Recommendations for Print Periodicals in the Washington Research Library Consortium

The following are recommendations for print periodicals written by the Serial Holdings Subgroup and approved by the Metadata Committee in fiscal year 2023.

The purpose of these recommendations is to standardize serial holding and item records in the WRLC Alma Institution Zones, and to facilitate the discovery of print periodicals in the WRLC instances of Primo VE.

Every effort should be made to adhere to the following recommendations for newly cataloged print periodicals. Legacy records should be corrected only as time and resources allow.

Recommendations for Item Records

1. Item records for print periodicals should have enumeration and/or chronology information.
2. Description of item records for periodicals should follow the guidelines specified in the

   [WRLC Item Description Policies and Templates](#) document. This uniformity ensures all schools use the same enumeration and chronology fields in the item record for the same pieces of information.
3. Item records should use one of the following item material types to describe periodicals : Issue, Serial, Journal, Book, or Bound issue.
4. Avoid using temporary locations for print periodicals. If items are in a temporary location, the holdings statement in the 866 field does not display in Primo VE ; instead, an ad-hoc holdings statement is created by Primo, which is not always accurate (for instance, the ad-hoc statement created by Primo will not display any gaps in holdings).

Recommendations for Holding Records

5. Holding records for print periodicals should have one summary statement in an 866 field.
6. It is recommended to not have more than one of each public 8XX field in the holding record. In Primo VE, the entirety of the holdings summary is not displayed automatically if there are repeating fields or subfields; only the first instance of each 8XX field and subfield is automatically displayed in Primo VE.

Recommendations for Primo Configuration

7. Primo VE should be configured to display the complete summary holdings in the Locations section; the default setting is to display a partial holdings summary. Information about this configuration can be found in the Configuring Additional Holdings Fields for Display in Primo VE Knowledge Center page.

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