Serial Controls for Electronic Resources

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Note: As of the migration to Alma (8/1/2019), serial control records are no longer used.

Introduction. Most serial controls are created and modified by Acquisitions, but in some cases these tasks are done in Cataloging:

- Input serial controls for certain ongoing packages, for which notification is received directly from the publisher or publisher's website, rather than from the Electronic Resources staff. These include: JSTOR, Project MUSE, and DigiZeitschriften.
- Input serial controls for free online titles which are not associated with any order records. These are usually generated by requests from Collection Development librarians.
- Change the status on controls for cancelled or ceased electronic resources to reflect whether they still have backfiles available

General Procedures and Codes:

- Create controls for all electronic resources with an ongoing subscription. Firm ordered materials with no ongoing maintenance fees do not require a serial control record.
- Also create controls for firm-ordered titles that have an ongoing maintenance fee. For these, use the PO number for the maintenance fee order and either EMAINT or EREFMAINT
- Use FREE-ETEXT for resources that are totally free online, or that come free with another title or membership package
- Use PAID-ETEXT for titles or packages that have paid orders, and also for titles come with print for which we pay extra for the online.
- ARCHIVED is used for titles for which we no longer have a current subscription, but for which we still have access to a portion of the back issues. Use for:
  - titles where the publisher changes, but we still have backfiles through the original publisher
  - titles which were cancelled, but for which we still have access to backfiles
  - titles that cease, or which have already ceased when we first add them, but for which we have access to backfiles
  - archival packages like JSTOR or DigiZeitschriften, which include titles that are already ceased but for which backfiles are still being ordered
- CANCELLED is used for titles which are cancelled and for which we no longer have any access.
- CEASED is for titles that cease which are not continued by another title and for which we no longer have access.
- MERGED is used for titles which we currently subscribe to which cease and are continued by another title (title changes, mergers, splits, etc.). Mark the control for the old title MERGED and the control for the new title ACTIVE.
- For titles that have one or more titles changes already when we first add them, do not create controls for any of the earlier titles, but only for the latest title.
- For free titles online suggested by Collection Development, include the selector's initials and date the title was requested in the EXTINFO note field

Creating Serial Controls in Sirsi:

1. Open the "Create Serial Control" wizard

2. Use the search screen to search for the desired control (or select link for current record).

3. Set the following defaults for these items (note: these can be pre-set under Properties):
   Library: FONDREN
   Holding code: FOND-SER
4. When the "Create Control" screens come up, under the BASIC tab, fill in:

   New **Control ID**: <first 4 letters of first two major words, plus: hyphen "e"
   example: AMER HIST-E (for "American History")

   Status: ACTIVE (usually)

   Category1: <info. will be given in email or on list; will be one of following:

     PAID-ETEXT
     FREE-ETEXT
     PAID-ESUB
     FREE-ESUB
    ARCHIVED
    EMAINT
    EREFMAINT
    ESTAND (seldom used)

5. Under the **SUBSCRIPTION** tab, fill in:

        Fiscal cycle: <number of current fiscal year>

        Vendor ID: <should be given in email, attached to bib record, or in PO for print version; for free titles, use GIFT>
6. Under the **EXTINFO** tab, fill in notes re: source of access:

   Note: See PO-xxxxx [use for PAID-ETEXT or free with print]
   Note: Free [use for totally free or open-access titles] per [initials of Collection Development librarian who requested it], <date>

For cancelled or ceased titles, you can add a note re: continued access:

Note: ca <date>; continued access to backfiles
Note: ca <date>; no access to backfiles

7. When finished, press the **Create Control** button at the bottom left.