



Metro Library Serials

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CHRONOLOGY AND ENUMERATION

When a grid is created, it will be populated with the chronology and enumeration for all expected issues for the entire year:

Chronology – the issue date (i.e. October 2019, 18 April 2019, Summer 2019, etc.).

Enumeration – the volume number and issue number. This is indicated with a lowercase 'v' and 'n' (i.e. v 23 n 2).

The chronology and/or enumeration of a periodical can change at any time during the year. Therefore, it is crucial that both the chronology and enumeration are verified **before** checking-in every issue. You must locate the chronology and enumeration that is printed on or inside each issue. Verify that both match the chronology and enumeration of the expected issue listed in the grid.

If they do not match, you must notify serials@metrolibrary.org so the grid can be updated before you check-in the issue. Failure to comply to these instructions will result in the inability of placing holds on correct magazine issues, as well as claims being submitted for incorrect or non-existent issues.

What About Newspapers?

Because newspapers are not applicable for holds, enumeration does not apply to them. Grids for newspapers will only contain the chronology (issue date). However, it is still important to verify the correct chronology before checking-in newspaper issues. Email serials@metrolibrary.org if you come across any incorrect issue dates in your grid.

PERIODICALS NOT FOUND IN CARLX

Your location may occasionally receive a periodical that cannot be found in CARLX. Often these are new subscriptions not yet entered in the catalog, freebies from the publisher to solicit a subscription, or gift subscriptions donated from the publisher or library guest. **Never create temporary records for these unknown titles or issues.** Email serials@metrolibrary.org to determine what course of action will need to be taken.

DUPLICATE ISSUES

Your location will usually receive duplicate periodical issues as every new year approaches. These are unavoidable and are usually caused by overlapping orders during the renewal period. **Never create temporary records for these duplicate issues.**

When any duplicate issues arrive, it's important that our periodical vendor is notified so the subscriptions can be corrected, and the duplicates resolved. Therefore, when your location receives duplicate issues, please follow the procedure below:

1. Scan or take a photo of the mailing label on **both** duplicate issues.
2. Email the scans/photos along with the magazine title to serials@metrolibrary.org.

These steps only need to be done *once per title*. Your location should keep a list of titles that you have already scanned and emailed. You can then check-in one copy and send the duplicate issue to the Friends.

WHEN A PERIODICAL CEASES PUBLICATION OR IS DROPPED

Occasionally, a periodical will discontinue publication. At other times, your location may drop its subscription to a title. In either case, you will receive a notification email from Greg Bennett or Miranda Thomas in Collection Development confirming this change. Libraries may determine whether or not to retain back issues of a ceased/dropped periodical, depending on shelf space, usage, etc.

CLAIMING PERIODICALS

Claiming is the process of requesting a replacement issue of a periodical that is past-due or received damaged. Issues that are past-due (i.e. that have exceeded the Expected Date in the grid) are automatically added to the Claim Alerts list for every location, where they will be submitted electronically to our periodical vendor, WT Cox. Claiming for all offices and locations is handled by Greg Bennett.

ISSUES RECEIVED DAMAGED IN THE MAIL

If your location needs to claim an issue that was received damaged in the mail, you'll need to email serials@metrolibrary.org and include the following information:

- Title of Periodical
- Issue Date and Enumeration of the Damaged Issue
- Your Location
- This should be done as soon as possible to ensure that a replacement issue will be available.

DAMAGED OR MISSING NEWSPAPERS DELIVERED TO YOUR BOOK DROP

If a location is missing any newspapers or receive a newspaper in your book drop damaged beyond repair, email serials@metrolibrary.org as soon as possible so a claim may be submitted for a replacement.

NOTE: We cannot submit claims for any periodicals already checked-in or damaged by guests.

WITHDRAWING PERIODICALS

Pulling and withdrawing magazines and newspapers can be performed whenever needed. Typically, most locations pull and withdraw magazines in bulk annually, while newspapers are usually pulled every month. The retention level of periodicals will vary from location to location, depending on the shelf space available. Currently, the general procedure for magazines is that each location will keep no less than a rolling twelve-months' inventory of issues, and no more than the current calendar year and the previous calendar year.

All withdrawn magazine issues are to be sent to the Friends, while pulled newspapers should be discarded in a recycle bin (if one is available at your location).

NEWSPAPERS

Newspapers, Financial Periodicals, and J.D. Power Guides (or any periodical without an item number) – when these are pulled, the serials grids must be updated. The reason for this is that the catalog will use the expected and received issues listed in the grids in CARL to populate the information displayed in the catalog.

When these are pulled for discard, contact serials@metrolibrary.org with the following information:

- Title of Periodical
- Issue Dates Pulled

Keep it simple. State "Oklahoman – pulled Feb 1 to 15" or "USA Today – all April issues pulled".

MAGAZINES

When pulling and withdrawing magazine issues, there is **no** need to contact serials@metrolibrary.org.

RENEWAL NOTICES

The periodicals your location subscribes to are renewed annually by Collection Development. All periodical renewal notices may be discarded except for the following titles:

- Black Chronicle
- Norman Transcript
- Stillwater News-Press

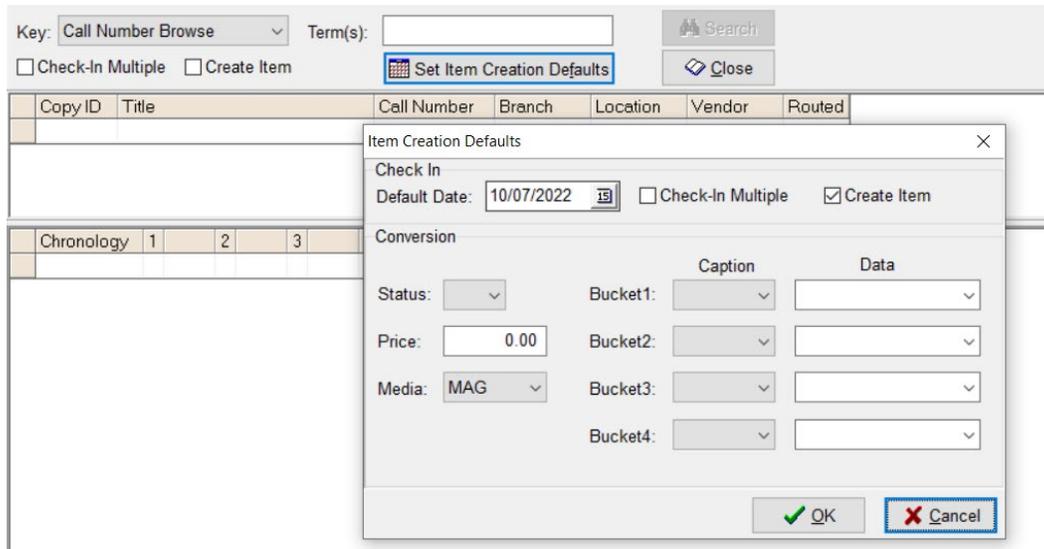
If your location subscribes to any of the newspapers listed above and you receive a renewal notice or invoice, please send those to Greg or Miranda in Collection Development.

CARL.X SERIALS

SETTING DEFAULTS

Staff can set defaults in CARL.X to help the process of checking in magazines.

In CARL.X, when you navigate to the **Serials** tab, select **Set Item Creation Defaults**. You can change the Media to **MAG**. This way, you only need to verify the Media code is correct when creating items. Also, check **Create Item** to ensure items are properly checked in.

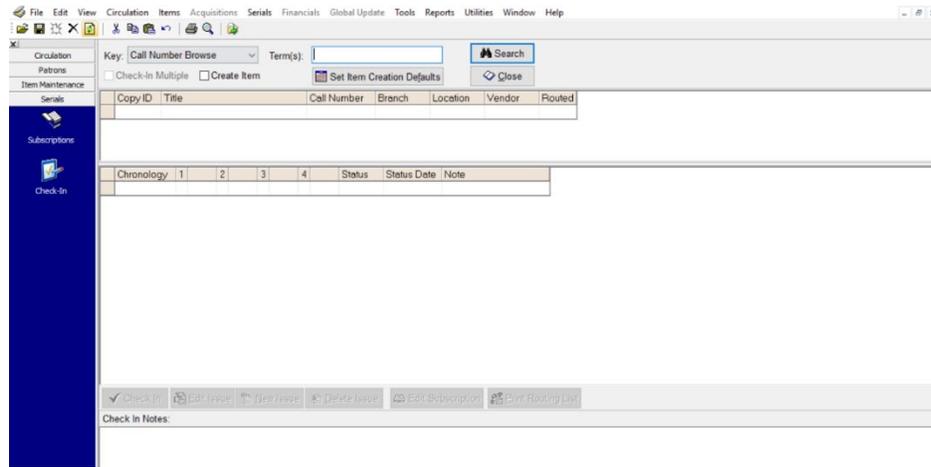


CHECK IN NEWSPAPERS

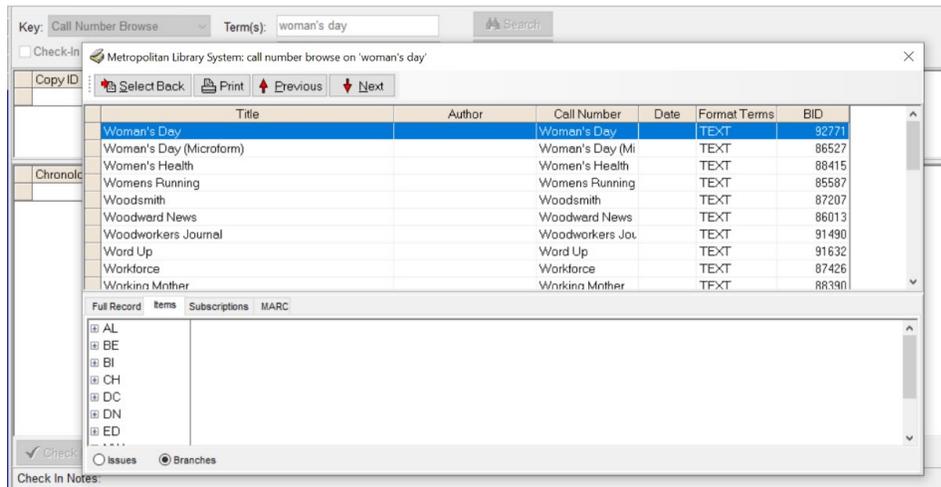
1. In CARLX, select the **Serials** tab.
2. Click **Check-In**.
3. Select *Call Number Browse* for the **Search Key** and search for the title.
4. Select the title from the list.
5. Back on the Check-In screen, look under the **Copy ID** column and *confirm that only your location is highlighted*.
6. **Uncheck** the **Create Item** option.
 - a. If you forget this step, it's okay! When you hit the **Check In** button, you'll select **Cancel** and it'll check the newspaper in correctly.
7. In the grid of expected issues, locate and highlight the issue you want to check-in.
8. Click the **Check In Button** at the bottom of the page to check-in the issue. The date will automatically drop off the page once checked in, so make sure you single click **Check In**.

CHECK IN MAGAZINES

1. In CARLX, select the **Serials** tab.
2. Click **Check-In**.
3. Select *Call Number Browse* for the **Search Key** and search for the title.



4. Select the title from the list.



- Back on the Check-In screen, look under the **Branch Column** and confirm that only your location is highlighted.

Key: Call Number Browse Term(s): woman's day Search

Check-In Multiple Create Item Set Item Creation Defaults Close

| CopyID | Title | Call Number | Branch | Location | Vendor | Routed |
|--------|-------------|-------------|--------|----------|--------|--------|
| 1 | Woman's Day | Woman's Day | DN | MZ | WTCOX | N |
| 1 | Woman's Day | Woman's Day | BI | MZ | WTCOX | N |
| 1 | Woman's Day | Woman's Day | BE | MZ | WTCOX | N |
| 1 | Woman's Day | Woman's Day | CH | MZ | WTCOX | N |

| Chronology | 1 | 2 | 3 | 4 | Status | Status Date | Note |
|----------------|------|------|---|---|----------|-------------|------|
| May 2019 | v 82 | n 6 | | | Expected | 5/1/2019 | |
| June 2019 | v 82 | n 7 | | | Expected | 6/1/2019 | |
| July 2019 | v 82 | n 8 | | | Expected | 7/1/2019 | |
| September 2019 | v 82 | n 9 | | | Expected | 9/1/2019 | |
| October 2019 | v 82 | n 10 | | | Expected | 10/1/2019 | |
| November 2019 | v 83 | n 1 | | | Expected | 11/1/2019 | |
| December 2019 | v 83 | n 2 | | | Expected | 12/1/2019 | |

Check In
 Edit Issue
 New Issue
 Delete Issue
 Edit Subscription
 Print Routing List

Check In Notes:
Issue price: \$1.70

- Make sure the **Create Item** option is selected.
- In the grid of expected issues, locate and highlight the issue you want to check in.
- Make sure both the **issue date** and **enumeration (volume and issue number)** match what is printed in the issue. If either doesn't match, do not check in the issue. Instead, send an email to serials@metrolibrary.org to get the grid corrected.

- Click on the **Check In Button** at the bottom of the page and the **Item Editor** box will appear.

- Scan-in the item number.
- Enter the **Issue Price**. Use the same price that is located at the bottom of the screen in the **Check In Notes** field. (A dollar sign is not needed.)
- Confirm that the **Location Code** is set to **MZ** or **JMZ** (or **REF** if this is a non-circulating issue).
- Confirm that the **Media Code** is set to **MAG**.
- Click the **Save Button** to check-in the issue.
- Place the barcode parallel along the spine, add the location label, and RFID tag on the inside of the last page. Open the **Write Tags** program on the desktop to process the RFID tag.

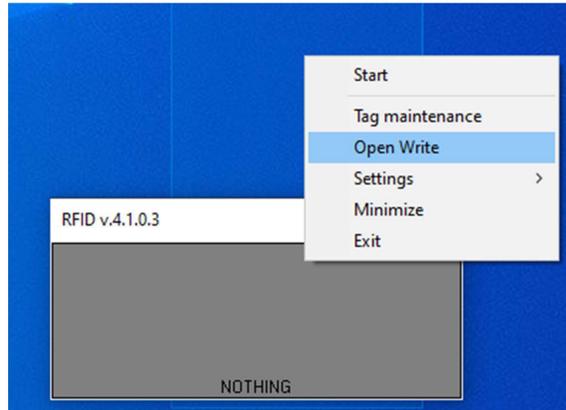


- Note:** Barcodes should be placed uniformly, for ease-of-use when checking out materials. **Place the barcode lengthwise along the spine, on the front cover of the item.** This allows magazines to be stacked and scanned quickly and easily. The exact location along the spine (towards the top or bottom edge of the item) is less important.
- To maintain uniformity, please place library labels near the bottom edge of the front cover.

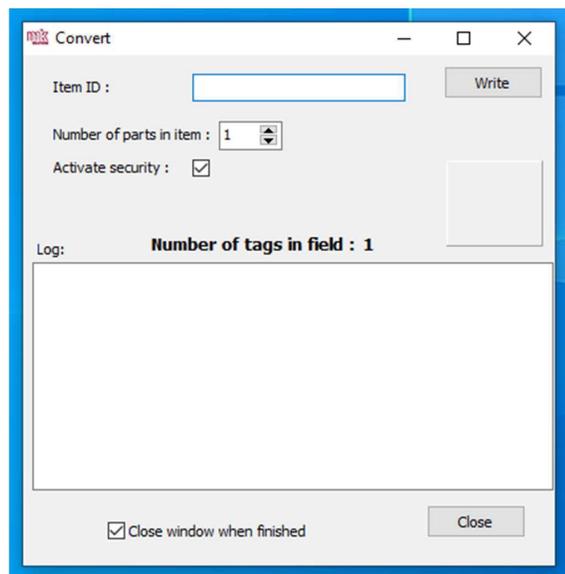
ADDING RFID TAGS

Each location has a designated computer to process RFID tags. You will need to be at that computer to activate the RFID tag.

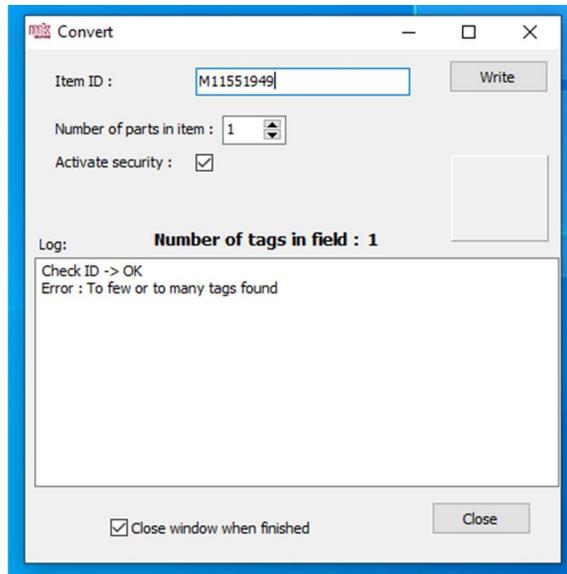
1. Add the RFID tag to the item in the proper location. For magazines, the RFID tag should be on the inside of the last page.
2. Right click on the RFID window, then click "Open Write".



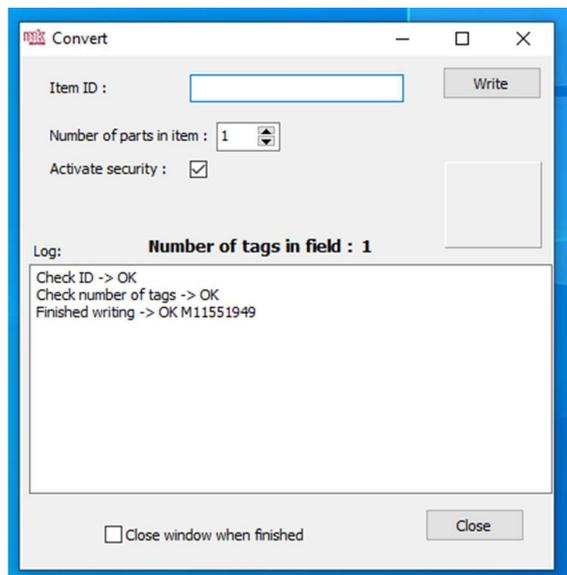
3. In this Write Tag screen, make sure your cursor is in the Item ID field before scanning a barcode on the item.



4. Scan the item. You will see a message in the log.
 - a. The error message is indicating that it did not find a tag to write. You'll want to move the item on the RFID pad.



- b. When you scan the item's barcode and place it on the pad and it says "finished writing", ensure the barcode matches what is on the item on the RFID pad. If it does not match, re-write the tag by repeating the process.



5. Click "Close window when finished" if you are only writing one tag. When your tag is written, the "Write Tag" window will close. If you are writing multiple tags, make sure this box is not checked.

HOLDS ON MAGAZINES

Holds may be placed on magazines. The process to route holds on magazines are as follows:

1. Paperclip the hold slip to the magazine.

2. Check in the item to place it In Transit.
3. Place the magazine in an interoffice envelope then in the mail bin.
4. Magazines should be processed alongside the rest of their delivered reserves.
5. Holds on magazines should be shelved with ILLs, separate from the hold shelves on the public floor.

SERIALS CONTACT INFORMATION

For questions regarding checking-in issues, enumeration, withdrawing, claiming, and general serials management:

Greg Bennett
Serials Technician
Collection Development
serials@metrolibrary.org

For questions regarding subscriptions and renewals:

Miranda Thomas
Collection Development Supervisor
Collection Development
miranda.thomas@metrolibrary.org

To request additional magazine barcodes:

Submit a request on the Intranet under Resources > Supplies > Collection processing.