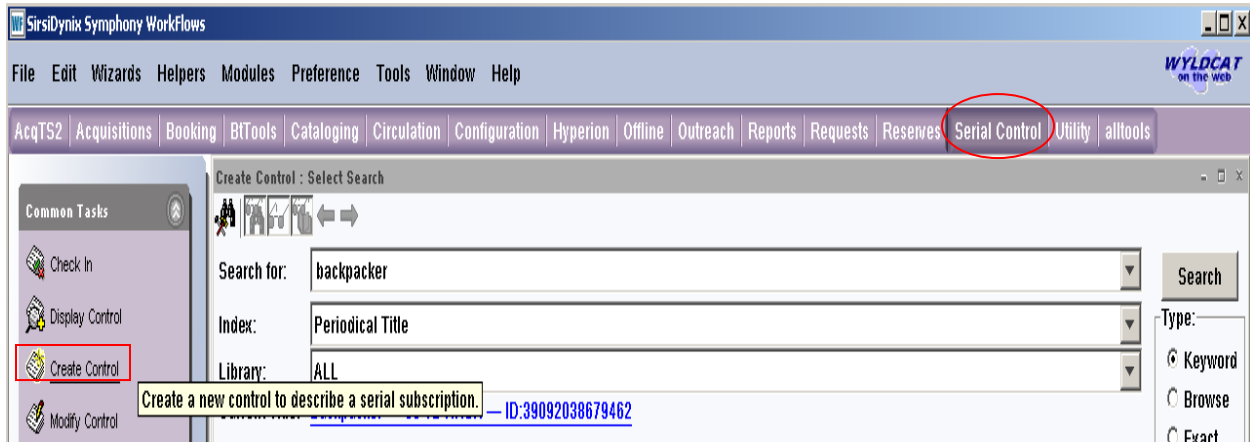


WYLD TECHNOTES: JavaClient / Serials

Create a Serials Control Record in Java Workflows

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

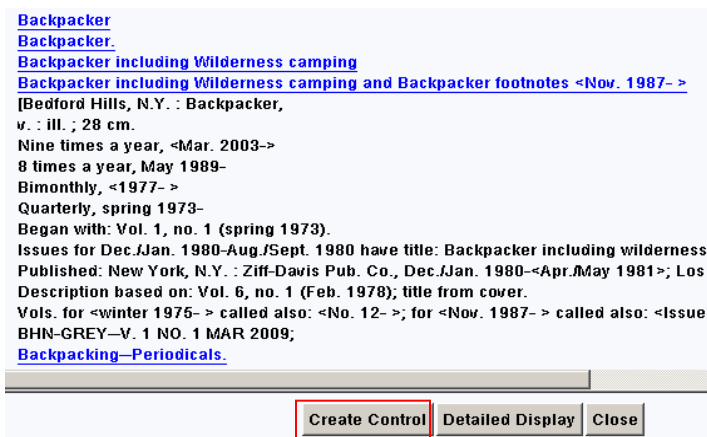
****Right click to confirm the correct Properties settings the first time you use this wizard.****



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

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

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



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

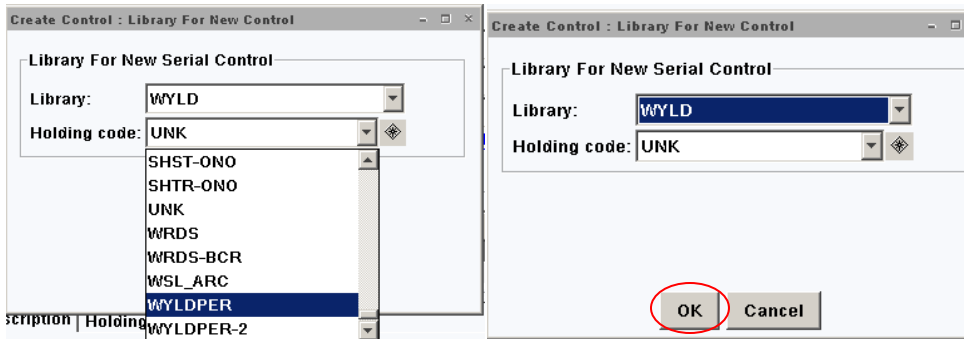
6. Click on Create New Control option.



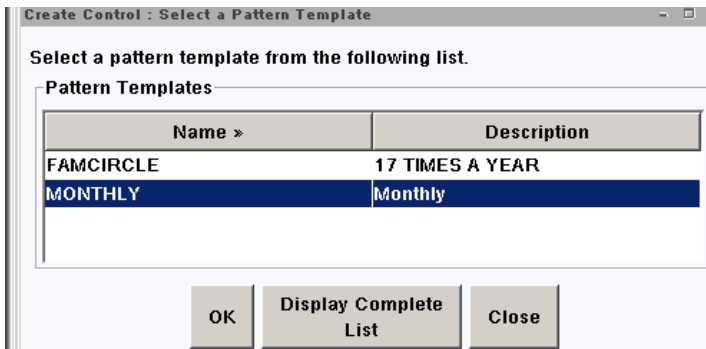
If no other serials control records exist on this bibliographic record, this options window will not display.

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

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



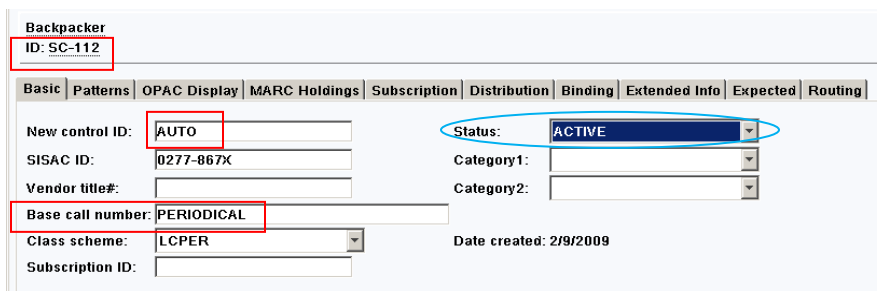
9. Select Pattern for frequency of publication if this selection option appears. Not all titles require this step.



10. Default frequency from Bibliographic record will display.

Click OK button to retrieve Control Record template.

Template for New Serial Control Record: Basic Tab



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

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

13. Add Base Call Number. Use PERIODICAL or MAGAZINE. A real call number can be used instead or an abbreviated version of either PER, MAG, or an abbreviation of the periodical title itself. Using an abbreviation is

particularly helpful if both enumeration and chronology are selected to display in the OPAC Display tab. If the base call number is too long, not all of the combined enumeration/chronology will display.

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

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

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

16. Move across to next Tab: Patterns.

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

Template for New Serial Control Record: Patterns Tab

Backpacker
ID: SC-112

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

Enumeration pattern

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

Chronology pattern

Chronology type: MONTH

Publication pattern

Allow automatic prediction of issues

Publication cycle: 1:M:1:D!

Days to wait before claiming: 15

Days before subsequent claim: 90

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

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

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

****Note:** The default Chronology comes from the frequency code in the fixed field of the bibliographic record. If the default Chronology displayed here does not match the frequency of the publication in hand, then the bibliographic record frequency is incorrect. If the publication frequency of the serial changed after the creation of the bibliographic record in WYLD, the bibliographic record won't reflect that change. This means the bibliographic record needs to be overlaid with an updated OCLC record or corrected manually in WYLD. This mismatch of frequency and Chronology type can result in the generation of error messages when issues are

predicted. *When setting the properties on the Create a Serial Control wizard be sure the settings of the Display Bibliographic Description Helper include the option to display the fixed field.

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

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

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

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

Changes necessary for CUSTOM Chronology Type

Backpacker
ID: SC-117

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

Enumeration pattern

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

Chronology pattern

Chronology type: CUSTOM

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

Publication pattern

Allow automatic prediction of issues

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

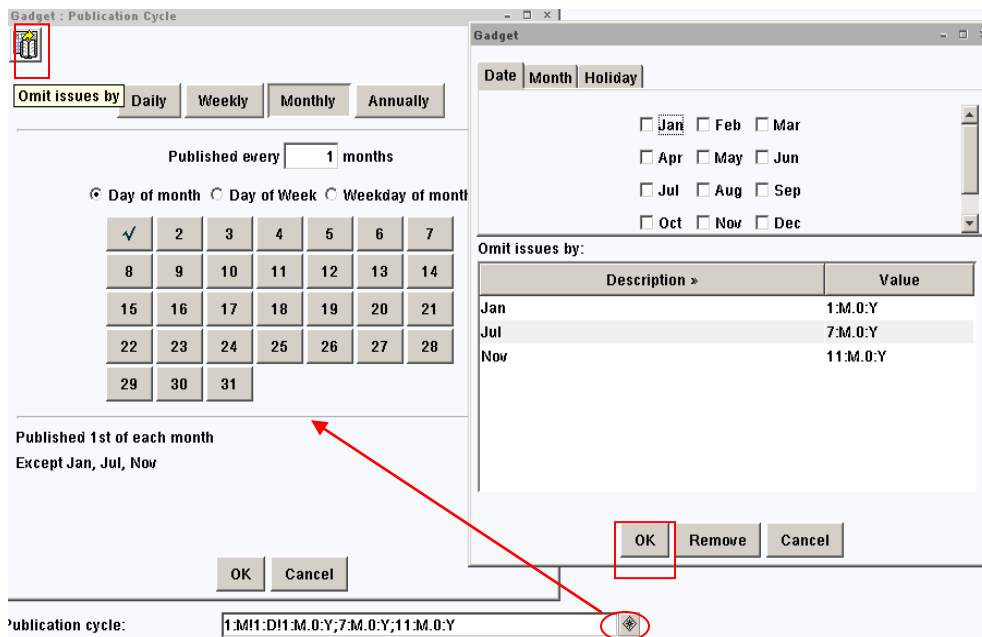
Days to wait before claiming: 15

Days before subsequent claim: 90

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

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

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



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

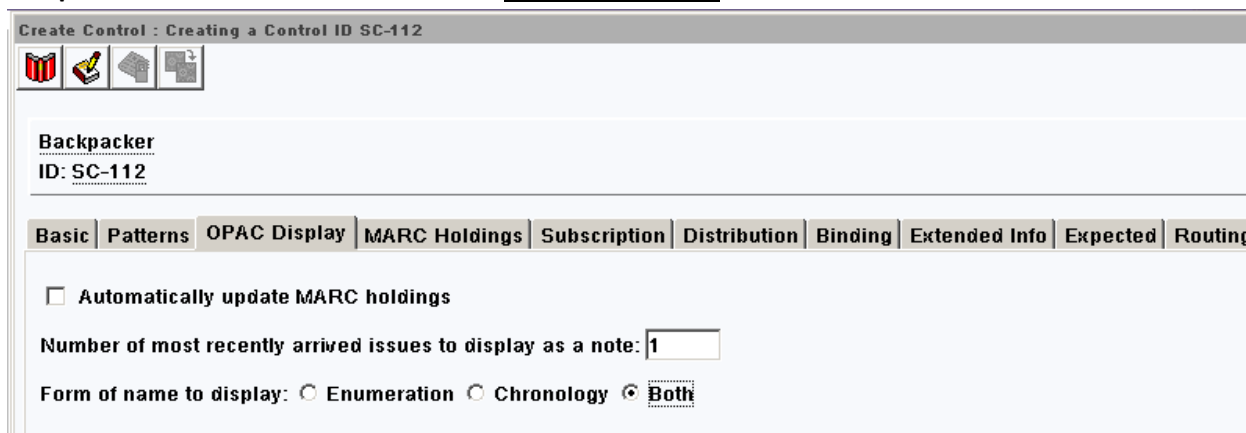
26. Click on Omit Issues Helper in upper left corner of Calendar window to display another new window with options for selecting omissions. This second window is displayed above on the right.

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

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

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

Template for New Serial Control Record: OPAC Display Tab



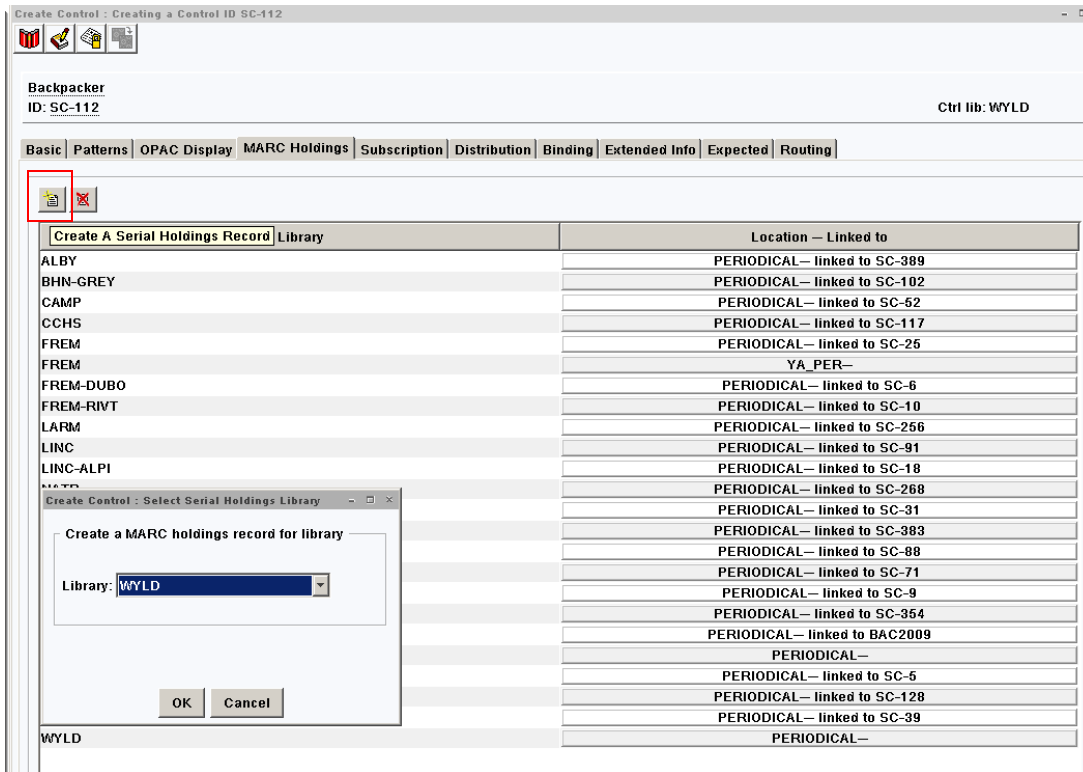
30. Automatically Update MARC holdings: This should *never* be checked.

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

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

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

Template for New Serial Control Record: MARC Holdings Tab



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

34. Click OK button after library has been selected.

Default MARC Holdings Template

Create Control : Creating a Control ID SC-112

Backpacker
ID: SC-112

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

Create Control : Create a MARC Holdings record

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

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

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

Completed MARC Holdings Record

Create Control : Creating a Control ID SC-112

Backpacker
ID: SC-112

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

Create Control : Create a MARC Holdings record

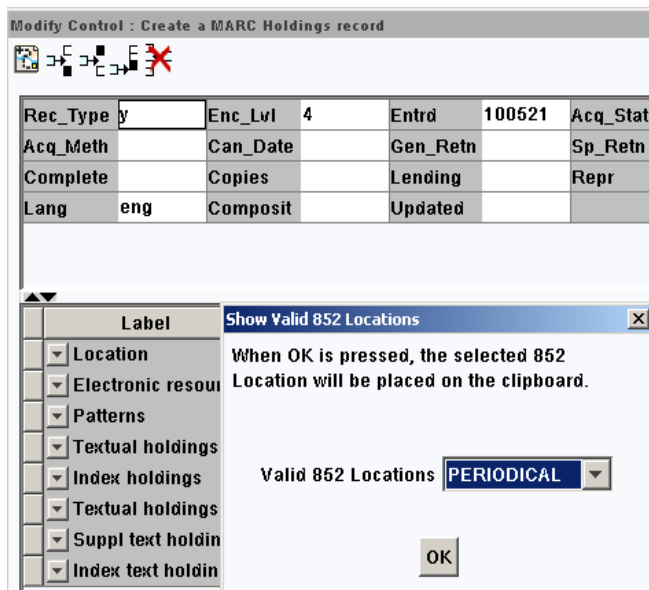
Rec_Type	y	Enc_Lvl	4	Entrd	090209	Acq_Stat	
Acq_Meth		Can_Date		Gen_Retrn		Sp_Retrn	
Complete		Copies		Lending		Repr	
Lang	eng	Composit		Updated			

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

Save Close

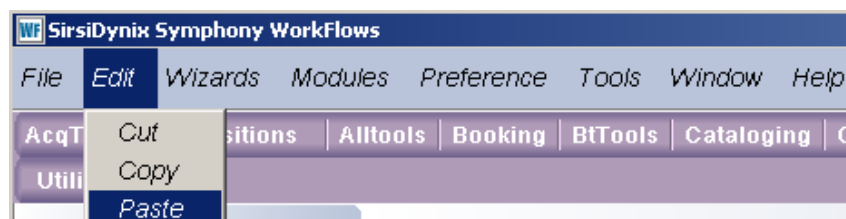
35. You MUST enter location in UPPER case next to subfield "c" in the 852 tag.

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



After selecting one, click the OK button.

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



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

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

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

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

Label	Tag	Ind.	Contents
Location	852		lcPERIODICAL
Electronic resource	856		
Patterns	853		
Textual holdings	866	0	CURRENT YEAR + 1 PREVIOUS YR
Index holdings	865		
Textual holdings	866	0	STORAGE: 1995 2000
Suppl text holdings	867		
Index text holdings	868		

Add Field Before

Add Field After

Append Field

Delete Field

Save Close

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

MARC Holdings Tab

Deleting MARC Holdings Record

Editing MARC Holdings Record

The screenshot shows the Backpacker software interface for creating a control ID SC-112. The 'MARC Holdings' tab is active. A dialog box titled 'Delete Serial Holdings Record' is open, showing a list of libraries and their linked locations. The 'WYLD' library is selected, and the 'Delete Holdings' button is highlighted.

Selected >	Library	Location - Linked to
<input type="checkbox"/>	CCHS	PERIODICAL- linked to S...
<input type="checkbox"/>	FREM	PERIODICAL- linked to S...
<input type="checkbox"/>	FREM	YA_PER-
<input type="checkbox"/>	FREM-DUBO	PERIODICAL- linked to S...
<input type="checkbox"/>	FREM-RIVT	PERIODICAL- linked to S...
<input type="checkbox"/>	LARM	PERIODICAL- linked to S...
<input type="checkbox"/>	LINC	PERIODICAL- linked to S...
<input type="checkbox"/>	LINC-ALPI	PERIODICAL- linked to S...
<input type="checkbox"/>	NATR	PERIODICAL- linked to S...
<input type="checkbox"/>	NATR-EDGE	PERIODICAL- linked to S...
<input type="checkbox"/>	NWC	PERIODICAL- linked to S...
<input type="checkbox"/>	SHER	PERIODICAL- linked to S...
<input type="checkbox"/>	SUBL	PERIODICAL- linked to S...
<input type="checkbox"/>	SWTR	PERIODICAL- linked to S...
<input type="checkbox"/>	SWTR-RKSP	PERIODICAL- linked to S...
<input type="checkbox"/>	SWTR-WMTN	PERIODICAL- linked to BA...
<input type="checkbox"/>	TETN	PERIODICAL-
<input type="checkbox"/>	WASH	PERIODICAL- linked to S...
<input type="checkbox"/>	WEST	PERIODICAL- linked to S...
<input type="checkbox"/>	WWCC	PERIODICAL- linked to S...
<input checked="" type="checkbox"/>	WYLD	PERIODICAL-

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

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

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

Linking MARC Holdings Record to Serials Control Record

The screenshot shows the 'Create Control' software interface. At the top, there's a title bar 'Create Control : Creating a Control ID SC-112'. Below it, a 'Backpack' section shows 'ID: SC-112' and 'Ctrl lib: WYLD'. A 'Link To Serial Holdings Record' dialog box is open, listing 'List of unlinked holdings records' with checkboxes for 'NEW HOLDINGS RECORD', 'FREM - YA_PER-', 'TETN - PERIODICAL-', and 'WYLD - PERIODICAL-'. The 'WYLD - PERIODICAL-' entry is checked. A 'Link to Holdings Record' button is highlighted with a red box. Below the dialog, a table displays various holdings records with columns for location and linked status.

	Location - Linked to
	PERIODICAL - linked to SC-389
	PERIODICAL - linked to SC-102
	PERIODICAL - linked to SC-52
	PERIODICAL - linked to SC-117
	PERIODICAL - linked to SC-25
	YA_PER-
	PERIODICAL - linked to SC-6
	PERIODICAL - linked to SC-10
	PERIODICAL - linked to SC-256
	PERIODICAL - linked to SC-91
	PERIODICAL - linked to SC-18
	PERIODICAL - linked to SC-268
	PERIODICAL - linked to SC-31
	PERIODICAL - linked to SC-383
	PERIODICAL - linked to SC-88
	PERIODICAL - linked to SC-71
	PERIODICAL - linked to SC-9
	PERIODICAL - linked to SC-354
	PERIODICAL - linked to BAC2009
	PERIODICAL-
	PERIODICAL - linked to SC-5
	PERIODICAL - linked to SC-128
	PERIODICAL - linked to SC-39
	PERIODICAL-

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

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

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

Template for New Serials Control Record: Subscription Tab

Backpacker
ID: SC-112
Ctrl lib: WYLD

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

Copies/Issues

Copies to receive: 1
Number of issues: 12
Expiration date: NEVER

Link for ordering/claiming

Fiscal cycle: [dropdown] Library: WYLD
Vendor ID: [dropdown] Order ID: [text] Line item #: [text]

Order History...

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

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

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

42. Move on to the Distribution tab.

Template for New Serials Control Record: Distribution Tab

Backpacker
ID: SC-112
Ctrl lib: WYLD

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

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

Create Control : Modifying A Serial Distribution

Backpacker
ID: SC-112
Ctrl lib: WYLD

Receiving 1 copies
ALL copies distributed

Distribution Information

Holding code: WYLDPER Update MARC holdings records
Copies expected: 1 Copies to add to catalog: 1

Modify Distribution Close

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

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

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

45. Click Modify Distribution button to close.

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

46. Skip to Extended Info tab.

Template for New Serials Control Record: Extended Info Tab

The screenshot shows a software window titled "Create Control : Creating a Control ID SC-112". At the top, there are icons for a book, a pencil, a trash can, and a refresh button. Below the icons, the text "Backpacker" and "ID: SC-112" is displayed. A horizontal tabbed menu contains the following tabs: "Basic", "Patterns", "OPAC Display", "MARC Holdings", "Subscription", "Distribution", "Binding", "Extended Info", "Expected", and "Routing". The "Extended Info" tab is selected and active. Inside this tab, there is a table with three rows. The first row has a dropdown menu with "PHYSFORM" selected and an empty text field. The second row has a dropdown menu with "NOTE" selected and a text field containing "SHELVE CURRENT ISSUE IN READING ROOM". The third row has a dropdown menu with "NAME" selected and an empty text field. Above the table, there are three small icons: a left arrow, a right arrow, and a red 'X' (delete).

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

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

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

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

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

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

Template for New Serials Control Record: Routing Tab

The screenshot shows a web-based interface for creating a new routing record. At the top, there are tabs for 'Basic', 'Patterns', 'OPAC Display', 'MARC Holdings', 'Subscription', 'Distribution', 'Binding', 'Extended Info', 'Expected', and 'Routing'. Below the tabs is a table with columns for 'Create A Routing', 'Library', 'Name', 'User ID', and 'Rank'. The main form area is titled 'Serial Control - Creating A New Routing' and contains the following fields:

- Backpacker ID: 50-116
- Ctrl lib: WYLD
- Routing Information section:
 - Copy: 1 (1 copy available for routing)
 - Library: WYLD
 - User ID: 29092000030106
 - rank: 1

At the bottom of the form, there are two buttons: 'Create Routing' (highlighted with a red box) and 'Close'. A red circle highlights a search icon (a diamond with a magnifying glass) located next to the User ID field.

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

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

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

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

Continue adding users to routing list.

53. When finished, return to Expected Tab.

Template for New Serials Control Record: Expected Tab

Create Control Record and Generate Predictions

Backpacker
Create Control : Creating a Control ID SC-117

Backpacker
ID: SC-117 Ctrl lib: WYLD

Prediction Records

Preview 12 expected issues starting with:

V. 38
NO. 2

Chronology: MAR 2009

Date first prediction: 02/10/2009

Date expected: 02/10/2009

Generate Predictions Save Prediction Redo Prediction Close

Create Control Return to Search New Search (b) Cancel

54. Click on Create Control button.

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

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

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

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

Refer to the TechNote on call number abbreviations for additional examples:

<http://will.state.wy.us/wyld/technotes/note002.html>

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

58. Click Generate Predictions button.

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

Backpacker
ID: SC-117
Ctrl lib: WYLD

Prediction Records

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

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

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

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

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

Newly created predictions will display.

59. If correct, click Save Predictions button.

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

Template for New Serials Control Record: Expected Tab

Generating Predictions

Backpacker
ID: SC-117
Ctrl lib: WYLD

Prediction Records

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

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

Confirmation: Predictions created [OK]

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

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

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

61. Click OK button in Confirmation window.

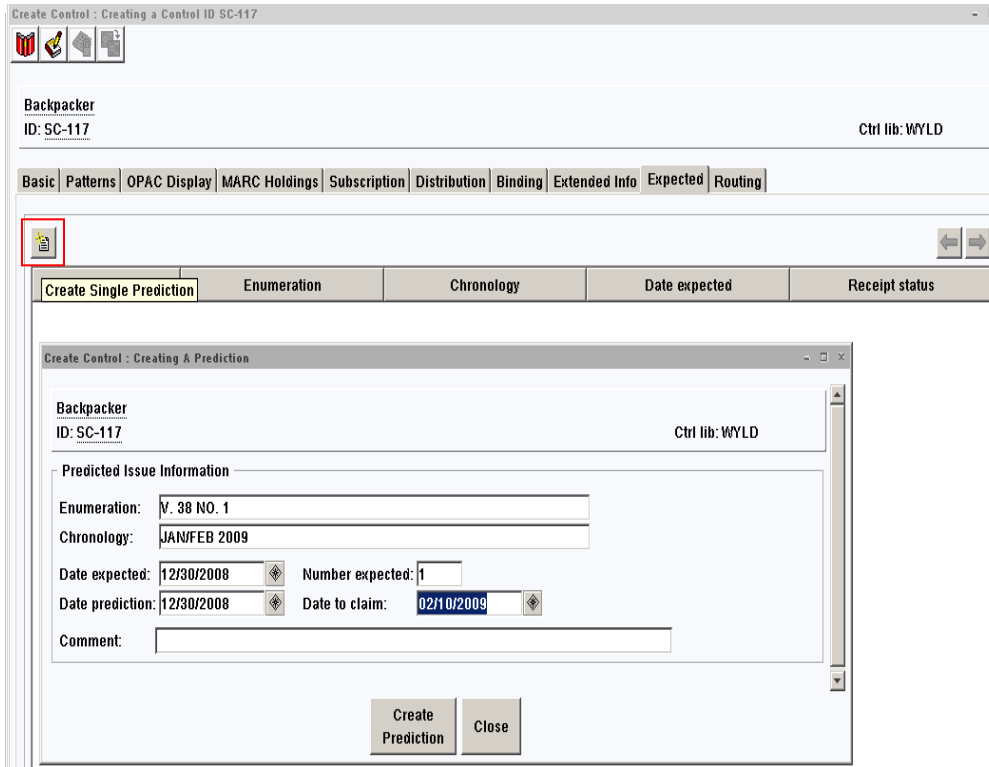
62. Click Close button.

Creation of new serials control record is complete.

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

Template for New Serials Control Record: Expected Tab

Create a Single Prediction



The Expected tab will be blank until Predictions are created.

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

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

Click Create Prediction button.