Creating a New Serials Control Record

You will create a new serials control record to “tell” the system that your library subscribes to a magazine. This serials control record also controls how the record displays in iBistro, and it establishes a prediction record for the magazines.

1) Click on the Create a Serials Control wizard. A search box will pop up. Select the Periodical Title search index, and type in the title of the magazine. You can also search for the ISSN of the magazine by selecting the General search index and typing in the ISSN. Click on the Search button to the right.
2) Select the magazine that you want to attach your issues to. Click on the button that says Create Control.
3) The next box that may come up says “This title is already under serial control.” Click on Create New Control. A box comes up says Create Control: Library for New Control. For library, select your library’s three letter code. For holding code, select your library’s serials holding code. (If you are unable to figure out which is your library’s serials holding code, ask your System Manager.) Click on OK.
4) Select the pattern that most closely matches the magazine’s publication pattern. It might be monthly, bi-monthly, weekly, or another pattern. If there is a pattern that you think should be added, contact the Systems Librarian to add a new one. Click on OK.
5) Fill in the appropriate fields in control record.

a. BASIC: For the most part, you can leave in the defaults that are generated in this field. Note that you MUST have a unique call number in the Base Call Number field. This should consist of an abbreviation of the magazine, plus, if possible, your library’s 3-letter code.

b. PATTERNS: Fill in the appropriate enumeration, chronology, and publication information. Contact the Systems Librarian if you have any questions on how to do this.

c. OPAC DISPLAY – Click on the box that says automatically update MARC holdings. Select the number of most recently received issues that you would like to display. You can select any number but it is recommended that you either select 0 or 2 or 3. Note that it is not the “latest” issue – it is the most recently received issue. Therefore, if you receive the March issue after the April issue, then March will appear as the most recently received issue. Finally, for Form of Name, select “Both” to display.

d. MARC HLDGS – You do not need to do anything with this field.

e. SUBSCRIPTION – Fill in the number of copies of the magazine that your library receives of this magazine. Fill in the number of issues that are expected, and if you know that you will need to renew a subscription on a certain date, you can enter it as well. If you do not know the date, then you can leave the Expiration date as NEVER. If you plan to use serials to claim issues from a vendor, you will enter the information in the Link for Ordering/Claiming area. Contact the Systems Librarian for more answers on how to do that.

f. DISTRIBUTION – This field tells the system how these issues need to be added. Click on the Modify a Distribution helper, and a second box will pop up. If you need to change the Holding Code, you can do so here. Click on the box by Update MARC holdings records. Copies expected should match the number of copies that you entered in step E. For copies to add to catalog, enter the number of copies that want to display in the catalog. You must put a number here if you plan to barcode your magazines for circulation. After you have entered in all of the information, click on Save Changes. The box will disappear, and your changes will display.

g. BINDING – You can ignore this tab.

h. EXTINFO – You can put a note in here if you would like. However, most of the time, you will ignore this tab.

i. EXPECTED – While create a serials control record, this tab will say, No Issues Expected. However, once you create predictions, you will see your predicted issues.

j. ROUTING – If you want serials to create routing information, you can do so at this tab. Ask the Systems Manager for more information. Otherwise, you can ignore this tab.

After you have filled out all of the information in these tabs, click on the button that says Create Control. You will now need to fill out your Prediction Records.
Creating Predictions for a Magazine

After you have created the serials control record, you need to create the predictions. This tells the system the dates of each issue.

1. Enter the number of issues that you wish to predict. I recommend that you predict at least one more issue than the total number of issues per year. If you have a monthly magazine that has 12 issues, you would predict 13. If you have a bimonthly magazine with 6 issues, then you would predict 7.
2. Enter the volume and number that you wish to start with. This does not have to be volume 1, number 1. If you have started getting the magazine with volume 10 number 3, that would be what you would enter.
3. Enter the chronology in the format that matches the chronology in the serials control record.
4. For Date first prediction, click on the gadget by the field to enter the date of the magazine. If this is a monthly that has no exact date, then you can select the first day of the month.
5. For date expected, enter the date that you expect to receive the issue. If you know which date the magazine usually arrives, you can select that. Otherwise, just select a date ten days after the magazine is published. For example, if the magazine is published on August 14, 2006, enter the date expected as August 24, 2006.
6. Click on OK. You will now see a new screen with all of the prediction information. If it looks correct, you can click on Save Prediction. If you want to make a change, click on Redo Prediction, and you can follow steps 1-5 again to make any necessary changes.
Checking in a Serial in SIRSI

1. Click on the Check In Issues of a Serial wizard.
2. Search for and select the magazine.
3. You will see a box come up with several tabs. The tab that will be displayed is Next Issue. You will see Enumeration and chronology of the issue. If this is the correct issue, click on Check In Now. You will be prompted to enter your library’s barcode. Hit enter.