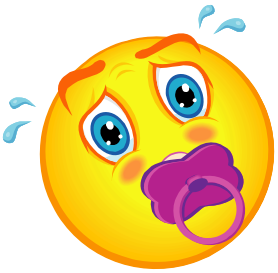
NASIGuide: How to Survive as a New Serialist

By ***Glenda Griffin***
Serials Catalog Librarian
Newton Gresham Library
Sam Houston State University
Huntsville, Texas



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What is a Serialist?

Sylvia Martin (2000, 1-2), retired coordinator of Resource Services at Vanderbilt University, published a guest editorial in *Serials Review* in 2000 in which she addressed the definition of the term, "serialist". Generally, dictionary definitions do not adequately describe the term in relation to its popular usage in the library world regarding those who deal with serial publications. Experts on the SERIALST electronic discussion list responded to a query from Martin with thoughtful considerations of the word's origin and definition. Martin's analysis of these

responses elicited her conclusion, "I'm not sure that there is an absolute definition for "serialist" at this time. The consensus seems to be that the word is an offshoot from NASIG that refers to individuals or groups with serial interests and concerns" (Martin 2000, 2).

Of the undoubtedly large number of persons or groups involved with serials, many are publishers, journal vendors, librarians, and library staff. The librarians and library staff are the primary focus of this survival guide, with particular emphasis on those who are new to the vocation, although other "newbies" in related fields or occupations may find this information useful. The arrangement of the following information broadly parallels the chronological progression of a serialist's development in a library setting.

Assess Needs

A newly hired serialist will do well to focus first on the skills, tools, and resources required to perform the job. Employers often provide employees with many resources including books for professional reading, internet sources, and manuals for the integrated library system. Additionally, employees often receive copies of their job description. All of these resources can be utilized for needs assessment.

Study the Job Description

An examination of the official job description can reveal clues. For instance, if the job description states that the employee will be involved with revising and developing policies and procedures, the serialist will need to know where to find or view copies of any previously established policies and procedures. Also, a job description will often name specific resources the serialist should be familiar with, such as AACR2, Connexion, CONSER guides, Ebsco.net, LCSH, etc. (see "Discover Print and Online Resources" below). If the position itself has been newly created, a job description may not exist. In this case, the new serialist will want to conduct fact-gathering missions and interviews with supervisors and administrative personnel to ascertain what expectations are to be met. For further information new serialists may consider researching similar job descriptions of positions at other institutions.

Determine Training Needs for the ILS (Integrated Library System)

For many institutions and places of employment, an integrated library system (ILS) will be in place. If the serialist does not have previous experience with the ILS, time should definitely be spent investigating, researching, and learning the new system. Most of the serialist's work will be performed utilizing this important and often-complex tool. Specific ILS-related documentation, manuals, and websites are important resources to identify and locate. Locating and studying these resources can provide knowledge, as well as revealing training opportunities.

Many ILS vendors provide training. SirsiDynix, for example, has a client care portal which contains a great deal of information including times, dates, fees, and registration instructions for training on SirsiDynix products. ExLibris' website provides a listing of webinars on various relative topics as well as information on significant conferences and meetings.

Some information on ILS vendor websites is readily available, although some may require authentication for access. The employer should be able to provide the serialist with password and identification information to access sheltered information on the website for the particular ILS in the workplace. Additionally, many vendors communicate details regarding their ILS via users' groups and electronic discussion lists.

Remain Positive

The seemingly staggering amount of knowledge to assimilate and learn may initially swamp a new serialist. "The new serialist with little serials experience, facing what might seem like mountainous expectations, might find this initial assessment stage overwhelming," says Laura Sill in her 1999 article for *Library Resources & Technical Services.* "The process might have the unfortunate effect of reinforcing how much is not known, rather than highlighting positively what needs to be learned to fulfill the charge of serialist" (Sill 1999, 249). Sill recommends that those new to the profession take stock of their own valuable experience and proficiencies in other library specialties or previous vocations, "because an assessment of the past, coupled with the analysis of the current role as serialist, will complete the needs assessment, prepare the new serialist for the areas of learning that lie ahead, and boost confidence" (Sill 1999, 249).

Train and Apply

Confidence will increase as training progresses and the new serialist applies accrued knowledge to accomplish work. This initial period of new growth can be enhanced by reliable, efficient access to tools and resources as well as positive support in the work environment.

Know Who Will Pay for Training and Continuing Education

Support in the form of available financial resources will greatly affect the type and quantity of continuing education and training events. Training sessions, such as online webinars or tutorials, can sometimes be taken free-of-charge through entities such as OCLC. OCLC and other entities may also sometimes charge a fee for training sessions, webinars, etc.

The training events may occur online or come in the form of conferences, workshops, or meetings which require travel to a designated site. For training or continuing education that costs money, a serialist will need to focus on the training that is the most relevant to the position and determine how much and how often financial support will be available by communicating with supervisors and administrators. "Administrations that emphasize the importance of training and development for library employees and back this belief with supportive decisions and funding should be commended" (Sill 1999, 252).

Employers may furnish all, part, or none of the monetary resources required. If partial or no funds are offered, the decision to incur personal costs or look elsewhere for training falls to the serialist. The serialist may choose to support educational and training needs from a personal

budget, while remaining secure in the knowledge that any pertinent vocational development is also an investment in one's own profession.

Professional support often arises from groups and organizations such as NASIG, ALA, and state library associations in the form of awards and stipends to help individuals attend conferences and meetings. Consider these examples:

- ALA awards: http://www.ala.org/ala/awards/awards.cfm
- ALCTS awards: http://www.ala.org/ala/alcts/awards/awards.cfm
- LITA awards and scholarships: http://www.ala.org/ala/lita/litaresources/litascholarships/litascholarships.cfm
- NASIG awards: http://www.nasig.org/awards/

The above list is by no means comprehensive. Many more financial resources may be available elsewhere. To find resources available through a local or regional ALA chapter or association, see http://www.ala.org/ala/ourassociation/chapters/stateandregional/stateregional.cfm.

Learn about Associations and Organizations

Professional library or library-related associations and organizations frequently craft Web sites rich with information, resources, and details. Explore the premium offerings on the following sites:

Websites

- ACRL: http://www.ala.org/ala/acrl/aboutacrl/aboutacrl.cfm
- ALCTS: http://www.ala.org/ala/alcts/alcts.cfm
- ALCTS Serials: http://www.ala.org/ala/alcts/sections/serials/default.cfm
- American Library Association: http://www.ala.org/
- CONSER: http://www.loc.gov/acq/conser/
- Dublin Core Metadata Initiative: http://dublincore.org/
- IFLA: http://www.ifla.org/
- Library of Congress: http://www.loc.gov/index.html
- LITA: http://www.lita.org/ala/lita/litahome.cfm
- Local or regional ALA chapters or associations: http://www.ala.org/ala/ourassociation/chapters/stateandregional/stateregional.cfm
- Medical Library Association: http://www.mlanet.org/
- NASIG North American Serials Interest Group: http://www.nasig.org/
- NISO: http://www.niso.org/home
- OAI: http://www.openarchives.org/
- PCC: http://www.loc.gov/catdir/pcc/
- OCLC: http://www.oclc.org/default.htm
- SCCTP: http://www.loc.gov/acq/conser/scctp/scctp-home.html

Many of these organizations offer memberships. Although the new serialist will want to consider membership with an eye on the budget and on the clock, the time and money invested in joining professional organizations provides worthwhile occasion for networking with others in the field, as well as opportunities to attend conferences, meetings and workshops. Consider the following examples:

Conferences, Meetings, and Workshops

- ACRL Events and Conferences: http://www.ala.org/ala/acrl/acrlevents/acrleventsconferences.cfm
- ALA Events and Conferences: http://www.ala.org/ala/events/eventsconferences.cfm
- ALA-affiliated local or regional library association conferences: http://www.ala.org/ala/ourassociation/chapters/stateandregional/stateregional.cfm
- Cataloger's Learning Workshop. Available Workshops: http://www.loc.gov/catworkshop/workshops.html
- IFLA Annual conference: http://www.ifla.org/IV/index.htm
- International Conference on Dublin Core and Metadata Applications http://dc2008.de/
- LITA Events and Programs: http://www.lita.org/ala/lita/litaevents/litaeventsprograms.cfm
- Local, state, and regional consortia and state libraries – may sponsor workshops, etc.
- NASIG Annual Conference: http://nasig.org/public/conferences.html
- NISO News and Events: http://www.niso.org/news
- SCCTP Workshops: http://www.loc.gov/acq/conser/scctp/scctp-home.html

In addition to the benefits of networking and conferences, library-related organizations provide other opportunities for the new serialist to grow and learn.

Find Webinars and Online Training

Many organizations, institutions and associations offer online training. Consider these examples:

- ALCTS: http://www.ala.org/ala/alcts/education/alctsceevents/events.cfm
- Cataloger's Learning Workshop: http://www.loc.gov/catworkshop/
- Current ILS vendor (see Determine Training Needs for the ILS above)
- Dublin Core Metadata Training Resources: http://dublincore.org/resources/training/
- OCLC Connexion Browser tutorials: http://www.oclc.org/support/training/connexion/browser/tutorial/
- OCLC Connexion Client tutorials: http://www.oclc.org/support/training/connexion/client/tutorial/
- OCLC Online Learning: http://www.oclc.org/community/education/elearning/default.htm
- OCLC Online Training for OCLC Services: http://www.oclc.org/community/education/tutorials/default.htm
- OCLC PARcasts: http://www.oclc.org/programsandresearch/parcasts/default.htm
- OCLC Training: http://www.oclc.org/support/training/default.htm
- OCLC WebJunction: http://www.oclc.org/webjunction/default.htm

- Palinet: http://www.palinet.org/
- Solinet: http://www.solinet.net/

The above list is by no means comprehensive. Many online training resources may be available elsewhere. To find resources available through a local or regional ALA chapter or association, see http://www.ala.org/ala/ourassociation/chapters/stateandregional/stateregional.cfm. Serialists may also obtain many additional sources of valuable information in other formats and types.

Discover Print and Online Resources

Many libraries maintain print professional reading collections both for training purposes and ongoing reference. These collections put useful materials at hand for librarians and staff. Additionally, the serialist will find many other important tools available online and in print, many of them essential. Consider the following examples:

Books

- *Anglo-American Cataloging Rules*, 2nd ed., 2002 revision, 2005 update, prepared under the direction of the Joint Steering Committee for Revision of AACR, a committee of the American Library Association ... [et al.]. Chicago: American Library Association, 2005-
- *CONSER Cataloging Manual*, edited by Les Hawkins, Serial Record Division. Washington, D.C.: Library of Congress, Cataloging Distribution Service, 2002-
- *CONSER Editing Guide*, prepared by the staff of the Serial Record Division under the direction of the CONSER Operations Coordinator. Washington, D.C.: Cataloging Distribution Service, Library of Congress, 1986-
- *Dewey Decimal Classification and Relative Index*, 22nd edition, devised by Melvil Dewey; edited by Joan S. Mitchell ... [et al.]. Dublin, Ohio: OCLC Incorporated, 2003.
- *Library of Congress Subject Headings*, 30th ed., prepared by the Cataloging Policy and Support Office, Library Services, Library of Congress. Washington, D.C.: Library of Congress, Cataloging Distribution Service, 2007.
- *Organization of Information, The*, 2nd ed., by Arlene Taylor. Westport, Conn.: Libraries Unlimited, 2004.
- *Understanding FRBR: What it is and How it will Affect Our Retrieval Tools*, edited by Arlene Taylor. Westport, Conn.: Libraries Unlimited, 2007.
- *Wynar's Introduction to Cataloging and Classification*, revised 9th ed., by Arlene Taylor. Westport, Conn.: Libraries Unlimited, c2004.

Print and Electronic Journals

- *Against the Grain* (also available online)
- *Library Journal* (also available online)
- *Library Resources and Technical Services* (also available online)
- *Libres, library and information science research electronic journal*: http://libres.curtin.edu.au/
- *Serials Librarian, The* (also available online)

- *Serials Review* (also available online)
- *Technical Services Quarterly* (also available online)

Online Sources

- AACR2 ordering site: http://www.aacr2.org/
- AcqWeb: http://www.acqweb.org/
- ACRL Professional Tools: http://www.ala.org/ala/acrl/acrlproftools/professional.cfm
- ACRL Publications: http://www.ala.org/ala/acrl/acrlpubs/publications.cfm
- ALA Products and Publications: http://www.ala.org/ala/productsandpublications/products_and_publications.cfm
- ALCTS Publications: http://www.ala.org/ala/alcts/pubs/publications.cfm
- ALCTS Standards Bibliography: http://www.ala.org/ala/alctscontent/pubsbucket/webpublications/alctsserials/serialsstandards/serialsstandards.cfm
- Cataloger's Desktop: http://desktop.loc.gov/ (requires subscription)
- Cataloger's Learning Workshop. Metadata Basics: http://www.loc.gov/catworkshop/readings/metadatabasics/index.html
- Cataloger's Learning Workshop. Readings in Cataloging and Metadata Education: http://www.loc.gov/catworkshop/readings.html
- CONSER Publication Pattern Initiative: http://www.loc.gov/acq/conser/patthold.html
- CONSER Resources for Serials Catalogers: http://www.loc.gov/acq/conser/resource.html
- CONSER Serials Cataloging Issues: http://www.loc.gov/acq/conser/issues.html#standard-rec
- Dublin Core Metadata Initiative: http://dublincore.org/
- Ebsco: http://www.ebsco.com/home/contact/default.asp (Ebsco.net service requires customer login)
- Library of Congress Classification Outline: http://www.loc.gov/catdir/cpso/lcco/
- Library of Congress MARC21 Format for Bibliographic Data: http://www.loc.gov/marc/bibliographic/
- Library of Congress MARC Standards: http://www.loc.gov/marc/
- Library of Congress Online Catalog: http://catalog.loc.gov/
- LITA Publications: http://www.lita.org/ala/lita/litapublications/litapublications.cfm
- LOCKSS For Librarians: http://www.lockss.org/lockss/For_Librarians
- LOCKSS Publishers and Titles: http://www.lockss.org/lockss/Publishers_and_Titles
- LOCKSS Publications: http://www.lockss.org/lockss/Publications
- LOCKSS Talks: http://www.lockss.org/lockss/TalksMedical Library Association Publications: http://www.mlanet.org/publications/
- NASIG Publications: http://www.nasig.org/publication/index.htm
- NASIG Resources: http://www.nasig.org/resources/index.htm
- NISO: http://www.niso.org/home
- National Library of Medicine: http://www.nlm.nih.gov/
- OAI: http://www.openarchives.org/
- OCLC Bibliographic Formats and Standards: http://www.oclc.org/bibformats/

- OCLC Connexion (Browser): http://www.oclc.org/connexion/
- OCLC Dewey Services: http://www.oclc.org/dewey/
- OCLC Librarian's Toolbox: http://www.oclc.org/toolbox/default.htm
- RDA: http://www.rdaonline.org/
- WorldCat First Search (requires subscription): http://firstsearch.oclc.org
- WorldCat.org: http://www.worldcat.org/

The above lists are by no means comprehensive. Many print and online resources are available elsewhere. To find resources available through a local or regional ALA chapter or association, see http://www.ala.org/ala/ourassociation/chapters/stateandregional/stateregional.cfm.

Choose Discussion Groups

Individuals in serials and library groups also utilize each other's knowledge and expertise and often communicate through electronic discussion groups. Discussion groups may be available with membership in organizations and through any special committees the serialist chooses to join. These groups can be very educational and handy when questions arise or help is needed with a complicated serial. Additionally, many announcements regarding awards and stipends appear on electronic discussion lists, as well as details regarding conferences, meetings and workshops.

Consider the following examples:

- ACQNET-L: http://serials.infomotions.com/acqnet/
- ACRL Discussion Groups: http://www.ala.org/ala/acrl/aboutacrl/acrlcomm/discussiongroups.cfm
- ALA Discussion Groups: http://www.ala.org/ala/ourassociation/discussiongroups/default.cfm
- ALCTS Member Resources: http://www.ala.org/ala/alcts/memberresources/memberresources.cfm
- ALCTS Serials (scroll down to Continuing Resources Section): http://www.ala.org/ala/alcts/sections/serials/default.cfm
- AUTOCAT: http://www.cwu.edu/~dcc/Autocat-ToC-2007.html
- DIGLIB: http://www.ifla.org/II/lists/diglib.htm
- Electronic discussion lists for the user's group(s) of the library's current ILS
- IFLA Activities and Services (scroll down to Discussion Groups): http://www.ifla.org/act-serv.htm#DiscussionGroups
- ILI-L: http://www.ala.org/ala/acrlbucket/is/ilil.cfm
- LIBLICENSE: http://www.library.yale.edu/~llicense/index.shtml
- LITA-L: http://www.lita.org/ala/lita/litamembership/litaldisclists/litalotherdiscussion.cfm
- Libsup-l: http://mailman.u.washington.edu/mailman/listinfo/libsup-l
- Medical Library Association Email Discussion List: http://www.mlanet.org/discussion/index.html
- OCLC/PCC Purl Service Discussion Group: http://www.loc.gov/acq/conser/purl/listserv.htm

- Publib: http://lists.webjunction.org/mailman/listinfo/publib
- RDA-L: http://www.collectionscanada.gc.ca/jsc/rdadiscuss.html
- SERIALST: http://www.uvm.edu/~bmaclenn/serialst.html

Numerous other electronic discussion groups exist. Many groups, committees, organizations, and associations grant list subscriptions automatically with membership. However, membership in library communities draws upon a serialist's time. The serialist should carefully weigh which affiliations and activities, including participation in wikis and blogs, will return the most benefit for the amount of time and cost invested.

Learn from Colleagues and Mentors

Participating in affiliations outside the immediate work environment yields many rewards. Rewards can also be gained from affiliations inside the work environment. Colleagues, specifically those already engaged in serials work, "can help identify valuable sources and teach or explain practices essential to the day-to-day operations of a serials department. Other librarians, whose specialties are in acquisitions, cataloging, preservation, collection development, and public services, might be more than happy to share their experiences, suggest sources for further study, or assist the new serialist in making further professional contacts" (Sill 1999, 249-250).

Beverley Geer, recorded by Heidi Arnold at the 2004 North American Serials Interest Group Annual Conference, indicates that "networking is a critical aspect of working as a serialist and helps preserve the collective knowledge of the profession" (Davis 2005, 24).

Identify New Needs – Repeat as Needed

Collective knowledge becomes vital as the profession advances and new horizons appear. New issues facing serialists include revisions to existing standards such as RDA, FRBR, the arrival of the new CONSER standard record, and the aggregator-neutral record, as well as metadata, electronic resource cataloging, electronic resource management systems, link resolvers, journal bundles, consortiums, federated searching, open URLs, and much more. These developments and their impact, and the need for further education, will seemingly keep serialists constantly in the training mode. The search for new opportunities for training and networking should be a regular part of a serialist's job. All of the resources mentioned in this guide are suitable for research on relevant topics. For additional information see:

- FRBR Blog: http://www.frbr.org/categories/oclc
- Learning 2.0: http://plcmclearning.blogspot.com/
- Learning 2.1: http://exploredisccoverplay.blogspot.com/
- Metadata Reference Guide: http://libraries.mit.edu/guides/subjects/metadata/mappings.html
- OCLC Research Activities: http://www.oclc.org/research/projects/frbr/
- OCLC Separate Records versus Single Record: http://www.oclc.org/support/documentation/worldcat/cataloging/electronicresources/#11
- RDA: http://www.rdaonline.org/

- Rochkind, Jonathan. 2007. (Meta)search Like Google. *Library Journal* 132, no.3: 28-30, http://www.libraryjournal.com/article/CA6413442.html
- Serials Cataloging Issues: http://www.loc.gov/acq/conser/issues.html#standard-rec
- *Understanding FRBR: What it is and How it will Affect Our Retrieval Tools,* by Arlene Taylor (Westport, Conn.: Libraries Unlimited, 2007)

Publish

Serialists who hold tenure-track positions in academic settings can harness their own research on new trends and technologies to fulfill publishing responsibilities, as well as share their own original thoughts and ideas with serials and library communities. For help see:

- ARBA: http://www.arbaonline.com/
- NASIG Guides: http://www.nasig.org/publications/guides/
- NASIG. Resources for Authors: http://www.nasig.org/publications/resources/
- University of Texas at Austin. Peer Reviewed Journals: http://www.lib.utexas.edu/lsl/help/modules/peer.html

Conclusion

Serialists face a myriad of challenges in an ever-evolving environment which at times can seem unsettling, but the circumstance of being "new" holds distinction. The new serialist can bring fresh, innovative ideas and thought to the vocation. Some veterans in the field may find renewed inspiration and zeal when exposed to the energy of the beginner.

When energy lags, the beginner can be reminded of the ground already covered by recognizing that progress is occurring and "that the once seemingly insurmountable list of skill areas is being conquered" (Sill 1999, 253).

Glossary of Terms and Acronyms

AACR2. Anglo-American Cataloging Rules, 2nd edition. (Cataloger's Desktop contains AACR2, 2002 revision with 2005 update)

ACRL. Association of College and Research Libraries

ALA. American Library Association

ALCTS. Association for Library Collections and Technical Services (a division of ALA)

CONSER. Cooperative ONline SERials (a component of PCC)

continuing resource. A bibliographic resource that is issued over time with no predetermined conclusion. Continuing resources include serials and ongoing integrating resources (Joint Steering Committee 2005).

FRBR. Functional Requirements for Bibliographic Records

IFLA. International Federation of Library Associations and Institutions

ILS. Integrated Library System

integrating resource. A bibliographic resource that is added to or changed by means of updates that do not remain discrete and are integrated into the whole. Integrating resources can be finite or continuing. Examples of integrating resources include updating loose-leafs and updating Web sites (Joint Steering Committee 2005).

LC. Library of Congress

LCSH. Library of Congress Subject Headings

listserv. Another name for an electronic discussion list, coming from the popular LISTSERV mailing list management software from L-Soft International, Inc.

LITA. Library Information and Technology Association

LOCKSS. Lots of Copies Keeps Stuff Safe

metadata. In general, "data about data;" functionally, "structured data about data." Metadata includes data associated with either an information system or an information object for purposes of description, administration, legal requirements, technical functionality, use and usage, and preservation. . In the case of Dublin Core, information that expresses the intellectual content, intellectual property and/or instantiation characteristics of an information resource (Dublin Core).

MARC. MAchine-Readable Cataloging, an international standard digital format for the description of bibliographic items developed by the Library of Congress during the 1960s to facilitate the creation and dissemination of computerized cataloging from library to library within the same country and between countries. By 1971, the MARC format had become the national standard for dissemination of bibliographic data and by 1973, an international standard.

There are several versions of MARC in use in the world, the most predominant being MARC 21, created in 1999 as a result of the harmonization of U.S. and Canadian MARC formats; UKMARC, used primarily in the United Kingdom; and UNIMARC, widely used in Europe. The MARC 21 family of standards now includes formats for authority records, holdings records, classification schedules, and community information, in addition to formats for the bibliographic record (OCLC).

NASIG. North American Serials Interest Group

NISO. National Information Standards Organization

OAI. Open Archives Initiative

OCLC. Online Computer Library Center

PCC. Program for Cooperative Cataloging (sponsored by Library of Congress)

RDA. *Resource Description and Access*

SCCTP. Serials Cataloging Cooperative Training Program (a component of CONSER)

serial. A continuing resource issued in a succession of discrete parts, usually bearing numbering, that has no predetermined conclusion. Examples of serials include journals, magazines, electronic journals, continuing directories, annual reports, newspapers, and monographic series (Joint Steering Committee 2005).

serialist. See the discussion in this document under the heading "What is a Serialist?"

updating loose-leaf. An integrating resource that consists of one or more base volumes updated by separate pages that are inserted, removed, and/or substituted (Joint Steering Committee 2005)

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