Manage serial issues

Find information about managing and receiving serial issues. Learn how to receive or unreceive an issue, start or stop receiving, and set publication patterns.

Overview

A serial is a publication issued in successive parts and continued indefinitely. A subscription is composed of parts called items. Example: periodicals.

Once you've found the serial (via Discover Items), then:

- Use the Issues screen to manage and receive issues from current subscriptions.
- Use the Item Copies screen for a comprehensive view of your serial holdings and the ability to edit them.

Note: Serials data migrated from an ILS into WMS does not show up on the Issues screen, so all current subscriptions must be manually added via Manage Issues.

Typical serial issue workflow

1. Create (add) issue
   - Required before doing 2 or 3
   - Created by any WMS Acquisitions library
2. Start receiving
   - Indicates you plan to start receiving. Also, triggers claiming notices.
   - Required before doing 3
   - Not required to receive issues (step 4), but required to have issues show up on the Missing Issues list for claiming when not received.
3. Set publication pattern
   - Not required before doing anything
4. Receive issue
   - Received by any WMS Acquisitions library

Search

1. Search for the serial in the Discover Items area on the left panel.
2. From the search results, click the serial's title.
3. From the Issues screen, filter as follows.
   a. Filter for issues to manage or receive
• **Date** - To filter by expected release date, use the calendar buttons.
• **Received** (Receive Issues only)
  - **All** - All issues
  - **Not received** - Issues that have not been received
  - **Partially/completely received** - Issues that have been partially or completely received

b. Filter results

• **Action**
  - **Manage Issues**
    - Delete issue - Click the red circle. An issue can be deleted only if no WMS library has received it.
    - Edit issue - Click the pencil button to edit the issue. Edits affect all WMS libraries that use the Issue screen. Edits do not affect local holdings records on the Copies screen.
  - **Receive Issues** - Click Receive to receive the issue. See Receive/unreceive issue below.
  - **Chronology** - The date the on the issue (e.g., August 2011; Spring 2008; Jan. 3-10, 2010; 2012).
  - **Copies received** (Receive Issues only) - The number of copies received (first number) and the total number expected (second number).
  - **Enumeration** - The alphabetic or numeric scheme used by the publisher on an item to identify the individual issue and to show the relationship of each issue to the serial as a whole.
  - **Expected release date** - The date the publisher ships the issue. If this date is unknown, subtract the estimated shipping time from the date received or expected.
  - **First received** (Receive Issues only) - The date on which the first WMS library received the issue.
• **Type**
  - **Basic** - A single issue (default)
  - **Index** - Issue that contains only an index
  - **Supplementary** - Any extra or bonus issue

### Manage issues (Add issue)

1. Click **Manage Issues** tab.
2. Click **Add issue**.
   a. On the Add Issue window, fill in Chronology and Expected Release (Shipping) Date. *(Optional)* Fill in the Issue Type and Enumeration.

#### Some fields need explanation

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chronology</td>
<td>Date or period of publication (year, quarter, season, month, week, day, etc.)</td>
</tr>
<tr>
<td>Enumeration (optional)</td>
<td>The numbering scheme used to organize the</td>
</tr>
<tr>
<td>FIELD</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-------</td>
<td>-------------</td>
</tr>
<tr>
<td></td>
<td>issues of a serial publication (volume, number, part, issue, etc.)</td>
</tr>
<tr>
<td></td>
<td>The number of levels of enumeration used for the serial.</td>
</tr>
<tr>
<td></td>
<td>Examples</td>
</tr>
<tr>
<td></td>
<td>0: no enumeration</td>
</tr>
<tr>
<td></td>
<td>2: volume, number</td>
</tr>
<tr>
<td></td>
<td>3: volume, issue, number</td>
</tr>
<tr>
<td></td>
<td>Note: To prevent duplicate issues, the first two levels of enumeration must be unique.</td>
</tr>
<tr>
<td></td>
<td>The date the publisher ships the issue. The system-supplied value is based on the Chronology you enter.</td>
</tr>
<tr>
<td></td>
<td>If this date is unknown, subtract the estimated shipping time from the date received or expected.</td>
</tr>
<tr>
<td></td>
<td>Automatically shows your changes as you make them.</td>
</tr>
<tr>
<td></td>
<td>Basic: A single issue (default)</td>
</tr>
<tr>
<td></td>
<td>Index: Issue that contains only an index</td>
</tr>
<tr>
<td></td>
<td>Supplement: Any extra or bonus issue</td>
</tr>
</tbody>
</table>

**Use item in hand for issue metadata**

When creating or editing issues, make sure the issue metadata (captions, chronology type, etc.) is based on the data from the issue itself. If you want to change the issue metadata to anything other than what appears on the issue itself, make these changes in your library’s WorldCat holdings. For more information, see [View and use serial item records](https://help.oclc.org/Library_Management/WorldShare_Circulation/Item_management/Manage_serial_issues).
<table>
<thead>
<tr>
<th>ON ISSUE</th>
<th>DESIRED OUTCOME</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Captions</td>
<td>v.1 i.3</td>
<td>v.1 n.3</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Chronology Type</th>
<th>Year, Month - e.g.</th>
<th>Year Only - e.g.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>v.1 i.1 2014 Jan.</td>
<td>v.1 i.1 2014</td>
</tr>
</tbody>
</table>

3. *(Optional)*. To create a date range, check the Create Range box. A second row appears under Chronology to provide an end date for the range.

4. Click Save. The issue is added and is available to all WMS libraries.

**Receive/unreceive issue**

**Before receiving**

1. You must have a copy (local holdings record) for the title in order to receive issues. Add copies (local holdings records) on the Copies screen. Group aware libraries will see copies owned by other libraries in the group.

2. The issue must appear on the Receive Issues tab. If it does not, it must be added. Add issues on the Manage Issues tab.

**Receive issue**

1. Click the Receive Issues tab.

2. Find the issue you want to receive. In the issue’s Action column, click Receive. The Receive Issues window appears, listing the library’s shelf copies (local holdings records) for the title. Group aware libraries will see copies owned by other libraries in the group and should be careful to receive serial issues on the appropriate copy.

3. On the Receive Issues window, there are two ways to receive an issue:
   a. Enter a barcode, which automatically receives the issue.
   b. Check the Received box without entering a barcode.

4. Click Save.
   - The Copies Received column shows the copy has been received.
   - An issue is created for the copy (local holdings record), which appears on the Issues and Copies screens (under Holdings for Selected Copy).
**Unreceive issue**

Unreceiving an issue does not change its first received date.

1. Click the **Receive Issues** tab.
2. Find the issue you want to unreceive. In the issue’s Action column, click **Receive** or **Unreceive** the Receive Issues window appears, listing the library's shelf copies (local holdings records) for the title.
3. On the Receive Issues window, deselect the Received checkbox. The checkmark and barcode disappear and Yes changes to No.
4. Click **Save**.
   - In the Copies Received column, the number of copies received decreases by the number of copies you unreceived.
   - The item record for the issue is removed from the copy (local holdings record), which appears on the Issues and Copies screens (under Holdings for Selected Copy).

**Start or stop receiving**

Once you have indicated the number of copies expected, the system adds copies not received to the Missing Issues screen (Claim & Cancel>Missing Serial Issues) in the Acquisitions module if these conditions are met:

1. The Expected Release Date is past
2. The issue has been received by another library, as indicated in the First Received column
3. Your library has received at least one, but not all, expected copies of the issue.

From the Missing Issues screen (Claim & Cancel>Missing Serial Issues), you can claim issues.

**Start receiving**

1. Click the **Receive Issues** tab.
2. Click **Start Receiving**.
3. On the Receiving Settings window:
   a. Enter the number of copies you expect to receive. All issues after the one you choose to start from will have this number.
   b. Choose the issue from which you expect to start receiving copies (any issue for which there are outstanding copies to be received).
4. Click **Save**.
   - The number of copies you expect to receive appears as the second number in the Copies Received column (n of n), starting with the issue you indicated and including all remaining, yet-to-be-received issues.
   - The **Start Receiving** button changes to **Stop Receiving**.
Change number of copies expected after receiving has started

1. Click the **Receive Issues** tab.
2. On the right side of the screen, above the Action column, click **Edit receiving settings**.
3. On the Receiving Settings window:
   a. Enter the **number of copies** you expect to receive.
   b. Choose the **issue** from which you expect to start receiving copies (any issue for which there are outstanding copies to be received). All issues after the one you chose will have the number you chose in step 1 in the Copies Received column (n of n).
4. Click **Save**.
   - The number of copies you expect to receive appears as the second number in the Copies Received column (n of n), starting with the issue you indicated and including all remaining, yet-to-be-received issues.

Stop receiving

1. Click the **Receive Issues** tab.
2. Click **Stop Receiving**.
3. On the Receiving Settings window, choose the issue from which you want to stop receiving copies (all remaining, yet-to-be-received issues will also be stopped).
   - Issues that have already been received will not appear in the list of issues from which you can choose to stop receiving.
   - If you know a particular issue will be your last, you should stop receiving with that issue, prior to receiving the issue.
4. Click **Save**.
   - Copies not received no longer automatically appear on the Missing Issues screen (Claim & Cancel>Missing Serial Issues) in the Acquisitions module.
   - The **Stop Receiving** button changes to **Start Receiving**.

Configure publication patterns

**Note:**

- You must have started receiving a serial before you can set its publication pattern. For more information, see Serial issue workflow above.
- Changing a publication pattern affects all WMS Acquisitions libraries that use it. Make sure any changes are accurate.

1. Click **Manage Issues** tab.
2. In the upper left corner of the screen, below the **Add issue** button, click **Edit** or the pencil icon.
3. In the Publication Settings window, select an option from the Publication Frequency list

**Publication Frequencies and default volume and number/issue settings**

Changing the publication frequency changes the default settings and the Most Recent and Next Predicted issues below the table in the Publication Frequency window.

Note: Biweekly and weekly settings require Chronology to include day, month, and year.

<table>
<thead>
<tr>
<th>PUBLICATION FREQUENCY</th>
<th>DESCRIPTION</th>
<th>INCREMENTS AFTER (ISSUE/NUMBER AFTER WHICH VOLUME INCREMENTS)</th>
<th>RESETS AFTER (ISSUE/NUMBER AFTER WHICH VOLUME RESETS TO 1)</th>
<th>RESETS AFTER (ISSUE/NUMBER AFTER WHICH ISSUE/NUMBER RESETS TO 1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual</td>
<td>Once per year</td>
<td>1</td>
<td>Never</td>
<td>1</td>
</tr>
<tr>
<td>Bimonthly</td>
<td>Once every two months</td>
<td>6</td>
<td>Never</td>
<td>6</td>
</tr>
<tr>
<td>Biweekly</td>
<td>Once every two weeks</td>
<td>26</td>
<td>Never</td>
<td>26</td>
</tr>
<tr>
<td>Daily</td>
<td>Once every day</td>
<td>365</td>
<td>Never</td>
<td>365</td>
</tr>
<tr>
<td>Every 2 Years</td>
<td>Once every two years</td>
<td>2</td>
<td>Never</td>
<td>2</td>
</tr>
<tr>
<td>Every 3 Years</td>
<td>Once every three years</td>
<td>2</td>
<td>Never</td>
<td>2</td>
</tr>
<tr>
<td>Monthly</td>
<td>Once per month</td>
<td>12</td>
<td>Never</td>
<td>12</td>
</tr>
<tr>
<td>Quarterly</td>
<td>Once every three months</td>
<td>4</td>
<td>Never</td>
<td>4</td>
</tr>
<tr>
<td>Semianannual</td>
<td>Twice per year</td>
<td>2</td>
<td>Never</td>
<td>2</td>
</tr>
<tr>
<td>Weekly</td>
<td>Once per week</td>
<td>52</td>
<td>Never</td>
<td>52</td>
</tr>
<tr>
<td>3-Year</td>
<td>Three times per year</td>
<td>3</td>
<td>Never</td>
<td>3</td>
</tr>
</tbody>
</table>

4. You will see a display of Predicted issues. Check carefully to ensure that the pattern is correct. Adjust as needed.
5. Click **Save**. The publication pattern is set. The next time a WMS Acquisitions library receives an issue, the system automatically generates the next issue, so it can be received or claimed by your library.

**Configure columns and download data**

**Configure columns**

1. On the left side of the screen, next to the Rows drop-down list, click the Configure button (⚙️).
2. In the Show Columns window, check or uncheck the columns you want to show or hide. The columns you checked or unchecked are shown or hidden.
3. Close the Show Columns window by clicking anywhere outside it.

**Download issue data**

You can download the data on the screen as a comma-separated values (CSV) file. To download more data, increase the rows on the screen by using the **Rows** list.

1. On the right side of the screen, next to the Refresh icon, click the **Export button** (🔗).