URLs (856s)

Serials: Cleanup After Migration to 6.8

Posted to web Aug 13, 2002

Before you start:
- open telnet, Notepad, GeoWeb
- test URL in GeoWeb and verify holdings

Single 856 – Single INTERNET or NETWRK copyset

Migration to 6.8 creates a WWW copyset in addition to the INTERNET or NETWRK copyset. The 856 tag is in the WWW copyset.

1. Select "Holdings edit"
2. Select "Locations display"
3. Select the WWW location copy record
4. Select "MARC Holdings"
5. Copy the URL into Notepad
6. Exit
7. Exit
8. Select the INTERNET or NETWRK location copy record
9. Select "Holdings statement"
10. Select the type of holdings record
11. If there is an access restrictions note and corresponding URL, copy these into Notepad
12. Select Line 2: Textual statement
13. Update the summary holdings statement if necessary, then move the cursor to the end of the summary holdings statement and press Enter (this will delete the access restrictions note and the URL)
14. Accept
15. Accept
16. Select "MARC holdings"
17. Insert an 856 tag and paste the URL (for the serial) and any other subfields ($z Access restricted note) from Notepad
18. Accept
19. File
20. Select "Delete item(s)", then type the number of the WWW location copy record
21. Delete it (Y/N) Y
22. Test the URL in GeoWeb

Multiple 856s – Multiple NETWRK copysets
Migration to 6.8 creates a WWW copyset in addition to the INTERNET or NETWRK copysets. All of the 856s are in the single WWW copyset.

1. Select "Holdings edit"
2. Select "Locations display"
3. Select the WWW location copy record
4. Select "MARC Holdings"
5. Copy your entire 856 into Notepad, then exit from the WWW location copy record
6. Select the appropriate NETWRK location copy record
7. Select "MARC holdings"
8. Insert an 856 tag
9. Copy and paste the 856 subfields ($u URL and $z Access restricted note) from Notepad.
10. Accept
11. File
12. Test URL to ensure that it works and to verify holdings
13. Select the WWW location copy
14. Select "MARC holdings"
15. If yours is the only location associated with the 856, delete the 856, then Accept and File.
16. If you have dealt with the last remaining 856, (Check to see if all institutions listed in the Access restricted note have added an appropriate Location Copy and 856 in MARC Holdings) exit to the Location Copy Detail, then select Delete to delete the WWW Location Copy record.

Serials: Adding 856s in 6.8

Adding an INTERNET or NETWRK copyset
1. Select "Holdings edit"
2. If this will be the first copyset, select "Multipart/serial"

Creating the location copy record and entering the URL:
3. Select "Locations display"
4. Select "Add item"
5. Enter institution, sublocation, collection code (INTERNET, INTERNET or your location + NETWRK), call number information, e.g., (Springer LINK)
6. Select "MARC holdings"
7. Add the 856 tag including the $z Access restricted note.
8. Accept
9. File

Creating the copyset:
10 Select "Go to"
11. Select "Serial copy display"
12. Select "Add item"
13. Line 1: Location: ??
14. "Retrieve" the appropriate Location Copy record
15. Line 2: Status: leave as "N" for inactive
16. Line 6: Ship to: enter the appropriate ship to code (?? to browse the list)
17. File
18. WARNING - No Type of Holding records linked to this copy set. The copy set cannot be checked in without Type of Holding records. Press Enter.
19. Record is filed - Any further updates ? (Y/N) N

Creating the type of holdings record:
20. Select "Go to"
21. Select "Type of holdings display"
22. Select "Add item"
23. Line 1: Description: describe the type of holding (e.g., Library has)
24. File
NOTE: If the TOH has been added correctly, the wording "Captions/Labels" (i.e., v. no.) will not appear next to "ISS", "Library has", etc.

Creating the publication pattern:
25. Select "Go to"
26. Select "Publication pattern display"
27. Select "Add item"
NOTE: Never select an "ISS" Publication Pattern with Enumeration/Chronology (if it already exists). This may be a valid "Active" pattern for Checkin of Serials. Consult your appropriate staff for clarification.
28. Select the appropriate type of holdings record: TOH with no "Captions/Labels" (v. no.)
29. Enter ( ) as the caption/label for enumeration
30. Line 7: Regularity pattern: enter a space
31. File
32. Is this publication pattern going to be used to predict issues? N
33. Can holdings data for this publication pattern be compressed? N
NOTE: NEVER OVERWRITE/REPLACE AN "ISS" PUBLICATION PATTERN which contains Captions/Labels in the Enumeration field (line 1) of the pattern. If there is enumeration containing a caption/label (i.e., v. no.) on the "ISS" pattern you have chosen, you are most likely linking to an "ACTIVE" pattern for checkin. Please DO NOT CONTINUE. ADD a new "ISS" pattern (never revise a pre-existing pattern in order to add an internet or network copyset.)

Creating the part:

34. Select "Go to"
35. Select "Parts display"
36. Select "Insert at line #", then type 1
37. Line 1: Type of Holding: ??
38. "Retrieve" the type of holding record
39. Line 3: enter a dash as the enumeration
40. File
41. Accept
42. File

Creating the piece:
43. Select "Go to"
44. Select "Pieces display"
45. Select "Add item"
46. Line 1: Barcode: press Enter
47. Line 2: Current Location: Type ??
48. Select appropriate Location Copy
49. Line 4: Volume/Part#: ??
50. Link
51. "Retrieve" the part
52. Accept
53. Line 7: Circ. Code: enter a dash
54. File
55. Update owning information from current info (Y/N) ? Y

Creating a summary holdings statement:
56. Select "Go To"
57. Select "Locations display"
58. Select the location copy summary
59. Select "Holdings statement"
60. Select the type of holdings record
61. Line 1: Type: enter 1 for Manual Override
62. Line 2: Textual Statement: enter summary holdings statement
63. Accept
64. Accept
65. File

Monographs: Cleanup After Migration to 6.8

Single 856 – no INTERNET or NETWRK piece
Migration to 6.8 creates a WWW location copy record (Institution = WWW, Sublocation = WWW). The 856 tag is included in the WWW location copy record.

Cleanup in 6.8:
1. Select "Holdings edit"
2. Select "Locations display"
3. Select the WWW WWW location copy record
4. Change the Institution and Sublocation to Internet
5. Test the URL in GeoWeb. If the URL needs to be changed, select "MARC holdings"
6. Update the 856 tag.
7. Accept
8. File
9. Exit
10. If the URL has been changed, test it in GeoWeb.

Single 856 – INTERNET piece
Migration to 6.8 creates an INTERNET location copy record and a WWW location copy record (Institution = WWW, Sublocation = WWW). The 856 tag is included in the WWW location copy record.

Cleanup in 6.8:
1. Select "Holdings edit"
2. Select "Locations display"
3. Delete the INTERNET location copy record
4. Warning message: : location copy has pieces/parts attached. Press Enter
5. 1 of 1 can be deleted. Delete it (Y/N)? Y
6. Select the WWW WWW location copy record
7. Change the Institution and Sublocation to Internet
8. Test the URL in GeoWeb. If the URL needs to be changed, select "MARC holdings"
9. Update the 856 tag.
10. Accept
11. File
12. Exit
13. If the URL has been changed, test it in GeoWeb.

Single 856 – Single NETWRK piece
Special fix by Geac: A NETWRK location copy record will be created. The 856 tag will be entered in the NETWRK location copy record.

Cleanup in 6.8:

None unless access restriction information was entered in the NETWRK piece (possible display issues in telnet or GeoWeb)

<u>Multiple 856s – Multiple NETWRK pieces (only affects DalTech?)</u>
Part of special fix by Geac: A WWW location copy record (Institution = WWW, Sublocation = WWW) will be created. All 856 tags will be entered in this location copy record. Contents of the NETWRK piece records will be loaded into separate 858 fields of bib record.

Cleanup in 6.8:
Create a location copy record for each 858 and copy the appropriate URL from the WWW location copy record. When finished, delete the WWW location copy record.

Geac will supply a list of monographic records with multiple 856s. DalTech will provide detailed instructions for cleanup if other libraries are affected (this will be top priority for cleanup).

Monographs: Adding 856s in 6.8

SINGLE-PART HOLDINGS

1. Select "Holdings Edit"
2. Select "Single-part" (adding first piece) or "Pieces display" (other pieces already attached)
3. Select "Add Item"
4. Line 1: Barcode – press Enter
5. Line 2: Current location – type C
6. Enter Institution, Sublocation, and Collection Code if applicable
7. If applicable, enter source in call number field
8. First piece only: Line 3: Owning location – type C, then enter Institution, Sublocation
9. Line 5: Circulation Code – type a dash
10. File
11. Update owning info from current info (Y/N)? Y
12. Select "Go to"
13. Select "Locations display"
14. Select appropriate location copy record
15. Select "MARC holdings"
16. Add 856 tag including access restriction note, if applicable.
17. Accept
18. File

Multi-Part Monographic Holdings

1. Select "Holdings Edit"
2. Select "Multipart/Serial"
3. Select "Publication Pattern Display"
4. Select "Add Item" [Add a Publication Pattern record]
5. Select "Add Item" [Add the Type of Holding to the Publication Pattern record]
6. Describe the Type of Holding on line 1, e.g.: Volumes, Indexes or Supplements
7. File [Return to the Publication Pattern Detail record]
8. Enter the Volume caption(s) on line 1, e.g., v. pt. (unit)
9. Enter a blank space on line 7 (Regularity Pattern)
10. If there is the possibility that any of the levels may be lacking on some Volumes, go to the [Second Screen] and type 3 in line 6 (Caption Evaluation) and [Accept]
11. [File]
12. Predict issues? N
13. Compress? Y for single-level, consecutive volumes ; N for multi-level or non-consecutive volumes
14. Select "Go To"
15. Select "Pieces Display" [Go to the Pieces Summary screen]
16. Select "Add Item" [Add a Pieces record]
17. Enter the Barcode on line 1
18. From line 2 (Current Location), open the editing window [C] (Use ?? when there are additional Location Copies)
19. Edit the Current Location subfields
20. File
21. From line 3 (Owning Location), open the editing window [C]
22. Edit the Owning Location subfields
23. From line 4 (Volume/Part #), open a linking window [??]
24. Select Link [to the established Publication Pattern]
25. Highlight "Insert at line #" and type the number "1" [Establish the Part enumeration]
26. From line 1, choose the Type of Holding record [??]
27. Select "Retrieve #"
28. Enter numbering for the part on line 3, e.g., v.: 1 pt. A
29. [File]
30. Select "Accept" [Verify the link to the Part]
31. Complete the Pieces record: Line 5 (Circ. Code) Type a dash
32. [File]
33. Update owning information? Y
34. Select "Go To"
35. Select "Locations Display"
36. Select appropriate location copy record
37. Select "MARC holdings"
38. Add 856 tag and access restricted note, if applicable
39. Accept

40. File