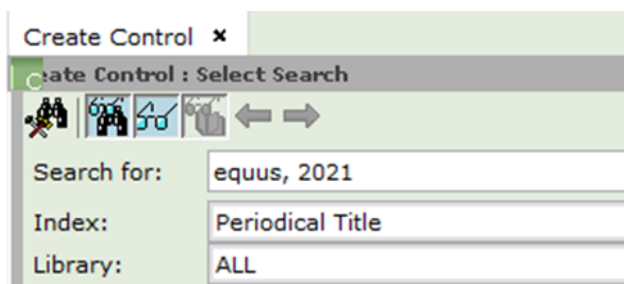


# 2021 Instructions for Duplicating Serial Control Records

Creating a Control Record for your magazine is done annually or when you start receiving a new subscription. Control Records allow patrons to be able to place issue specific holds in the online catalog. To create Control Records for your 2021 magazines please follow the steps below.

## Step One-

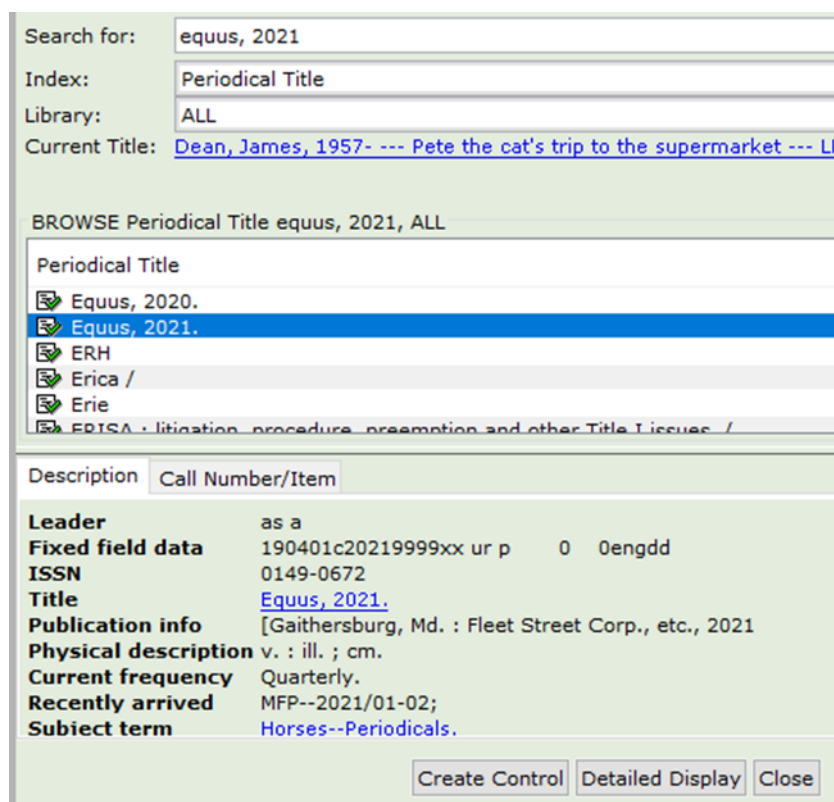
1. Open the Serials Module.
2. Open the **Create Control Wizard** located in the **Serials Module**.
3. Perform a search for your periodical title. **All magazine titles that are specified for Serial Control by SEO are followed by the current year. Ex. Equus 2021**



The screenshot shows a window titled "Create Control" with a sub-header "Create Control : Select Search". Below the header are navigation icons. The search criteria are as follows:

Search for:	equus, 2021
Index:	Periodical Title
Library:	ALL

4. Select your periodical title and click the **Create Control** button located at the bottom of the page.



The screenshot displays the search results and details for the selected record. The search criteria are repeated at the top:

Search for:	equus, 2021
Index:	Periodical Title
Library:	ALL

The "Current Title" is: [Dean, James, 1957- --- Pete the cat's trip to the supermarket --- L...](#)

BROWSE Periodical Title equus, 2021, ALL

Periodical Title
<input type="checkbox"/> Equus, 2020.
<input checked="" type="checkbox"/> Equus, 2021.
<input type="checkbox"/> ERH
<input type="checkbox"/> Erica /
<input type="checkbox"/> Erie
<input type="checkbox"/> ERISA : litigation, procedure, preemption and other Title Issues /

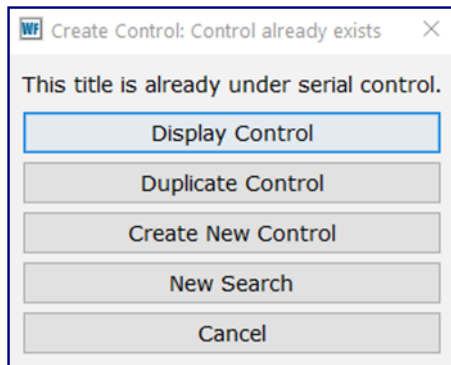
Below the list is a detailed record view for "Equus, 2021":

Description	Call Number/Item
<b>Leader</b>	as a
<b>Fixed field data</b>	190401c20219999xx ur p 0 0engdd
<b>ISSN</b>	0149-0672
<b>Title</b>	<a href="#">Equus, 2021.</a>
<b>Publication info</b>	[Gaithersburg, Md. : Fleet Street Corp., etc., 2021
<b>Physical description</b>	v. : ill. ; cm.
<b>Current frequency</b>	Quarterly.
<b>Recently arrived</b>	MFP--2021/01-02;
<b>Subject term</b>	<a href="#">Horses--Periodicals.</a>

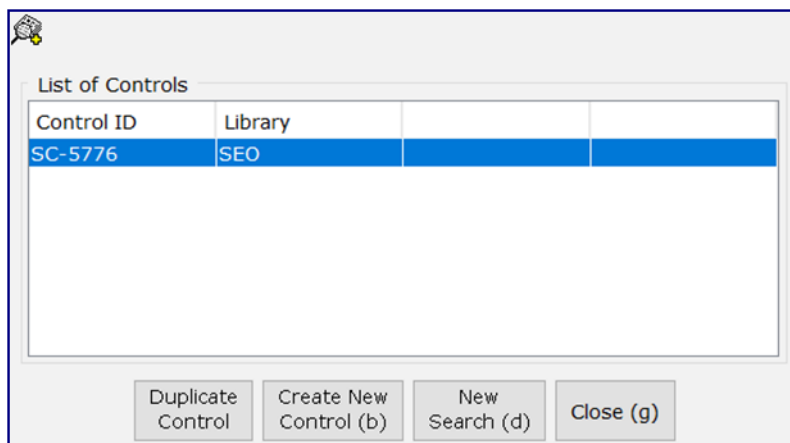
At the bottom of the record view are three buttons: "Create Control", "Detailed Display", and "Close".

# 2021 Instructions for Duplicating Serial Control Records

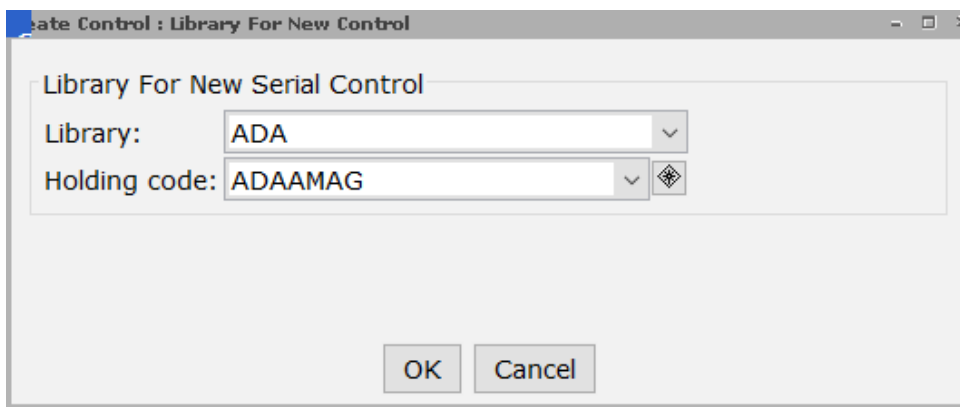
- In the dialog box that opens, select **Display Control**.



- In the window that opens, you will see the 3-letter code for the libraries that already have a control record created. **Highlight SEO's control record.**



- Select **Duplicate Control**.
- In the next dialog box, **change the codes to YOUR library's 3 letter code AND holding code.**



- Click OK. The next screen will default to the Basic tab.

# 2021 Instructions for Duplicating Serial Control Records

## Step Two-

1. **Basic tab.** Check this tab for the following:

Base call number = **MAG**

Class scheme = **DEWEYPER**

Status = **ACTIVE**

The screenshot shows the 'Basic' tab of a library system interface. The tabs at the top are: Basic, Patterns, OPAC Display, MARC Holdings, Subscription, Distribution, Binding, Extended Info, and Expected. The 'Basic' tab is active. The form contains the following fields:

New control ID:	AUTO	Status:	ACTIVE
SISAC ID:	0149-0672	Category1:	
Vendor title#:		Category2:	
Base call number:	MAG	Date created:	9/21/2020
Class scheme:	DEWEYPER		
Subscription ID:			

2. **Patterns tab.**

Chronology = **NUMERATION**

Allow automatic prediction of issues must be **UNCHECKED**

The screenshot shows the 'Patterns' tab of a library system interface. The form contains the following fields:

Chronology pattern  
Chronology type: NUMERATION

Publication pattern  
 Allow automatic prediction of issues

Publication cycle: [text box]

Days to wait before claiming: 0

Days before subsequent claim: 0

3. Select **Create Control**.

The screenshot shows the bottom buttons of a library system interface. The buttons are: Create Control, Return to Search, New Search (b), and Cancel.

4. **If your library subscribes to multiple copies of a magazine, proceed to Step Three.**

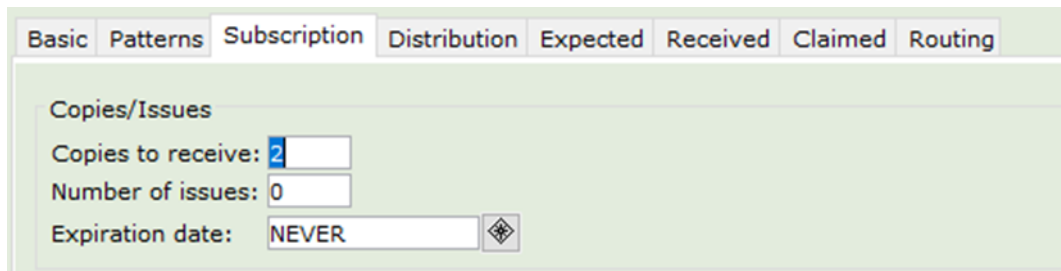
# 2021 Instructions for Duplicating Serial Control Records

## Step Three-

### 1. **Subscription tab.**

**Copies to receive** is equal the number of subscriptions you have for this title.

If your library has more than one subscription for a title, you can modify the Copies to receive.




Basic Patterns **Subscription** Distribution Expected Received Claimed Routing

Copies/Issues

Copies to receive:

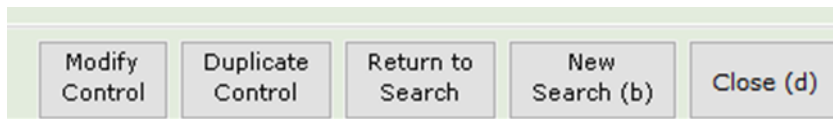
Number of issues:

Expiration date:  

If you process magazines for multiple branches, you can modify the Copies to receive and create multiple distributions in the Distribution Tab. Or, you can create a separate control record for each branch.

**Because we will NOT be using Prediction Patterns, you DO NOT have to insert the Number of Issues.**

After updating copies to receive, **select Modify Control.**

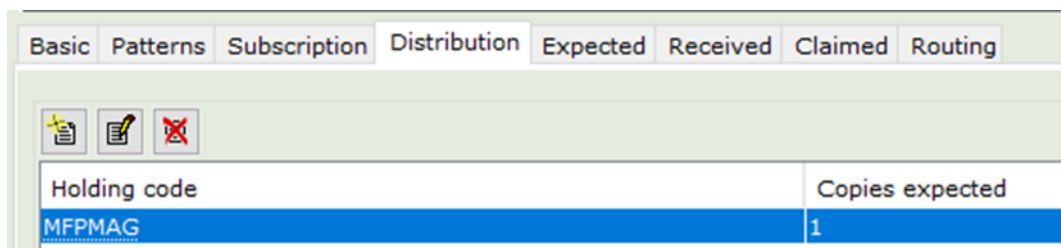


Modify Control Duplicate Control Return to Search New Search (b) Close (d)




### 2. **Distribution tab.**

If you process magazines for multiple branches, you will need to set up distributions after updating number of copies.

Select the **Create Distribution helper.**



Basic Patterns Subscription **Distribution** Expected Received Claimed Routing

Holding code	Copies expected
MFPMAG	1

# 2021 Instructions for Duplicating Serial Control Records

Update the **Holding code** to for the additional locations.

Update **Copies expected** to the number of copies that library will receive.

Receiving 2 copies  
1 copies distributed  
1 copies not distributed

Distribution Information

Holding code:   Update MARC holdings records

Copies expected:  Copies to add to catalog:




Distribution Information

Holding code	Copies expected	Copies to add to catalog	Update holdings
MFPMAG	1	1	N

Select **Create Distribution**.

Repeat this process until all copies have been assigned to the proper location.

Basic Patterns Subscription **Distribution** Expected Received Claimed Routing

Holding code	Copies expected
MFPMAG	1
MBRMAG	1