquarters manages serial subscriptions centrally. After serial 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 the 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 e-Library holdings display for each of the branches. One control record can create and update a 599 tag in the bibliographic record, volume holdings, and MARC holdings for each branch represented in the control record.

Different Holding Code policies representing libraries, serial item types, and locations are necessary in order to correctly update the e-Library display for each branch that will add serial issues to the collection.

Creating a Serial Control for Centralized Check-In

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.

To create a control record for multiple libraries:

1. Within the Common Tasks group of wizards, click the Create Control wizard.
2. Click the Index dropdown and select the index by which you choose to search. The index you prefer to search by can be set as the default in the properties of the wizard.
3. Type in your search terms in the Search for field and click Search.
4. If more than one record matches your search, select the one you want and click Create Control.
5. Select the library that “owns” the serial control record.

6. Click OK.

7. Make any necessary changes to the Basic, Patterns, and OPAC Display tab.

8. Click the Subscription tab.

9. Type the number of copies you expect to receive for all branches or locations.
10. Make any other necessary changes to the **Subscription** tab, such as adding a Vendor ID and Fiscal cycle.

11. Click the **Extended Info** tab.

12. Enter any check in notes to display when receiving issues with the **Check In** wizard. Notes can be added to remind staff where issues should be distributed after they are received.

If you go to the **Subscription** tab at this point and try to modify the distributions by clicking the **Create a Distribution** or **Modify a Distribution** tool, you will receive the following message:
13. Click Create Control.

14. Take one of the following actions:
   
   - If the Allow Automatic Prediction of Issues check box is selected in the Patterns tab, click Close to exit the Get Expected Issues Info window. Then click OK.
   
   - If the Allow Automatic Prediction of Issues check box is not selected, click OK.

15. Click the Distribution tab.

16. Click the Create a Distribution tool.

   If you are modifying the first distribution with the Modify a Distribution tool, you will be taken to the Creating a Serial Distribution window automatically.
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).

17. Using the drop down, select a Holding code for the next distribution/library.

18. Verify the Copies expected or change the value.
19. If necessary, change the number of Copies to Add to Catalog.

20. Click **Create Distribution**.

If you are expecting more than two copies, the Copies Distributed and Copies Not Distributed values update in the window.

21. If necessary, repeat steps 17-20 to distribute all copies accordingly.

22. When you have distributed all of the copies, the screen will go back to the control record.

23. To generate predictions, click the **Generate Predictions** helper.

24. In the Get Expected Info window, type the volume and number of the next expected issue in the V. and NO. fields.

25. Enter the Chronology.

26. Type or use the **Date First Prediction** gadget to enter a date.

27. Type or use the **Date Expected** gadget to enter a date.

28. Click **Generate Predictions**.
29. Click **Save Prediction**.

30. Click **OK**.

31. Click **Close**.

If you go to the **Expected** tab of the serial control record and click the Receipt status platform, you will see the prediction and distribution information for that particular issue.
Centralized Check-in

The steps for receiving issues are not different from 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.

To check-in multiple copies for multiple libraries:

1. Within the Common Tasks group of wizards, click the Check In wizard.

2. Type in your search terms in the Search for field and click Search.

3. If more than one record matches your search, select the one you want and click Check In Issues.

4. If check-in notes appear, click OK.

5. Verify that the copy in hand is the Expected Issue.

6. Click Check In Now or press Enter. You may also hold down the Alt key and press the letter O.

If you are creating copies upon check-in, you will need to enter the Item ID for each issue.
OPAC Display

How the holdings display for multiple distributions depends on how the serial control record was set up.

Below is how a serial that does not add volume holdings, but updates MARC holdings appears in e-Library:

<table>
<thead>
<tr>
<th>Item Information</th>
<th>Catalog Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>National geographic</td>
</tr>
<tr>
<td>Author</td>
<td>National Geographic Society (U.S.)</td>
</tr>
<tr>
<td>Publisher:</td>
<td>National Geographic Society,</td>
</tr>
<tr>
<td>Pub date:</td>
<td>c1959-</td>
</tr>
<tr>
<td>Pages:</td>
<td>Y.</td>
</tr>
<tr>
<td>Item info:</td>
<td>1 copy available at E. A. Arrowood Foundation Library</td>
</tr>
</tbody>
</table>

ARROWOOD

LOCATION: PERIODICAL--
HOLDINGS: Y219:no.9 (2011:Sept.)

CAFFEY

LOCATION: PERIODICAL--
HOLDINGS: Y219:no.9 (2011:Sept.)

FEW

LOCATION: PERIODICAL--
HOLDINGS: Y219:no.9 (2011:Sept.)

MOYERS

LOCATION: PERIODICAL--
HOLDINGS: Y219:no.9 (2011:Sept.)

Below is a serial record that has volume holdings added, but does not update MARC holdings:

<table>
<thead>
<tr>
<th>Item Information</th>
<th>Catalog Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Scientific American</td>
</tr>
<tr>
<td>Author</td>
<td>Munn &amp; Co.</td>
</tr>
<tr>
<td>Publisher:</td>
<td></td>
</tr>
<tr>
<td>Pages:</td>
<td></td>
</tr>
<tr>
<td>Item info:</td>
<td>7 copies available at E. A. Arrowood Foundation Library, Charles P. Few Free Library, Patrick Caffey Public Library, and Tracy Movers (Pre-Memorial) Library</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Holdings</th>
<th>Copies</th>
<th>Material</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>E. A. Arrowood Foundation Library</td>
<td>1</td>
<td>Current Issue on Shelf</td>
<td>Periodicals</td>
</tr>
<tr>
<td>Patrick Caffey Public Library</td>
<td>1</td>
<td>Non-Circulating Magazine</td>
<td>Periodicals</td>
</tr>
<tr>
<td>Charles P. Few Free Library</td>
<td>1</td>
<td>Current Issue on Shelf</td>
<td>Periodicals</td>
</tr>
<tr>
<td>Tracy Movers (Pre-Memorial) Library</td>
<td>1</td>
<td>Non-Circulating Magazine</td>
<td>Periodicals</td>
</tr>
</tbody>
</table>
Below is a display of a serial control record that updates the 599 Recently Arrived note for each library:

<table>
<thead>
<tr>
<th>Item Information</th>
<th>Catalog Record</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Scientific American</strong></td>
<td></td>
</tr>
<tr>
<td><strong>ISSN:</strong></td>
<td>0036-8733</td>
</tr>
<tr>
<td><strong>Key title:</strong></td>
<td>Scientific American</td>
</tr>
<tr>
<td><strong>Title:</strong></td>
<td>Scientific American,</td>
</tr>
<tr>
<td><strong>Publication info:</strong></td>
<td>New York : Munn &amp; Co.</td>
</tr>
<tr>
<td><strong>Current frequency:</strong></td>
<td>Monthly, Nov. 1921-</td>
</tr>
<tr>
<td><strong>Volume/date range:</strong></td>
<td>Began with vol. 1, no. 1 (Aug. 28, 1845).</td>
</tr>
<tr>
<td><strong>Volume/date range:</strong></td>
<td>v. 14, no. 42 (June 25, 1859) ; new ser., v. 1, no. 1 (July 2, 1859).</td>
</tr>
<tr>
<td>Recently arrived:</td>
<td>ARKWOOD—OCT 2011; SEP 2011;</td>
</tr>
<tr>
<td>Recently arrived:</td>
<td>CAFFEY—OCT 2011; SEP 2011;</td>
</tr>
<tr>
<td>Recently arrived:</td>
<td>FEW—OCT 2011; SEP 2011;</td>
</tr>
<tr>
<td>Recently arrived:</td>
<td>MOWERS—SEP 2011;</td>
</tr>
<tr>
<td><strong>Subject term:</strong></td>
<td>Technology—Periodicals.</td>
</tr>
<tr>
<td><strong>Subject term:</strong></td>
<td>Science—Periodicals.</td>
</tr>
<tr>
<td><strong>Subject term:</strong></td>
<td>Exakte wissenschaften.</td>
</tr>
<tr>
<td><strong>Subject term:</strong></td>
<td>Technologie—Périodiques.</td>
</tr>
<tr>
<td><strong>Subject term:</strong></td>
<td>Sciences—Périodiques.</td>
</tr>
<tr>
<td>Absorbed:</td>
<td>People's journal Nov. 1854</td>
</tr>
<tr>
<td>Absorbed:</td>
<td>Scientific American monthly Nov. 1921 0740-6485</td>
</tr>
</tbody>
</table>
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 can auto-distribute received issues. SirsiDynix Symphony 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.

A Behavior property of the Check In wizard determines whether this manual distribution can occur.
Manual Distribution Partial Shipments

Staff can determine where issues should be distributed.

Only three copies were received instead of four

Staff decides how to distribute the copies to each holding code
Appendix A: Serial Reports

The Serial reports assist in the maintenance of periodical publications that are received on subscription or on some other regular basis. They can accomplish the following tasks:

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

In this section you will learn to:

- List serial control records.
- List serial control records not linked to vendors.
- List serial predictions.
- Rollover vendor cycles in serial control records.

Serial Control Records Report

The Serials Control Records report produces a list of serial control records. These lists may be used in a variety of ways. For example, you may need a list of every title under serial control whose subscription will expire within the next 90 days. You may then set up this report so that it runs every 90 days, showing what subscriptions are going to expire in the next three months.

To run the Serials Control Records report:

1. Click the Schedule New Reports wizard.
2. Click the Serial tab of reports.
3. Double-click the Serial Control Records report or highlight it and click Setup & Schedule.
4. Click the Serial Control Selection tab.
5. Make selections based on the information you need from the report. For example, if you want a list of serial control records for your library that have been cancelled, make the following selections:

- Use the *Library* gadget to select a library or libraries from the list.
- Use the *Status* gadget to select CANCELLED from the list.

6. Another example might be the need for a list of titles under serial control whose subscription will expire within the next 90 days. Make the following selections for this list:

- Use the *Library* gadget to select a library or libraries from the list, if necessary.
- Use the *Subscription Expiration Date* gadget to select a date range.
7. Click the **Serial Distribution Selection** tab.

8. Make any necessary selections.

9. Click the **Sorting** tab and select how you want the list to sort.

10. Click the **Serial Control Printing** tab and select the boxes next to the information you want to print.
11. Click Run Now to run the report now; or, click Schedule to run the report at a later time.

Serial Control not Linked to Vendors Report

The Serial Controls not Linked to Vendors report is used for finding serial control records with the following characteristics:

- The records linked to a vendor cycle record with predictions or orders that link to a different vendor cycle.
- The records do not link to any vendor at all.

Although, in certain circumstances, it is valid to have a mismatch between serial control record links to vendors and prediction (on order) links to vendors, this can cause a problem with issue claiming. This report helps you identify these mismatched links.

To run the Serial Controls not Linked to Vendors report:

1. Click the Schedule New Reports wizard.
2. Click the Serial tab of reports.
3. Double-click the Serial Controls not Linked to Vendors report or highlight it and click Setup & Schedule.
4. Click the Serial Control Selection tab.
5. Make any necessary selections, such as the serial control library using the *Library* gadget.

6. Click **Run Now** to run the report now; or, click **Schedule** to run the report at a later time.
List Serial Predictions Report

The List Serial Predictions report produces a list of issue predictions in your library for selected criteria.

To run the List Serial Predictions report:

1. Click the Schedule New Reports wizard.

2. Click the Serial tab of reports

3. Double-click the List Serial Predictions report or highlight it and click Setup & Schedule.

4. Click the Vendor Cycle Selection tab and make any necessary selections.

5. Click the Vendor Selection tab and make any necessary selections.

6. Click the Serial Control Selection tab and make any necessary selections.
7. Click the **Prediction Selection** tab and make any necessary selections. For example, if you want a list of predictions that are expected before the report run date and still have copies expected to see what has not yet arrived, make the following selections:

- Using the *Date Expected* gadget, select a date or date range.
- Select Yes for Any Copies Expected
- Select No for Any Copies Received

![Image of Prediction Selection tab]

8. Click the **Receipt Selection** tab and make any necessary selections. For example, if you want a list of predictions that were checked in on a certain day by a particular staff member when item records were created, make the following selections:

- Using the *Date Received* gadget, select a date or date range
- Using the *Create By* gadget, select a user access from the list
9. Click the **Serials Claim Selection** tab and make any necessary selections. For example, to retrieve a list of predictions that have been claimed due to damage, make the following selections:

- Using the *Date Claimed* gadget, select a date or date range, if necessary
- Using the *Claim Reason* gadget, select the reason of DAMAGE from the list

10. Make any necessary selections.

11. Click **Run Now** to run the report now; or, click **Schedule** to run the report at a later time.
Delete Received Issues Report

The Delete Received Issues report allows you to remove serial issues in batch. This report will assist you in deleting older issues that are no longer a part of the library’s physical collection.

When this report is scheduled to remove the serial issues, it will do so without further prompting, and so it is recommended that you run this report in test mode first. On the Update Option tab, clear the Update Database Records check box to run this report in test mode. A list of records to be removed will be printed in the report output. It is also recommended that you run the report to actually remove serial issues after a full system backup.

To run the Delete Received Issues report:

1. Click the Schedule New Reports wizard.
2. Click the Serial tab of reports.
3. Double-click the Delete Received Issues report or highlight it and click Setup & Schedule.
4. Click the Receipt Selection tab.

5. Make any necessary changes such as the Date Received. By default, the report is set to remove received issues since the beginning of the system until 24 months before the report runs. This is to ensure that you will not select predictions that have not yet been received.

6. Make any additional selections in the available tabs of the report.
At this point you may want to run the report in test mode by skipping to step 8.

7. Click the **Update Option** tab.

8. Select the Update Database Records check box.

9. Click **Run Now** to run the report now; or, click **Schedule** to run the report at a later time.

**Rollover Vendor Cycles in Serial Control Records Report**

To update the vendor cycle links in serial control records from one fiscal period to the next, you can do this in batch with the Rollover Vendor Cycles report. This report is located in the Serial group of reports.

In order to facilitate automatic claiming of serials, it is necessary to link the serial control record to an existing vendor record which is also associated with a fiscal cycle. This is done in the **Subscription** tab of the serial control record as seen below.

Running this report to automatically rollover vendor information links will assist in serial claiming functions when claims span vendor fiscal cycles.

Once you have successfully rolled over all of your vendors, funds, and orders, you can also run the Rollover Vendor Cycles report to update the serial control records.

This report is also discussed in the SirsiDynix Symphony Acquisitions Rollover training guide.
To run the Rollover Vendor Cycles in Serial Control Records report:

1. Click the Schedule New Reports wizard.
2. Click the Serial tab of reports.
3. Double-click the Rollover Vendor Cycles in Serial Control Records report or highlight it and click Setup & Schedule.
4. Click the Old Fiscal Cycle tab.
5. Select a fiscal cycle in the Old Fiscal Cycle drop down. This is a required field.
6. Click the Serial Control Selection tab and make any necessary selections.
7. Click the Vendor Selection tab and make any necessary selections.
8. Click the New Fiscal Cycle tab and select the new fiscal cycle from the drop down list.
9. Click the **Sorting** tab and select how you would like the output to sort.

10. Click the **Update Option** tab.

11. Click the box next to Update Database Records. If you wish to run this report in test mode first, leave this box unchecked.

12. Click **Run Now** to run the report now; or, click **Schedule** to run the report at a later time.

This report will update vendor cycles in serial control records if the following conditions are met:

- The library/new fiscal cycle/vendor record already exists on the system. If the new fiscal cycle does not exist, the serial control record will not be updated, and will be written to the report output with the message “Record not updated. New fiscal cycle does not exist.”

The library/new fiscal cycle/vendor record exists and there is no current purchase order link.

- The library/new fiscal cycle/vendor record exists, there is a purchase order link, and the PO plus line number for the current order already exists on the system. If the PO plus line number does not exist, the serial control record will not be updated, and
will be written to the report output with the message “Record not updated, Order ID/line number does not exist.

Refer to the WorkFlows online Help topic “FAQs: Linking and Maintaining Subscription Orders” for additional information.
Appendix B: Serial Control Properties and Configuration

Properties within the Serial Control wizards will facilitate the creation and modification of your serials and the check-in process of your issues.

Serial Control policies are used to create and modify pattern templates used for receiving serials, gather statistics about control records, and track claims and claim responses.

In this section you will learn to:

- Understand and make changes to the Check In wizard properties.
- Understand and make changes to the Display Control wizard properties.
- Understand and make changes to the Create Control wizard properties.
- Understand and make changes to the Modify Control wizard properties.
- Create Serial Control categories.
- Create claim reasons.
- Create Serial Control statuses.
- Understand Chronology policies.
- Understand Chronology Type policies.
- Understand and create serial patterns.
- Create name labels.
- Understand frequency.
- Understand and create holiday policies.
- Modify Serial Control extended information.
**Serial Control Properties**

Serial Control wizards have properties which provide window defaults and various control settings for each wizard. Making changes to properties can facilitate the check-in process or the creation, modification, or display of serial control records.

Administrators and supervisor-level staff have access to Behavior, Defaults, and Helpers properties. Other staff only has access to Defaults properties.

Changes made to the properties are saved on that user’s workstation. Properties can also be saved at the server level with the *Save Properties* wizard in the Utility toolbar.

**Check In Wizard Properties**

To set the Check In wizard properties:

1. Navigate to the Serial Control toolbar.
2. Right-click on the Check In wizard.
4. In the Behavior tab, if necessary, change the Search Library Preferences to determine which libraries should be accessible when searching titles.
5. To prevent staff from modifying issue information, combining issues, or receiving special issues, clear the respective boxes.
6. To allow the system to automatically distribute issues when using the **Different Copies** button in receiving, select the Auto Distribute Partially Received Issues box. This means that if all of the expected copies were not received, SirsiDynix Symphony will distribute the copies that were received equally across distributions. You will only use this if your library is configured to use serial distributions.

7. If you want to automatically create copies in the catalog when issues are received, select the Auto Create Copies for Received Issues box. This selection works for serials that are configured to add copies to the catalog. This creates auto-generated item IDs for the copies.

8. If you want routing lists for the issue to automatically print when they are received, click the Print Routing Lists for Received Issues box. Lists will only print for serials that have associated routing lists.
within the serial control record. Click the Print Routing Lists button to set the following default properties:

- **Print Routing Lists without Confirmation** – This keeps the wizard from pausing at each routing list copy and from asking you for confirmation before sending the routing list to the printer.

- **Receipt Header** – Use the *String List* gadget to type lines of text for the routing list header. Each line can have a maximum of 30 characters.

- **Receipt General Fields** – Use the *Receipt Fields* gadget to select the general receipt fields that will appear on the routing slip.

- **Receipt User Fields** – Use the *Receipt User Fields* gadget to select the user fields that will appear on the routing slip, such as name, User Address 1, and User Extended Info.

- **Receipt Footer** – Use the *String List* gadget to type lines of text for the routing list footer. Each line can have a maximum of 30 characters.

9. If you print routing lists, click one of the following options:

- **Default Printer** – if selected, routing lists will be printed on the workstation default printer with this printer’s default paper sizing.

- **Attached Receipt Printer** – if selected, routing lists will be printed to the receipt printer specified in WorkFlows client’s Receipt Printer menu.
10. Using the Include User Extended Info Entries drop down, select what user information will be included when routing lists are printed.

11. To print labels for issues as they are checked in, click the box next to Print Labels for Received Issues. And then click one of the following print label options:

   - Automatically – allows you to print labels without previewing them.
   - Print Preview – allows you to preview the labels before you print them.

12. Make any other necessary changes to the Behavior properties.

13. Click the **Defaults** tab.

14. Make any necessary changes such as the preferred search index, folder options, preferences for working with issues, and the convention for combining issues upon check in.

15. Click the **Helpers** tab.

16. Unselect the check boxes next to Helpers you do not want to display in the **Check In** wizard.

17. Click **OK**.
Display Control Wizard Properties

To set the Display Control wizard properties:

1. Right-click on the Display Control wizard.

2. Select Properties.

3. In the Behavior tab, if necessary, change the Search Library Preferences to determine which libraries should be accessible when searching titles.

4. Click the Defaults tab.

5. If you want to use a different search index when displaying serial control records, use the Search Index drop down to select the preferred index.

6. Unselect any of the check boxes next to the folder options to remove from view certain information within the serial control record.

With all of the Folder Options selected, here is how a serial control record will display:
With the following Folder Options selected, here is how a serial control record will display:

7. Make any other necessary changes to the Default properties.
8. Click OK.
Create Control Wizard Properties

To set the Create Control wizard properties:

1. Right-click on the Create Control wizard.

2. Select Properties.

3. In the Behavior tab, if necessary, change the Search Library Preferences to determine which libraries should be accessible when searching titles.

4. Unselect the box next to Generate New Control IDs Automatically if you want staff members to enter serial control record IDs.

5. If you do not need to select different libraries and/or holding codes when creating controls, unselect the box next to Prompt for Library when Creating a Serial Control. For example, this will not be necessary for a single library.

6. Make any other necessary changes to the Other Preferences, such as allowing for MARC holdings records modification or allowing modification of the vendor record while creating a serial control record.

7. Click the Defaults tab.

8. If you want to use a different search index when displaying serial control records, use the Search Index drop down to select the preferred index.
9. Use the Create Control Records for Library drop down to select the library for which you will be creating serial control records.

10. Use the drop down fields under Basic Info to add or change categories for a serial control record or its status.

11. If you do not want to allow predictions to be created as issues are checked in, unselect the check box next to Allow Automatic Prediction of Issues.

12. Under OPAC Display, uncheck the check box next to Automatically Update MARC holdings if you will not be updating MARC holdings as issues are checked.

By leaving this checked the MARC holdings options will automatically be set in the OPAC Display and Distribution tab of the serial control record.
13. If necessary, modify the number of most recently arrived issues and how they will display as issues are checked in.

14. Select a default holding code using the Holding Code drop down or use the Find Holding Code gadget.
15. Click the **Helpers** tab.

![Create Control - Set Properties](image)

16. Select the check boxes next to Helpers you want to display in the *Create Control* wizard, if necessary.

17. Click **OK**.

**Modify Control Wizard Properties**

To set the Modify Control wizard properties:

1. Right-click on the *Modify Control* wizard.

2. Select **Properties**.

3. In the **Behavior** tab, if necessary, change the Search Library Preferences to determine which libraries should be accessible when searching titles.

4. Unselect the check box next to Create a Serial Control Record if you do not want to allow for a new record to be created during a search if there is not a serial control associated with the title that was searched.

5. Make any other necessary changes to the Other Preferences, such as allowing for MARC holdings records modification or allowing
modification of the vendor record while creating a serial control record.

6. Click the **Defaults** tab.

7. If you want to use a different search index when displaying serial control records, use the Search Index drop down to select the preferred index.

8. Unselect any of the check boxes next to the folder options to remove from view certain information within the serial control record.

With all of the Folder Options selected, here is how a serial control record will display:
With the following Folder Options selected, here is how a serial control record will display:

9. Select a default holding code using the Holding Code drop down or use the *Find Holding Code* gadget.

10. Make any other necessary changes, such as preferences for working with issues and the order in which received issues should display.

11. Click the *Helpers* tab.

12. Select the check boxes next to Helpers you want to display in the *Modify Control* wizard, if necessary.
13. Click **OK**.
Serial Control Configuration Policies

Serial Control Configuration policies are used to gather statistics about serial control records, track claims and claim responses, and define chronology names and chronology lists. Serial pattern-type policies are used to relate standard serial frequencies to MARC code values, and to define default enumeration, chronology, and publication cycles in control records.

Serial Control Category 1 and Category 2

The Serial Control Category 1 and Category 2 policies denote a control record’s special characteristics for serial control statistical analysis. The library will determine the general purpose of this field and can be used as selection criteria in reports for generating detailed statistical breakdowns by library-defined characteristics. The categories are optional.

To create Serial Control categories:

1. Navigate to the Configuration toolbar.
2. Open the Serial Control Configuration group of wizards.
3. Click the Serial Control Category 1 wizard.
4. Click Create.
5. In the Name field, type the policy name.
6. In the Description field, type the policy description.
7. Click Save.
8. Repeat steps 4-7 until you have added all the necessary Serial Control categories.

9. Click Close to exit the wizard.

The same steps will apply to the creation of Serial Control Category 2 policies.

Serial Control Claim Reason

The Serial Control Claim Reason policy is used in serial control records to specify why a serial issue is being claimed, as seen in the screen shot below. Each Claim Reason policy defines a name, a type, a numeric code, and a line of text to be used in the claim notice text.
To modify a serial claim reason:

1. Within the Serial Control Configuration group of wizards, click the Serial Control Claim Reason wizard.

2. Double-click the claim reason you want to update or highlight it and click Modify.

3. Change the message located in the Text box. This is what appears in the claim notices sent to vendors.
4. Click **Save**.

5. Click **Close**.

**Creating a Serial Control Status**

Similar to the Serial Control Category policies, 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. This policy is used as selection in reports for generating detailed statistical breakdowns of library-defined characteristics.

For example, the library may need to indicate when a serial control record is for a title that has been changed by the publisher. A policy called **OLDTITLE** or something similar can be created to indicate this as a status for certain serial control records.

**To create a serial control status:**

1. Within the Serial Control Configuration group of wizards, click the **Serial Control Status** wizard.

2. Click **Create**.

3. In the **Name** field, type the policy name.

4. In the **Description** field, type the policy description.
5. Click Save.

6. Click Close.

Understanding Chronology

The Chronology policy provides the chronology designations, such as month or season, for each issue.

Within the Chronology policy are components you see in the MARC holding information of titles under serial control.

Along with the name and description of the Chronology policy is a code that contains the numeric value used in the 863 field of the MARC holding record. Below is an example of a serial control record set to update MARC holding information as issues are checked in. Notice that the 863 tag contains the code for the JAN and MAR Chronology policies.

The other attribute within the Chronology policy is the Holding Display that is seen in the MARC holding record summary that is displayed through the e-Library. Below is the same serial title set to update MARC holding records as seen in the OPAC along with the Chronology policy of March.
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 Customer Support.

Understanding 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. 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 is referenced again.

Here are the delivered Chronology Type policies in SirsiDynix Symphony:
Within the **Patterns** tab of the serial control record, the Chronology Type must be selected.

When the BIMONTH Chronology Type is selected, creating predictions for this title will require the following name list based on what exists in the Chronology Type policy:

JAN/FEB, MAR/APR, MAY/JUN, JUL/AUG, SEP/OCT, NOV/DEC
Here is the message you will receive if you use the incorrect name list for a bimonthly publication:

In order to generate predictions for this serial title, the Chronology Type in the Patterns tab must be changed to BIMONTH and the Chronology field must contain SEP/OCT 2011. Below is a list of predictions created by changing the information in the Chronology type in the Patterns tab of the serial control record:

Along with the name and description of the Chronology Type policy is an attribute specifying if special processing is required, and if so, what type of special processing.
In the example of the DATE Chronology Type, the special processing is set to Date. This attribute must contain exactly 12 Chronology policies, one for each month and in chronological order.

Below is an example of a weekly serial publication that uses the DATE Chronology Type in the Patterns tab of the serial control record.
Some Chronology Type policies will also contain the Caption attribute that defines the caption value that is used in the MARC holding record's 853 | j.

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 Customer Support.

Creating Name Labels

The Name Label policy is used by both the Serial Control and Acquisitions modules. For Serial Control, this policy provides enumeration captions. This policy appears on the Patterns tab of the serial control record.
New Name Label policies can also be created in the serial control record by clicking on the *Label* gadget.

To create a new name label:

1. Within the Serial Control Configuration group of wizards, click the *Name Label* wizard.

2. Click *Create*.

3. In the Name field, type the policy name.

4. In the Description field, type the policy description.

5. Click *Save*.

6. Click *OK*. 
Understanding Frequency and Patterns

The Frequency policy is used to specify the serial publication frequency.

Within each policy are a name, description, and code. The code is the attribute that contains a one-character alphabetic code from the Serials bibliographic fixed field element, Frequency.

This frequency code is also included in the Pattern templates delivered with the software. The structure of a pattern template policy includes enumeration, chronology, and a publication cycle.

These templates help expedite the process of filling in pattern information for the serial control record.
During the initial process of creating a serial control record, the *Create Control* wizard examines the MARC record’s frequency fixed box 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 box cannot be found, no pattern is selected. The system, however, will let you select one from a list as defined in the Serial Pattern policy.

![Image of Create Control: Select a Pattern Template dialog]

At times, it may be necessary to create a new pattern template when no approximate templates exist. You can create and customize a serial control pattern that you anticipate will be used in the future. This can be accomplished with the *Make This Pattern a Template* helper that is located within the *Modify Control* wizard.

![Image of Modify Control: Modifying Control ID SC-13 dialog]
This helper is only available if the WorkFlows login has access to the Serial Pattern wizard.

**To create a new serial pattern:**

1. Within the Serial Control Configuration group of wizards, click the Serial Pattern wizard.

2. Click Create.

3. In the Name field, type the policy name.

4. In the Description field, type the policy description.

5. With the Frequency Code drop down, select a frequency from the list.

6. To provide the caption of the enumeration pattern, check the boxes needed for the label.

7. Using the drop down, select a label from the list.
8. Type in the Limit to determine when a subdivision’s numbering pattern should start over, causing the enumeration in the subdivisions above it to be incremented by one.

9. Make any other changes in the Subdivision area, such as the enumeration using an alphabetic character pattern or if the numbering pattern is continuous.

10. Using the drop down, select the Chronology Type.

11. If you are using a CUSTOM Chronology Type, enter it into the Custom Chronology field.

12. Click the Publication Cycle gadget and define the publication cycle for the serial. Click OK.

13. Enter the Days to Claim.

14. Enter the Days to Subsequent Claim.

15. Type the Number of Issues that will be received over the course of the publication cycle.

16. Click Save.

17. Click Close.
Creating Holiday Policies

The holiday policy contains a specific date, and can be used in an omit cycle definition to manage dates on which an issue of a serial will not be published.

To create a holiday policy:

1. Within the Serial Control Configuration group of wizards, click the Holiday wizard.

2. Click Create.

3. In the Name field, type the policy name.

4. In the Description field, type the policy description.

5. Click the Date gadget.
6. Perform one of the following actions to create a holiday:

- To define an exact date, select a day and the month.
- To define a yearly holiday which falls on different dates each year, click the Weekday of Month helper. Select the day and week that the holiday falls on, and then select the month.

7. Click **OK**.

8. Click **Save**.

9. Click **Close**.
These holiday policies will be found in the **Patterns** tab when changing information in the *Publication Cycle* gadget using the *Omit Issues By* helper as seen below:
Serial Control Extended Info Format Policy

When using the Create Control or Modify Control wizards, you can add or modify extended information on the Extended Info tab. You can modify the format of the extended information fields on this tab using the Serial Control Extended Info Format wizard.

Only one Serial Control Extended Info Format policy is delivered. You cannot create, copy, or remove this format.

To remove an entry from the Serial Control Extended Info Format policy Entry ID Synonym List:

1. Within the Serial Control Configuration group of wizards, click the Serial Control Extended Info Format wizard.
2. Click the Entries tab.
3. To remove entries from the Extended Info tab of serial control records, click the Entry ID helper.
4. Highlight SERXINFO-T Entry ID Synonym List and click Modify.
5. Click the Entries gadget.
6. To remove an entry, highlight it in the List Selected and move it into the List to Choose From with the left-facing arrow.

7. Click **OK**.

8. Click **Save**.

9. Click **Close**.
To add a new entry ID to the Serial Control Extended Info Format policy:

1. Within the Serial Control Configuration group of wizards, click the Serial Control Extended Info Format wizard.

2. Click the Entries tab.

3. Click Create.

4. Click the Entry ID helper.

5. Click Create.

6. In the Name field, type the policy name.

7. In the Description field, type the policy description.

8. Click Save.

9. In the Entry ID field, select the Entry ID just created using the drop down.
10. Verify that Allow Edit/Create check box is selected.
11. Using the Data Type drop down, select ANY.
12. Click the Display tab.
13. Type a Label.
14. Click Create.
15. Click Save.
16. Click Close.
To add this new entry ID to the Serial Control Extended Info Format Entry ID Synonym List:

1. Click the Entry ID helper.
2. Highlight SERXINFO-T Entry ID Synonym List and click Modify.
3. Click the Entries gadget.
4. To add an entry, highlight it in the List to Choose From and move it into the List Selected with the right-facing arrow.
5. Click OK.
6. Click Save.
7. Click Close.
Appendix C: Printing Functionality

Screen Printing

Printing is available for the Check In and Display 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 on your PC, 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.

Printing 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.
- 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. Administrators and supervisor-level staff have access to Behavior properties which is where the Print Routing Lists for Received Issues option is located.

**Print Routing Lists for Received Issues**

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

To print routing lists for received issues:

1. Right-click on the *Check In* wizard.
2. Select Properties.
3. Within the Behavior tab, select the Print Routing Lists For Received Issues check box if not already selected.
4. Click the Print Routing Lists For Received Issues platform.

5. 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.

6. Click the Receipt Header gadget.
7. Type header text in the Enter String field 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.

8. Click **Save**.

9. Click the **Receipt General Fields** gadget.

10. 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.
11. Click **OK**.

12. Click the *Receipt User Fields* gadget.

13. 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.

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

14. Click **OK**.
15. Click the *Receipt Footer* gadget.

16. Type the footer text in the Enter String field 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.
17. Click **Save**.

18. Click **OK**.

19. If you are printing User extended information, select an appropriate set of entries with the Include User Extended Info Entries drop down.

20. Select an appropriate method for printing routing slips:

   - **Default Printer** – If selected, routing lists will be printed on the workstation default printer with this printer’s default paper settings (size and layout). This is the default printer option.

   - **Attached Receipt Printer** – If selected, routing lists will be printed to the receipt printer specified in WorkFlows Java client’s Preference/Peripherals/Receipt Printer menu.

21. Click **OK** to save all of the changes made within the **Behavior** tab.
Client Level Settings

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

To set up the receipt printer:

1. Click Preference in the WorkFlows menu.
2. Select Peripherals then Receipt Printer.

The Configuration window appears:

3. Select the Receipt Printer Available check box.
4. Using the Receipt Printer drop down, select the appropriate device from the list.
5. Make any other additional changes to the settings, such as Cash Drawer and Raster Driver.

6. Click the **Attributes** tab.

7. Use the **Font** gadget to select the font.

8. Select a measurement to use with the Name of Unit drop down.

9. Type a Page Width.

10. Type the width of the Left Margin and Right Margin.

11. Type the height of the Top Margin.

12. 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

<table>
<thead>
<tr>
<th>Option</th>
<th>Selected?</th>
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<tbody>
<tr>
<td>Print routing lists without confirmation</td>
<td>Yes</td>
</tr>
<tr>
<td>The receipt printer is set as default</td>
<td>No</td>
</tr>
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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

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<th>Selected</th>
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<tr>
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<td>Yes</td>
</tr>
<tr>
<td>The receipt printer is set as default</td>
<td>Yes</td>
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Under this scenario, the routing slip prints without letting the user select the printer.

### Print Preview

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<td>The receipt printer is set as default</td>
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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 Control and Display 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:

- You check-in an issue.
- A barcode item is created if the control is configured to do so.
- A Print dialog box appears. The user selects a print for the spine label.
• Any routing slips associated with the control record print.
• 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:

• You check-in an issue.
• A barcode item is created if the control is configured to do so.
• A Preview Labels window appears. To print the label, click the printer icon or close the window.
• Any routing slips associated with the control record print.

• A confirmation on 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 D: Chronology Types

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<th>Chronology Type</th>
<th>Definitions</th>
<th>Example</th>
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Appendix E: Calendar Guides

Below are calendar guides for 2011-2019:
# 2011 Calendar

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Serial Control Exercises

This set of training exercises reinforces the skills you learned as you moved through your SirsiDynix Symphony Serial Control training. If you need help completing any of these tasks, refer to the appropriate section of this guide, where steps to perform the task are given.

Several of the following exercises are also located in the agenda for the Serials Control classes, for practice in a Hands-on Lab classes.

Exercise 1 – Creating a Serial Control record for a monthly publication

Create a serial control record for the monthly publication Astronomy. Create predictions using the issue you have in hand, which is SEP 2011, V. 39 No. 9.

Exercise 2 – Creating a Serial Control record for a bimonthly publication

Create a serial control record for the bimonthly publication Archaeology. Create predictions using the issue you have in hand, which is SEP/OCT 2011, V. 64 No. 5.

Exercise 3 – Creating a Serial Control record for a daily publication (no enumeration)

Create a serial control record for the daily publication The New York Times without labels. Create predictions using the issue you have in your hand, which is today’s date.

Exercise 4 – Creating a Serial Control record with multiple distribution (multi-library sites with centralized check-in only)

Create a serial control record for the monthly publication Popular Science with multi-library distributions. The Arrowood and Caffey libraries will each expect one issue. Create predictions using the issue you have in your hand, which is SEP 2011, V. 279 No. 3.
Exercise 5 – Creating a Serial Control for an online subscription

Create a serial control record for an online subscription, *U.S. News and World Report*. This periodical is available online only and, therefore, you will not create predictions.

Exercise 6 – Creating an irregular Serial Control record with daily frequency except Sat., Sun., and general legal holidays

Create a serial control record for *USA Today* which does not publish on Saturdays, Sundays, and general legal holidays. Remove the labels for the title. Create predictions starting with today’s date.

Exercise 7 – Creating an irregular Serial Control record for a periodical published during the academic year

Create a serial control record for *Appleseeds* which is published during the academic year (not published June-August). Create predictions using the issue you have in your hand, which is SEP 2011, V. 13 No. 9.

Exercise 8 – Editing predicted issues

Modify the next expected issue for the title *Astronomy*. The vendor has informed you that the issue will be two weeks late and you want to modify the date expected for that issue.

Exercise 9 – Editing MARC Holdings

Modify the MARC Holdings information for *USA Today*. Enter in a textual holding tag that the library only retains the past two weeks.

Exercise 10 – Adding a routing slip

Add a routing list for an in-house copy of the *Library Journal*. Add the following users to the list: ASER, AACQ, and ATECH.

Exercise 11 – Checking in predicted issues

Check in the next two expected issues of *Smithsonian*.

Exercise 12 – Checking in issues out of order

The September 12, 2011 issue of *Jet* (vol. 120, no. 11) arrived before the September 5, 2011 issue (vol. 120, no. 10). Check in the issue out of order.

Exercise 13 – Checking in combined issues

Two issues of the monthly publication *Esquire* have been combined. Combine the September/October issues upon check-in—September/October 2011 (vol. 156, no. 2/3).
Exercise 14 – Checking in unexpected issues

*Smithsonian* has published a special edition called “Documenting the Civil War.” Check-in this special edition. Assume that you cannot find any enumeration in the publication.

Exercise 15 – Checking in fewer than expected copies

You expect two issues of *Time*, but only one has arrived. Check in fewer copies than expected for the September 5, 2011 (vol. 178, no. 9) issue.

Exercise 16 – Removing received issues

A staff member has accidentally checked in the wrong issue of *Jet*. “Unreceive” the issue you just checked in (September 12, 2011) and remove the MARC Holdings and update the 599 tag in the MARC record to reflect the correct information.

Exercise 17 – Claiming an issue

The September 19, 2011 (vol. 120, no. 12) issue of *Jet* is damaged and cannot be put on the shelf. Create a claim record indicating the issue is damaged and do not check it in.

Exercise 18 – Adding a routing slip

Add a routing list for an in-house copy of the Library Journal. Add the following users to the list: ASER, AACQ, and ATECH. Check in the next expected issue to view the routing slip.

Exercise 19 – Checking in a duplicate issue

Check in a duplicate issue of a periodical that you receive. Enter the enumeration and indicate in the chronology that it is a duplicate.

Exercise 20 – Setting up properties for the Check In wizard

Modify the *Check In* wizard properties to allow staff to disallow serial control record modification, modify routing list information for received issues, and dictate what actions staff can take when checking in issues.

Exercise 21 – Setting up properties for the Create Control wizard

Modify the *Create Control* wizard properties to allow the system to suppress the Library for New Control window when creating serial control records (a useful option for single libraries or in decentralized multi-library systems where each library creates its own control record), set the display of recently arrived issues to two, and change the number of issues per browse screen to 20.
Exercise 22 – Setting up properties for the Modify Control wizard

Set the Modify Control wizard properties to allow staff to remove received issues, activate the helper that will allow staff to change the title associated with a serial control record and remove any unnecessary tabs from displaying.

Exercise 23 – Creating a Serial Control category

Create two new Serial Control Category 2 policies called “Education” and “Science” for future serial control statistical analysis.

Exercise 24 – Creating a Serial Control status

Create a new Serial Control Status called “OLDTITLE” for keeping track of serial titles that change.

Exercise 25 – Creating a holiday

For those in the U.S., create a Holiday policy for Martin Luther King Jr. Day which is observed on the third Monday of January each year.

For those in Canada, create a Holiday policy for Canada Day which is July 1st.

Exercise 26 – Creating claim records

Run the Prediction as Late report to create claims for late issues.

Exercise 27 – Sending claim notices to vendors

Setup the Serial Claim Notices report template, run it immediately to view the results, and then schedule it to run automatically every Thursday at 2 pm.

Exercise 28 – Printing a list of Serial Control records not linked to vendors

Retrieve a list of serial control records that are not attached to a vendor record. You would like to begin sending claims to your vendors, but you realize that some of your Serial Control records may not be attached to vendor records.

Exercise 29 – Printing a list of Serial Control records with no predictions

Retrieve a list of serial control records that have no predicted issues to receive by running the Serial Controls without Predictions report.
The following are additional exercises that are not included in the Hands-on Lab agendas:

Exercise 30 – Creating a Serial Control record for a weekly publication

Create a serial control record for a weekly periodical that you receive. Create predictions using the issue you have in your hand.

Exercise 31 – Creating a Serial Control record for a quarterly publication

Create a serial control record for a quarterly periodical that you receive. Create predictions using the issue you have in your hand.

Exercise 32 – Creating a Serial Control record for an annual publication

Create a serial control record for an annual periodical that you receive. Create predictions using the issue you have in your hand.

Exercise 33 – Creating a Serial Control record for a bimonthly publication with check-in notes

Create a serial control record for a bimonthly periodical that you receive and include check-in notes in the control record. Create predictions using the issue you have in your hand.

Exercise 34 – Creating a Serial Control record for monthly publication with combined issues

Create a serial control record for a monthly periodical that you receive with combined issues. For example, the periodical may publish monthly except it combines Sep/Oct and Apr/May. Create predictions using the issue you have in hand.

Exercise 35 – Creating a Serial Control record for monthly publication with a volume and numbering scheme but no cover dates

Create a serial control record for a monthly publication that you receive that has a numbering scheme but no cover dates. Create predictions using the issue you have in your hand.
Exercise 36 – Creating a Serial Control record for a monthly publication using a custom chronology

Create a serial control record for a monthly publication that you receive that uses a custom chronology. For example, a periodical may be monthly, but two times a year a mid-month issue is also published. Create predictions using the issue you have in your hand.

Exercise 37 – Creating a Serial Control record for an irregular publication

Create a serial control record for an irregular publication that you receive with no discernable pattern concerning number of issues to be expected in a year or the way in which the volume and issue numbers are incrementing. Because this is an irregular publication, no predictions will be created.

Exercise 38 – Creating special instructions for an expected issue

Add a check in note for the next expected issue of a periodical you receive. Indicate special instructions just for that one issue.

Exercise 39 – Change a publication pattern

Modify an existing serial control record and change its publication pattern. For example, change a Monthly periodical to a Bimonthly publication.
Serial Control Exercises: Answers

Exercise 1 – Creating a Serial Control record for a monthly publication

1. Within the Common Tasks group of wizards, click the Create Control wizard.

2. Search for the title.

3. Click OK through the Library For New Serial Control window.

4. If the Patterns Template window appears, select the appropriate pattern template consistent with the subscription (MONTHLY).

5. In the Basic tab, choose LCPER as the class scheme. (Some libraries may see and use DEWEYPER.)

6. In the Patterns tab, verify the Enumeration Pattern.

7. Verify that the Chronology type is MONTH.

8. Verify the values in the Publication Patterns area.

9. Make any necessary changes in the OPAC Display tab.

10. In the Subscription tab, verify that the value of copies to receive is 1 (one physical copy).

11. Verify the number of issues is 12 (12 monthly issues a year).

12. Enter a Fiscal cycle and Vendor ID to link for ordering/claring.

13. In the Distribution tab, make any necessary adjustments to the distribution information, such as copies to add to the catalog or update holdings.

14. Click Create Control.

15. In the Get Expected Issues Info screen, verify the number of predictions you want to preview. Predict a minimum of 13.

16. Enter the Enumeration of the first issue you want to predict.

17. Enter the Chronology of the first issue you want to predict.

18. Enter the Date First Predicted.
19. Enter the Date Expected.
20. Click **Generate Predictions**.
21. Review the predictions in the Prediction Records area. Do one of the following:
   - If predictions are satisfactory, click **Save Prediction**.
   - If changes are needed, click **Redo Prediction**, and make necessary changes.
Exercise 2 – Creating a Serial Control record for a bimonthly publication

1. Within the Common Tasks group of wizards, click the Create Control wizard.

2. Search for the title.

3. Click OK through the Library For New Serial Control window.

4. If the Patterns Template window appears, select the appropriate pattern template consistent with the subscription (BIMONTHLY).

5. In the Basic tab, choose LCPER as the class scheme. (Some libraries may see and use DEWEYPER.)

6. In the Patterns tab, verify the Enumeration Pattern.

7. Verify that the Chronology type is BIMONTH.

8. Verify the values in the Publication Patterns area.

9. Make any necessary changes in the OPAC Display tab.

10. In the Subscription tab, verify that the value of copies to receive is 1 (one physical copy).

11. Verify the number of issues is 6 (6 bimonthly issues a year).

12. Enter a Fiscal cycle and Vendor ID to link for ordering/claiming.

13. In the Distribution tab, make any necessary adjustments to the distribution information such as copies to add to the catalog or update holdings.

14. Click Create Control.

15. In the Get Expected Issues Info screen, verify the number of predictions you want to preview. Predict a minimum of 7.

16. Enter the Enumeration of the first issue you want to predict.

17. Enter the Chronology of the first issue you want to predict.

18. Enter the Date First Predicted.

19. Enter the Date Expected.
20. Click Generate Predictions.

21. Review the predictions in the Prediction Records area. Do one of the following:

- If predictions are satisfactory, click Save Prediction.
- If changes are needed, click Redo Prediction, and make necessary changes.
Exercise 3 – Creating a Serial Control record for a daily publication (no enumeration)

1. Within the Common Tasks group of wizards, click the Create Control wizard.
2. Search for the title.
3. Click OK through the Library For New Serial Control window.
4. If the Patterns Template window appears, select the appropriate pattern template consistent with the subscription (DAILY).
5. In the Basic tab, choose LCPER as the class scheme. (Some libraries may see and use DEWEYPER.)
6. In the Patterns tab, remove the check boxes for the labels in the Publication Patterns area.
7. Verify that the Chronology type is DATE.
8. Verify the values in the Publication Patterns area.
9. Make any necessary changes in the OPAC Display tab.
10. In the Subscription tab, verify that the value of copies to receive is 1 (one physical copy).
11. Verify the number of issues is 365 (365 issues a year).
12. Enter a Fiscal cycle and Vendor ID to link for ordering/claiming.
13. In the Distribution tab, make any necessary adjustments to the distribution information, such as copies to add to the catalog or update holdings.
14. Click Create Control.
15. In the Get Expected Issues Info screen, verify the number of predictions you want to preview. Predict a minimum of 366.
16. Enter the Enumeration of the first issue you want to predict.
17. Enter the Chronology of the first issue you want to predict.
18. Enter the Date First Predicted.
19. Enter the Date Expected.
20. Click **Generate Predictions**.

21. Review the predictions in the Prediction Records area. Do one of the following:

- If predictions are satisfactory, click **Save Prediction**.
- If changes are needed, click **Redo Prediction**, and make necessary changes.
Exercise 4 – Creating a Serial Control record with multiple distribution (multi-library sites with centralized check-in only)

1. Within the Common Tasks group of wizards, click the Create Control wizard.
2. Search for the title.
3. Click OK through the Library For New Serial Control window.
4. If the Patterns Template window appears, select the appropriate pattern template consistent with the subscription (MONTHLY).
5. In the Basic tab, choose LCPER as the class scheme. (Some libraries may see and use DEWEYPER.)
6. In the Patterns tab, verify the Enumeration Pattern.
7. Verify that the Chronology type is MONTH.
8. Verify the values in the Publication Patterns area.
9. Make any necessary changes in the OPAC Display tab.
10. In the Subscription tab, verify that the value of copies to receive is 2 (two physical copies).
11. Verify the number of issues is 12 (12 monthly issues a year).
12. Enter a Fiscal cycle and Vendor ID to link for ordering/claiming.
13. In the Distribution tab, make any necessary adjustments to the distribution information such as copies to add to the catalog or update holdings.
14. Click Create Control.
15. In the Get Expected Issues Info screen, verify the number of predictions you want to preview. Predict a minimum of 13.
16. Enter the Enumeration of the first issue you want to predict.
17. Enter the Chronology of the first issue you want to predict.
18. Enter the Date First Predicted.
19. Enter the Date Expected.
20. Click **Generate Predictions**.

21. Review the predictions in the Prediction Records area. Do one of the following:
   - If predictions are satisfactory, click **Save Prediction**.
   - If changes are needed, click **Redo Prediction**, and make necessary changes.

22. Once the record has been created, click the **Distribution** tab.

23. Click the **Create a Distribution** tool.

24. Select the CAFSERIAL holding code in the drop down list.

25. Verify that the number of copies expected is 1.

26. If necessary, change the Copies to add to catalog value.

27. Click **Create Distribution**.

28. If necessary, modify the other existing distribution by highlighting it and clicking the **Modify a Distribution** tool.

29. Click **Modify Control** to save your changes.
Exercise 5 – Creating a Serial Control for an online subscription

1. Within the Common Tasks group of wizards, click the Create Control wizard.

2. Search for the title.

3. Click OK through the Library For New Serial Control window.

4. If the Patterns Template window appears, select the appropriate pattern template consistent with the subscription (WEEKLY).

5. In the Patterns tab, uncheck the box next to Allow automatic prediction of issues.

6. Click the MARC Holdings tab.

7. Click the information under Location—Linked to.

8. Right-click on the last tag that appears and select Add Field After.

9. Enter 856 for the Tag.

10. In the Contents area, enter |u and the URL for the online subscription.

11. Click Save.

12. Click Close.

13. Click Create Control.

14. Click OK.
Exercise 6 – Creating an irregular Serial Control record with daily frequency except Sat., Sun., and general legal holidays

1. Within the Common Tasks group of wizards, click the Create Control wizard.

2. Search for the title.

3. Click OK through the Library For New Serial Control window.

4. If the Patterns Template window appears, select the appropriate pattern template consistent with the subscription (DAILY).

5. In the Basic tab, choose LCPER as the class scheme. (Some libraries may see and use DEWEYPER.)

6. In the Patterns tab, remove the check boxes for the labels in the Publication Patterns area.

7. Change the Limit to 255.

8. Click the Publication Cycle gadget.

9. Click the Omit Issue by helper.

10. Check the boxes next to Saturday and Sunday in the Day of Week tab.

11. Click the Holiday tab.

12. Click the box next to each holiday.

13. Click OK.

14. Click OK.

15. Make any necessary changes in the OPAC Display tab.

16. In the Subscription tab, verify that the value of copies to receive is 1 (one physical copy).

17. Change the number of issues to 255 (255 issues a year).

18. Enter a Fiscal cycle and Vendor ID to link for ordering/claiming.

19. In the Distribution tab, make any necessary adjustments to the distribution information such as copies to add to the catalog or update holdings.
20. Click **Create Control**.

21. In the Get Expected Issues Info screen, verify the number of predictions you want to preview. Predict a minimum of 256.

22. Enter the Chronology of the first issue you want to predict.

23. Enter the Date First Predicted.

24. Enter the Date Expected.

25. Click **Generate Predictions**.

26. Review the predictions in the Prediction Records area. Do one of the following:

   - If predictions are satisfactory, click **Save Prediction**.
   - If changes are needed, click **Redo Prediction**, and make necessary changes.
Exercise 7 – Creating an irregular Serial Control record for a periodical published during the academic year

1. Within the Common Tasks group of wizards, click the Create Control wizard.

2. Search for the title.

3. Click OK through the Library For New Serial Control window.

4. If the Patterns Template window appears, select the appropriate pattern template consistent with the subscription (MONTHLY).

5. In the Basic tab, choose LCPER as the class scheme. (Some libraries may see and use DEWEYPER.)

6. In the Patterns tab, change the Limit to 9.

7. Verify that the Chronology type is MONTH.

8. Click the Publication Cycle gadget.

9. Click the Omit Issue by helper.

10. Check the boxes next to June, July and August in the Date tab.

11. Click OK.

12. Click OK.

13. Make any necessary changes in the OPAC Display tab.

14. In the Subscription tab, verify that the value of copies to receive is 1 (one physical copy).

15. Change the number of issues to 9 (9 issues a year).

16. Enter a Fiscal cycle and Vendor ID to link for ordering/claiming.

17. In the Distribution tab, make any necessary adjustments to the distribution information, such as copies to add to the catalog or update holdings.

18. Click Create Control.

19. In the Get Expected Issues Info screen, verify the number of predictions you want to preview. Predict a minimum of 10.
20. Enter the Chronology of the first issue you want to predict.

21. Enter the Date First Predicted.

22. Enter the Date Expected.

23. Click **Generate Predictions**.

24. Review the predictions in the Prediction Records area. Do one of the following:

   • If predictions are satisfactory, click **Save Prediction**.
   • If changes are needed, click **Redo Prediction**, and make necessary changes.
Exercise 8 – Editing predicted issues

1. Within the Common Tasks group of wizards, click the *Modify Control* wizard.
2. Search for the title.
3. Click the *Expected* tab.
4. Click the *Modify an Issue* tool.
5. Click the *Date Expected* gadget.
6. Change the date to be two weeks later and click *OK*.
7. Click *Modify Issue*.
8. Click *Close* to exit the wizard.
Exercise 9 – Editing MARC holdings

1. Within the Common Tasks group of wizards, click the Modify Control wizard.

2. Search for the title.

3. Click the MARC Holdings tab.

4. Click the Location — Linked to information.

5. Right-click on the last tag that appears and select Add Field After.

6. Enter 866 for the Tag.

7. In the Contents area, enter the information that you want to display about the library’s holdings. For example, enter “Library retains current 2 weeks.”

8. Click Save.

9. Click Close.

10. Click Close to exit the wizard.
Exercise 10 – Adding a routing slip

1. Within the Common Tasks group of wizards, click the *Modify Control* wizard.

2. Search for the title.

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. Click the *User ID* gadget.

8. Search for the first user.

9. When the user ID is highlighted, click **OK**.

10. Enter the rank for the routing. (1=highest)

11. Repeat steps 4-8 until all users have been entered for the list.

12. When complete, click **Close** to exit the wizard.
Exercise 11 – Checking in predicted issues

1. Within the Common Tasks group of wizards, click the Check In wizard.

2. Search for the title.

3. Click Check In Now.

4. Click Next Issue.

5. Click Check In Now.

6. Click Next Issue.

7. Click Check In Now.
Exercise 12 – Checking in issues out of order

1. Within the Common Tasks group of wizards, click the Check In wizard.

2. Search for the title.

3. Click Different Issue.

4. Highlight the issue you want to check in.

5. Click Selected Issue.
Exercise 13 – Checking in combined issues

1. Within the Common Tasks group of wizards, click the Check In wizard.
2. Search for the title.
3. Click Different Issue.
4. Click Combine Issues.
5. Select the boxes next to the two issues to combine.
6. Click Combine Issues.
Exercise 14 – Checking in unexpected issues

1. Within the Common Tasks group of wizards, click the Check In wizard.
2. Search for the title.
3. Click Different Issue.
4. Click Special Issue.
5. Click the Special option.
6. Verify that the Basic option is selected.
7. Enter the enumeration about the issue being received. (You can enter a numbering scheme or indicate that it is a special edition.)
8. Enter the chronology. You can enter here, “Documenting the Civil War.”
9. Enter a receipt comment, if necessary.
10. Click Check In.
Exercise 15 – Checking in fewer than expected copies

1. Within the Common Tasks group of wizards, click the Check In wizard.
2. Search for the title.
3. Click Different Copies.
4. Change the number received to 1.
5. If necessary, enter a receipt comment.
6. Click Check In Copies Now.
7. Click OK.
Exercise 16 – Removing received issues

1. Within the Common Tasks group of wizards, click the *Modify Control* wizard.

2. Search for the title.

3. Click *Received* tab.

4. Click the *Unreceive Issue(s)* tool.

5. Select the issue to unreceive.

6. Click *Unreceive Issue(s).*

7. Click *OK.*

8. Click the *MARC Holdings* tab.

9. Click the Location – Linked to information.

10. Right-click on the last 863 tag that appears and select *Delete Field.*

11. Click *Save.*

12. Click *Close.*

13. Click the *Modify Bibliographic Description* helper. (If the helper is not available, this can be done in the *Modify Title* wizard.)

14. Delete the enumeration, chronology, and date that correspond with the issue you have just unreceived.

15. Click *Save.*

16. Click *Close.*
Exercise 17 – Claiming an issue

1. Within the Common Tasks group of wizards, click the Modify Control wizard.
2. Search for the title.
3. Click Claimed tab.
4. Click the Create a Claim tool.
5. Highlight the issues you want to claim.
6. Click Create Claim.
7. Using the drop down, select a Claim Reason.
8. If necessary, enter any claim or response comments.
9. Click Modify Issue.
10. Click Close.
Exercise 18 – Adding a routing slip

1. Within the Common Tasks group of wizards, click the *Modify Control* wizard.

2. Search for the title.

3. Click **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. Click the *User ID* gadget.

8. Search for the first user.

9. When the user ID is highlighted, click **OK**.

10. Enter the rank for the routing. (1=highest)

11. Repeat steps 4-8 until all users have been entered for the list.

12. When complete, click **Close** to exit the wizard.
Exercise 19 – Checking in a duplicate issue

1. Within the Common Tasks group of wizards, click the Check In wizard.
2. Search for the title.
3. Click Different Issue.
4. Click Special Issue.
5. Verify that the According to Pattern option is selected.
6. Enter the enumeration.
7. Enter the chronology followed by DUP to represent that this is a duplicate issue. OCT 2011 DUP.
8. Click Check In.
Exercise 20 – Setting up properties for the Check In wizard

9. In the Serial Control toolbar, right-click the Check In wizard.

10. Click Properties.

11. In the Behavior tab, click the Print Routing Lists For Received Issues button.

12. Click the Receipt Header gadget.

13. Enter the string “Routing List.”

14. Click Add.

15. Click Save.

16. Click OK.

17. Under Other Preferences, unselect the check box next to Modify Serial Control.

18. Under At End of Wizard, unselect the Next Issue check box.

19. Click OK.
Exercise 21 – Setting up properties for the Create Control wizard

1. In the Serial Control toolbar, right-click the *Create Control* wizard.

2. Click **Properties**.

3. In the **Behavior** tab, unselect the Prompt for Library When Creating a Serial Control Record check box.

4. Click the **Defaults** tab.

5. Change the number of most recently arrived issues as a note to the value of 2.

6. Change the Number of Issues per Browse Screen to 20.

7. Click **OK**.
Exercise 22 – Setting up properties for the Modify Control wizard

1. In the Serial Control toolbar, right-click the Modify Control wizard.
2. Click Properties.
3. In the Behavior tab, select the check box next to Delete Received Issues.
4. Click the Defaults tab and unselect the check box next to Show Binding Folder.
5. Click the Helpers tab.
6. Select the Change Title Link check box.
7. Click OK.
Exercise 23 – Creating a Serial Control category

1. In the Configuration toolbar under the Serial Control Configuration group of wizards, click the Serial Control Category 2 wizard.

2. Click Create.

3. Enter the new policy name “EDUCATION.”

4. If you wish, enter a description.

5. Click Save.

6. Click Create.

7. Enter the new policy name “SCIENCE.”

8. If you wish, enter a description.

9. Click Save.

10. Click Close.
Exercise 24 – Creating a Serial Control status

1. In the Configuration toolbar under the Serial Control Configuration group of wizards, click the Serial Control Status wizard.

2. Click Create.

3. Enter the new policy name “OLDTITLE.”

4. If you wish, enter a description.

5. Click Save.

6. Click Close.
Exercise 25 – Creating a holiday (U.S. customers creating MLK Day)

1. In the Configuration toolbar under the Serial Control Configuration group of wizards, click the Holiday wizard.

2. Click Create.

3. Enter the new policy name “MLK-DAY.”

4. If you wish, enter a description.

5. Click the Date gadget.

6. For Martin Luther King Jr. Day, select Weekday of Month helper.

7. Verify that the month is set to January.

8. Verify that the From First check box is selected and click on the third box down under Monday in the Calendar.

9. Click OK.

10. Click Save.

11. Click Close.
Exercise 25 – Creating a holiday (Canadian customers creating Canada Day)

1. In the Configuration toolbar under the Serial Control Configuration group of wizards, click the Holiday wizard.
2. Click Create.
3. Enter the new policy name “CANADA-DAY.”
4. If you wish, enter a description.
5. Click the Date gadget.
6. Select the July button.
7. Click the 1 button.
8. Click OK.
9. Click Save.
10. Click Close.
Exercise 26 – Creating claim records

1. In the Reports toolbar, click the Schedule New Reports wizard.

2. Click the Serial group of reports.

3. Double-click the Prediction as Late report or highlight it and click Setup & Schedule.

4. Click Run Now.

5. Click Display Finished Reports.

6. Double-click the report you just ran or highlight it and click View.

7. Click OK.

8. Use the X to close the report when you have finished viewing the log.
Exercise 27 – Sending claim notices to vendors

1. In the Reports toolbar, click the Schedule New Reports wizard.
2. Click the Serial group of reports.
3. Double-click the Serial Claim Notices report or highlight it and click Setup & Schedule.
4. Click Save As Template.
5. Click OK.
6. Click the Templates tab of reports.
7. Double-click the Serial Claim Notices report or highlight it and click Setup & Schedule.
8. Click Run Now.
9. Click Display Finished Reports.
10. Double-click the report you just ran or highlight it and click View.
11. Click OK.
12. Use the X to close the report when you have finished viewing the log.
13. Click the Schedule New Reports wizard again.
14. Double-click the Serial Claim Notices report or highlight it and click Setup & Schedule.
15. Click Schedule.
16. Select the Weekly schedule option.
17. Click the box next to Thursday and remove any other check mark in the Days of Week list.
18. In the calendar, click next Thursday and change the time to 2:00 PM.
19. Click Schedule.
20. Click Close.
Exercise 28 – Printing a list of Serial Control records not linked to vendors

1. In the Reports toolbar, click the Schedule New Reports wizard.
2. Click the Serial group of reports.
3. Double-click the Serial Controls not Linked to Vendors report or highlight it and click Setup & Schedule.
4. Click Run Now.
5. Click Display Finished Reports.
6. Double-click the report you just ran or highlight it and click View.
7. Click OK.
8. Use the X to close the report when you have finished viewing the log.
Exercise 29 – Printing a list of Serial Control records with no predictions

1. In the Reports toolbar, click the Schedule New Reports wizard.
2. Click the Serial group of reports.
3. Double-click the Serial Controls without Predictions report or highlight it and click Setup & Schedule.
4. Click Run Now.
5. Click Display Finished Reports.
6. Double-click the report you just ran or highlight it and click View.
7. Click OK.
8. Use the X to close the report when you have finished viewing the log.
Exercise 30 – Creating a Serial Control record for a weekly publication

1. Within the Common Tasks group of wizards, click the Create Control wizard.

2. Search for the title.

3. Click OK through the Library For New Serial Control window.

4. If the Patterns Template window appears, select the appropriate pattern template consistent with the subscription (WEEKLY).

5. In the Basic tab, choose LCPER as the class scheme. (Some libraries may see and use DEWEYPER.)

6. In the Patterns tab, verify the Enumeration Pattern.

7. Verify that the Chronology type is DATE.

8. Verify the values in the Publication Patterns area.

9. Make any necessary changes in the OPAC Display tab.

10. In the Subscription tab, verify that the value of copies to receive is 1 (one physical copy).

11. Verify the number of issues is 52 (52 monthly issues a year).

12. Enter a Fiscal cycle and Vendor ID to link for ordering/claiming.

13. In the Distribution tab, make any necessary adjustments to the distribution information, such as copies to add to the catalog or update holdings.

14. Click Create Control.

15. In the Get Expected Issues Info screen, verify the number of predictions you want to preview.

16. Enter the Enumeration of the first issue you want to predict.

17. Enter the Chronology of the first issue you want to predict.

18. Enter the Date First Predicted.

19. Enter the Date Expected.
20. Click **Generate Predictions**.

21. Review the predictions in the Prediction Records area. Do one of the following:

- If predictions are satisfactory, click **Save Prediction**.
- If changes are needed, click **Redo Prediction**, and make necessary changes.
Exercise 31 – Creating a Serial Control record for a quarterly publication

1. Within the Common Tasks group of wizards, click the Create Control wizard.

2. Search for the title.

3. Click OK through the Library For New Serial Control window.

4. If the Patterns Template window appears, select the appropriate pattern template consistent with the subscription (QUARTERLY).

5. In the Basic tab, choose LCPER as the class scheme. (Some libraries may see and use DEWEYPER.)

6. In the Patterns tab, verify the Enumeration Pattern.

7. Verify that the Chronology type is SEASON, SEASON2, or SEASON3, depending on the first element in cycle. (For example, if WIN is the first element in the cycle, then the Chronology type is SEASON.)

8. Verify the values in the Publication Patterns area.

9. Make any necessary changes in the OPAC Display tab.

10. In the Subscription tab, verify that the value of copies to receive is 1 (one physical copy).

11. Verify the number of issues is 4 (4 monthly issues a year).

12. Enter a Fiscal cycle and Vendor ID to link for ordering/claiming.

13. In the Distribution tab, make any necessary adjustments to the distribution information, such as copies to add to the catalog or update holdings.

14. Click Create Control.

15. In the Get Expected Issues Info screen, verify the number of predictions you want to preview.

16. Enter the Enumeration of the first issue you want to predict.

17. Enter the Chronology of the first issue you want to predict.

18. Enter the Date First Predicted.
19. Enter the Date Expected.

20. Click **Generate Predictions**.

21. Review the predictions in the Prediction Records area. Do one of the following:

- If predictions are satisfactory, click **Save Prediction**.
- If changes are needed, click **Redo Prediction**, and make necessary changes.
Exercise 32 – Creating a Serial Control record for an annual publication

1. Within the Common Tasks group of wizards, click the Create Control wizard.

2. Search for the title.

3. Click OK through the Library For New Serial Control window.

4. If the Patterns Template window appears, select the appropriate pattern template consistent with the subscription (ANNUAL).

5. In the Basic tab, choose LCPER as the class scheme. (Some libraries may see and use DEWEYPER.)

6. In the Patterns tab, verify the Enumeration Pattern.

7. Verify that the Chronology type is YEAR.

8. Verify the values in the Publication Patterns area.

9. Make any necessary changes in the OPAC Display tab.

10. In the Subscription tab, verify that the value of copies to receive is 1 (one physical copy).

11. Verify the number of issues is 1 (1 yearly issues a year).

12. Enter a Fiscal cycle and Vendor ID to link for ordering/claiming.

13. In the Distribution tab, make any necessary adjustments to the distribution information such as copies to add to the catalog or update holdings.

14. Click Create Control.

15. In the Get Expected Issues Info screen, verify the number of predictions you want to preview.

16. Enter the Enumeration of the first issue you want to predict.

17. Enter the Chronology of the first issue you want to predict.

18. Enter the Date First Predicted.

19. Enter the Date Expected.
20. Click **Generate Predictions**.

21. Review the predictions in the Prediction Records area. Do one of the following:

- If predictions are satisfactory, click **Save Prediction**.
- If changes are needed, click **Redo Prediction**, and make necessary changes.

If the annual publication is difficult to predict, you do not have to create predictions. You have the option to create the check in without predictions. You will enter the enumeration and chronology during check in.
Exercise 33 – Creating a Serial Control record for a bimonthly publication with check in notes

1. Within the Common Tasks group of wizards, click the Create Control wizard.

2. Search for the title.

3. Click OK through the Library For New Serial Control window.

4. If the Patterns Template window appears, select the appropriate pattern template consistent with the subscription (BIMONTHLY).

5. In the Basic tab, choose LCPER as the class scheme. (Some libraries may see and use DEWEYPER.)

6. In the Patterns tab, verify the Enumeration Pattern.

7. Change the Chronology type to BIMONTH or BIMONTH2 depending on the publication.

8. Verify the values in the Publication Patterns area.

9. Make any necessary changes in the OPAC Display tab.

10. In the Subscription tab, verify that the value of copies to receive is 1 (one physical copy).

11. Verify the number of issues is 6 (6 bimonthly issues a year).

12. Enter a Fiscal cycle and Vendor ID to link for ordering/claiming.

13. In the Distribution tab, make any necessary adjustments to the distribution information such as copies to add to the catalog or update holdings.

14. Click the Extended Info tab and enter the check-in note that you want displayed upon check in, such as “Watch for special issues.”

15. Click Create Control.

16. In the Get Expected Issues Info screen, verify the number of predictions you want to preview. Predict a minimum of 7.

17. Enter the Enumeration of the first issue you want to predict.

18. Enter the Chronology of the first issue you want to predict.
19. Enter the Date First Predicted.

20. Enter the Date Expected.

21. Click **Generate Predictions**.

22. Review the predictions in the Prediction Records area. Do one of the following:

- If predictions are satisfactory, click **Save Prediction**.
- If changes are needed, click **Redo Prediction**, and make necessary changes.

If you want the predicted issues to display as Sep/Oct and Apr/May, go to the **Expected** tab and modify those issues individually.
Exercise 34 – Creating a Serial Control record for monthly publication with combined issues

1. Within the Common Tasks group of wizards, click the Create Control wizard.

2. Search for the title.

3. Click OK through the Library For New Serial Control window.

4. If the Patterns Template window appears, select the appropriate pattern template consistent with the subscription (MONTHLY).

5. In the Basic tab, choose LCPER as the class scheme. (Some libraries may see and use DEWEYPER.)

6. In the Patterns tab, change the limit to reflect the number of issues received in a year’s subscription. For example, if the publication combines Sep/Oct and Apr/May, the limit would be 10.

7. Verify that the Chronology type is MONTHLY.

8. Click the Publication Cycle gadget.

9. Click the Omit Issue by helper.

10. Check the boxes next to the months you want to omit. In this example, you would choose Oct and May in the Date tab.

11. Make any necessary changes in the OPAC Display tab.

12. In the Subscription tab, verify that the value of copies to receive is 1 (one physical copy).

13. Verify the number of issues is the number of issues within a year’s subscription. For example, if the publication combines Sep/Oct and Apr/May, the number of issues would be 10.

14. Enter a Fiscal cycle and Vendor ID to link for ordering/claiming.

15. In the Distribution tab, make any necessary adjustments to the distribution information, such as copies to add to the catalog or update holdings.

16. Click Create Control.
17. In the Get Expected Issues Info screen, verify the number of predictions you want to preview. Predict a minimum of 13.

18. Enter the Enumeration of the first issue you want to predict.

19. Enter the Chronology of the first issue you want to predict.

20. Enter the Date First Predicted.

21. Enter the Date Expected.

22. Click **Generate Predictions**.

23. Review the predictions in the Prediction Records area. Do one of the following:
   - If predictions are satisfactory, click **Save Prediction**.
   - If changes are needed, click **Redo Prediction**, and make necessary changes.
Exercise 35 – Creating a Serial Control record for monthly publication with a volume and numbering scheme but no cover dates

1. Within the Common Tasks group of wizards, click the Create Control wizard.

2. Search for the title.

3. Click OK through the Library For New Serial Control window.

4. If the Patterns Template window appears, select the appropriate pattern template consistent with the subscription (MONTHLY).

5. In the Basic tab, choose LCPER as the class scheme. (Some libraries may see and use DEWEYPER.)

6. In the Patterns tab, verify the Enumeration Pattern.

7. Change the Chronology type to NUMERATION.

8. Verify the values in the Publication Patterns area.

9. Make any necessary changes in the OPAC Display tab.

10. In the Subscription tab, verify that the value of copies to receive is 1 (one physical copy).

11. Verify the number of issues is 12 (12 monthly issues a year).

12. Enter a Fiscal cycle and Vendor ID to link for ordering/claiming.

13. In the Distribution tab, make any necessary adjustments to the distribution information, such as copies to add to the catalog or update holdings.

14. Click Create Control.

15. In the Get Expected Issues Info screen, verify the number of predictions you want to preview.

16. Enter the Enumeration of the first issue you want to predict.

17. Enter the Chronology of the first issue you want to predict.

18. Enter the Date First Predicted.

19. Enter the Date Expected.
20. Click **Generate Predictions**.

21. Review the predictions in the Prediction Records area. Do one of the following:

- If predictions are satisfactory, click **Save Prediction**.
- If changes are needed, click **Redo Prediction**, and make necessary changes.
Exercise 36 – Creating a Serial Control record for a monthly publication using a custom chronology

1. Within the Common Tasks group of wizards, click the Create Control wizard.

2. Search for the title.

3. Click OK through the Library For New Serial Control window.

4. If the Patterns Template window appears, select the appropriate pattern template consistent with the subscription (MONTHLY).

5. In the Basic tab, choose LCPER as the class scheme. (Some libraries may see and use DEWEYPER.)

6. In the Patterns tab, change the Limit to reflect the number of issues received in a year’s subscription.

7. Change the Chronology type to CUSTOM.

8. Enter the Custom List. For example, enter JAN, FEB, MAR, MID-MAR, APR, MAY, JUN, JUL, AUG, SEP, OCT, MID-OCT, NOV, DEC.

9. Verify the values in the Publication Patterns area. (You may need to make omissions depending on the number of issues you expect in a yearly subscription.)

10. Make any necessary changes in the OPAC Display tab.

11. In the Subscription tab, verify that the value of copies to receive is 1 (one physical copy).

12. Verify the number of issues is correct. In the example given above, the number of issues to expect would be 14.

13. Enter a Fiscal cycle and Vendor ID to link for ordering/claiming.

14. In the Distribution tab, make any necessary adjustments to the distribution information, such as copies to add to the catalog or update holdings.

15. Click Create Control.

16. In the Get Expected Issues Info screen, verify the number of predictions you want to preview.

17. Enter the Enumeration of the first issue you want to predict.
18. Enter the Chronology of the first issue you want to predict.

19. Enter the Date First Predicted.

20. Enter the Date Expected.

21. Click **Generate Predictions**.

22. Review the predictions in the Prediction Records area. Do one of the following:

   - If predictions are satisfactory, click **Save Prediction**.
   - If changes are needed, click **Redo Prediction**, and make necessary changes.
Exercise 37 – Creating a Serial Control record for an irregular publication

1. Within the Common Tasks group of wizards, click the Create Control wizard.

2. Search for the title.

3. Click OK through the Library For New Serial Control window.

4. If the Patterns Template window appears, select the appropriate pattern template consistent with the subscription. It is possible to bypass this window by clicking the Cancel button.

5. In the Basic tab, choose LCPER as the class scheme. (Some libraries may see and use DEWEYPER.)

6. In the Patterns tab, select the first two Use check boxes and add the V. and NO. labels using the gadget.

7. The Limit box will be left blank.

8. Verify that the Chronology type is MONTH.

9. Leave the Publication Cycle field in the Publication Pattern area blank.


11. Make any necessary changes in the OPAC Display tab.

12. In the Subscription tab, verify that the value of copies to receive is 1 (one physical copy).

13. Leave the number of issues blank.

14. In the Distribution tab, make any necessary adjustments to the distribution information such as copies to add to the catalog or update holdings.

15. Click Create Control.

16. Click OK.
Exercise 38 – Creating special instructions for an expected issue

1. Within the Common Tasks group of wizards, click the Modify Control wizard.

2. Search for the title.

3. Click the Expected tab.

4. Click the Modify an Issue tool.

5. Enter a comment in the Comment field.

6. Click Modify Issue.
Exercise 39 – Change a publication pattern

1. Within the Common Tasks group of wizards, click the Modify Control wizard.

2. Search for the title.

3. Click the Expected tab.

4. Click the Delete Predictions tool.

5. Select the Remove All Predictions check box.

6. Click Delete Predictions.

7. Click OK.

8. If necessary, repeat steps 4-7 to remove all predictions.

9. Click the Patterns tab.

10. Click the Replace Patterns helper.

11. Select the new pattern.

12. Click Replace Patterns.

13. Click the Subscription tab.

14. Change the number of issues.

15. Click the Expected tab.

16. Click the Generate Predictions helper.

17. In the Get Expected Issues Info screen, verify the number of predictions you want to preview.

18. Enter the Enumeration of the issue.

19. Enter the Chronology of the issue.

20. Enter the Date First Predicted.

21. Enter the Date Expected.

22. Click Generate Predictions.
23. Review the predictions in the Prediction Records area. Do one of the following:

- If predictions are satisfactory, click **Save Prediction**.
- If changes are needed, click **Redo Prediction**, and make necessary changes.