



Traverse des Sioux Library System

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Serial Control Procedures for Magazines with Irregular Publication Patterns

Creating a Serials Control record

In the Serial Controls toolbar:

- Click: Create a Serial Control
- Create Control: Set Properties screen:
 - Set Serials Control properties if necessary. (See: Creating a Serial Control Record for directions)

Create a Serial Control:

Click: Create a new Serial Control

- Create Control: Library for new control screen (if not set in Properties): **XXX**
- Create Control: Library holding code: **XXXP**
- Create control: Creating a Control screen:
 - Under Basic tab:
 - Enter serial and vendor information as necessary
 - Base Call number: **Periodicals**
 - Class scheme: **LCPER**
 - Under Patterns tab:
 - Check: V. if there is a volume number
 - Check: no. if there is an issue number
 - Limit: The actual number of magazines that will be received in a publication cycle or period
 - Publication pattern: Check: Allow automatic prediction of issues
 - Click the Replace Patterns Helper above the tabs on the left side of the screen to open Publication Cycle screen
 - Choose a pattern that **equals or over-predicts** the frequency of the magazine
 - Example: Family Circle (15 issues) or Woman's Day (17 issues): Choose: Semimonth (two issues per month)—the system-generated dates will be the 1st and 15th of each month
 - Example: Health (10 issues with combined JAN/FEB & JUL/AUG): Choose Annual (one issue per month)
 - Replace pattern.
 - Chronology Type: system-set to match the Publication Cycle chosen with the Replace Patterns Helper. (For Family Circle or Woman's Day: "Date." For Health: "Monthly.")
 - Click on gadget to the right of Publication Cycle to open Publication Cycle screen
 - Click: Omit Issues Helper in the upper left corner of screen
 - Delete issues in the months that will receive only one issue.

- Click on the month and day of issues that will not be received
 - Example: Family Circle, delete: JAN 15, FEB 15, MAR 15, MAY 15, JUN 15, JUL 15, AUG 15, SEP 15, DEC 15
 - Example: Health, delete: FEB, AUG
 - OK
 - OK
 - Set number of claiming days as necessary or use system defaults
- Under OPAC tab:
 - Do not check Automatically update MARC holdings
 - Number to display: 0
 - Form of display: Both
- Under MARC Holdings tab:
 - Ignore tab
- Distribution tag:
 - Distribution: Holding code: Code of the library: XXXP
 - Number of copies expected and to be distributed (Usually 1 copy)
 - Update MARC holdings: N
 - Edit Distribution with the Helper button if necessary
 - Click: Create control button
- Create Control: Get Expected issue information screen
 - Preview: The number of issues to preview (usually number of issues to be received in a year or a year plus one issue)
 - Volume: The volume number of issue in hand
 - No.: The number of the issue in hand
 - Chronology: Date on issue in hand (three characters for month and four characters for year, but must follow the pattern chosen above).
 - Exp: JAN 1, 2006 or JAN 2006
 - Date of first prediction: Date given on issue in hand
 - Date expected: Date magazine usually arrives in the library
 - Generate predictions button: Predictions generated.
 - Scroll down to verify that dates and enumeration of future volumes and number of issues falls correctly within the time period you have chosen (i.e., If 10 issues are expected in a year, then the numbers should be numerically correct. Exp. Vol. 20 no. 1 through Vol. 20 no. 10)
 - If correct: Save predictions button
 - If not correct: Redo predictions button, then make corrections to prediction and regenerate the predictions to get the correct number of issues in a year or time period that is as close as possible to actual issue dates.
 - OK
 - OK

Modifying dates in Serial Control records: Two methods

Method 1: If the actual dates of the expected issues are known at this time, modify the expected issue dates immediately to reflect the exact date of each expected issue.

In the Create Serials Control wizard: Expected issues tab:

- Highlight the issue with a date or other information that needs to be modified
- Click on the Modify an Issue Helper at the upper left corner of the Expected tab.
- In Create a Serial Control: Modifying Prediction Information
 - Highlight the line with the information to be modified

- Correct the Enumeration, Chronology, Dates expected/predicted, Number of issues expected, etc. as necessary
 - Example 1: Family Circle predicted date: DEC 15, 2005 will actually be dated DEC 18, 2005
 - Example 2: Health: JAN 2006 will actually be a combined issue dated JAN/FEB 2006
- Click: Modify issue button (Continue modifying the dates, etc. as necessary)
- Click: Modify issue button after each line modification
- Click: Modify Control button when all modifications have been finished

Method 2: If the number of issues to be received is known, but the actual dates of the expected issues are not known at this time, the modification of the date can be done when the issue is checked in.

In Serials Check In wizard:

- In: Check in issues of a serial:
- Set properties screen if necessary (right click on Check in wizard; arrow down to Preferences):
 - Set search properties, library code, etc. as necessary
 - Click: OK
- Check in: Select search: Search for the serial in hand
- If the date on the issue in hand is not the date given in the Expected Issue tab screen:
 - Click: Different issue button
 - Highlight the issue that has the incorrect date for this month
 - Click: Modify issue
 - On the Modifying prediction information screen:
 - Type in appropriate changes to match date on the issue in hand
 - Example: Family Circle: SEP 1, 2006 issue is actually dated SEP 5, 2006
 - Example: Health: JUL 2006 is a combined issue, JUL/AUG 2006
 - Click: Modify issue button
 - On the Receiving a Predicted Issue screen:
 - Click: Check in button
 - Enter the barcode number on the Update copy list
 - OK
 - OK