

1. Introduction

Members and SWAN staff introduced themselves. Meeting facilitated by Samantha Dietel (SWAN Bibliographic Services Consultant), Scott Brandwein (SWAN Bibliographic Services Manager).

2. Status of Chronology Project

Bib Services has contacted most libraries with control records on “weekly” titles, and records have been updated to record chronology only in the call number. This project is a follow-up to the decision to record chronology only for popular magazine titles, effective January 2019.

Conversation followed regarding sorting in WorkFlows for the “monthly” titles. LGS and TPS report they are still seeing monthlies that are still sorting alphabetically instead of chronologically. Further conversation showed it is most likely a local setting in the properties for the wizard in WorkFlows.

3. Serials Record/Control Clean-Up Status Report

Scott reported this project had been put on hold to allow for some other projects but is being picked back up now.

Libraries should remove item records and MARC holding statements before removing a control record. If you remove the control record before the MARC holdings they will remain attached to the bib record and show in Enterprise. If you no longer carry a title you can remove the entire control record; it is not necessary to wait before removing it. SWAN developed [documentation](#) for removing a control record based on member request.

Members asked if we can have an enhancement request to sort received issues by chronology rather than date received? A member pointed out you can set your properties to show more issues per page which will cut down on the number of pages you need to go through.

When SWAN creates a new bib for the weeklies you can either create a new control record on the new bib, then remove the control record from the old bib or you can use the Change Title Link Helper to transfer the control to the new record. Predictions will travel with the control. Library staff expressed interest in doing this both ways. Sam cautioned that if you create a new control record on the new title, make sure that the old control is deleted at some point after your retention period has passed.

4. Demo: BLUEcloud Analytics Reports for Serials

Sam demonstrated the new BLUEcloud Analytics reports she created for Serials. Members were very excited to see them. There was a request for a report that would list control records with no received issues. This was added to the list of reports to create.

5. Chronology Patterns: Custom Lists

Sam demoed how to choose a Chronology Type of Custom and enter a custom terms list in WorkFlows.

Discussion regarding custom lists included:

- There is an increase in titles that seem to be changing the publication statements and going to fewer issues per year
- If you have an expected issue that has moved to claimed, you must remove the claim before you can check it in

SWAN Serials User Group Notes

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- Patterns change all the time, which can be frustrating
- *Entertainment Weekly* announced the digital will be weekly, print will be monthly?
- Custom chronology may help but may not. You might be better off using the special issue checkin

Scott mentioned there may be sorting issues with the odd publications. Let him know if there are things you want to have him include in the sorting for WF and Enterprise

6. Discussion: Claiming

TPS runs a List Serial Claims report every month and investigates but does not use the electronic claiming function within WorkFlows. They prefer to go through the list manually because predictions may just need to be adjusted.

We do not currently have anyone using the WorkFlows electric claiming function, most libraries just take the information from WorkFlows and manually enter in their vendor's customer portal. If you are interested in using EDI claiming, please send in a ticket and SWAN would be happy to work with you.

7. Open Discussion

How do you automatically have a price entered in the item when checking in an issue? You can use a holding code for issues that have the same price. Use the default holding code, then edit for anything different. Submit a ticket if you want a price entered in your holding code.

Receiving but not adding copies - does anyone do it? Yes, many do. Specifically for newspapers.

For titles that are completely irregular, do you have a serial control? Some libraries do, some do not. The constant upkeep of the control record for a title whose publications are out of pattern causes some to simply enter items in Cataloging.