

Serials (Retrospective Cataloguing)

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Adding the First Copyset to a Serial Record

Creating the location copy record:

1. Select "Holdings Edit" [To go to the Holdings module]
2. Select "Multipart/serial"
3. Select "Locations display"
4. Select "Add item"
5. Enter institution, sublocation, collection code, call no., etc.
6. File

Creating the copyset:

7. Select "Go to"
8. Select "Serial copy display"
9. Select "Add item"
10. Line 1: Location: ??
11. "Retrieve" the location copy record
12. Line 2: Status: leave as "N" for inactive
13. Line 6: Ship to: enter the appropriate ship to code (?? to browse the list)
14. File
15. 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.
16. Record is filed - Any further updates ? (Y/N) N

Creating the type of holdings record:

17. Select "Go to"
18. Select "Type of holdings display"
19. Select "Add item"
20. Line 1: Description: describe the type of holding (e.g., Volumes, Indexes, Supplements)
21. File

Creating the publication pattern:

22. Select "Go to"
23. Select "Publication pattern display"
24. Select "Add item"
25. Enter caption/label for enumeration and/or chronology
26. Line 7: Regularity pattern: enter a space
27. If there is the possibility that any of the levels may be lacking on some Volumes, select Second screen, then type 3 in Line 6: Caption Evaluation, then Accept.
28. File
29. Is this publication pattern going to be used to predict issues? N
30. Can holdings data for this publication pattern be compressed? N

Creating the part:

31. Select "Go to"
32. Select "Parts display"
33. Select "Insert at line #", then type 1
34. Line 1: Type of Holding: ??
35. "Retrieve" the type of holding record
36. Line 3: enter the enumeration/chronology for the volume in hand
37. File
38. Accept
39. File

Creating the piece:

40. Select "Go to"
41. Select "Pieces display"
42. Select "Add item"
43. Line 1: Barcode: enter a barcode number or press Enter for a system generated Nbarcode
44. Line 3: Owning location: type C
45. Enter Institution, Sublocation
46. Line 4: Volume/Part#: ??
47. Link
48. "Retrieve" the part
49. Accept
50. Complete the piece record (circ code, etc.)
51. File
52. Update owning information from current info (Y/N) ? Y

Creating a summary holdings statement:

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

Adding Additional Volumes to the First Copyset

1. Select "Holdings Edit" [To go to the Holdings module]
2. Select "Pieces display"
3. Select "Add item"

4. Line 1: Barcode: enter a barcode number or press Enter for a system generated Nbarcode.
5. Line 4: Volume/Part #: ??
6. Link
7. Select "Insert at line #", then type the number of the line the piece should go after
8. Line 3: enter the enumeration/chronology for the volume in hand
9. File
10. Accept
11. Complete the piece record (e.g. circ. code, etc.)
12. File
13. Update owning info from current info (Y/N) ? Y
14. Select "Go to"
15. Select "Locations display"
16. Retrieve the appropriate location copy record
17. Select "Holdings statement"
18. Retrieve the type of holdings record
19. Update Line 2: Textual Statement
20. Accept
21. Accept
22. File

Adding a New Copyset to a Serial Record (Other Copysets Attached)

Note: covers both existing and new volumes

Creating the location copy record:

1. Select "Holdings Edit" [To go to the Holdings module]
2. Select "Locations display"
3. Select "Add item"
4. Enter institution, sublocation, collection code, call no., etc.
5. File

Creating the copyset:

6. Select "Go to"
7. Select "Serial copy display"
8. Select "Add item"
9. Line 1: Location: ??
10. "Retrieve" the appropriate location copy record
11. Line 2: Status: leave as "N" for inactive
12. Line 6: Ship to: enter the appropriate ship to code (?? to browse the list)
13. File
14. 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.
15. Record is filed - Any further updates ? (Y/N) N

Creating the piece and linking it to the part:

16. Select "Go to"
17. Select "Pieces display"
18. Select "Add item"
19. Line 1: Barcode: enter a barcode number or press Enter for a system generated Nbarcode
20. Line 2: Current location: ??
21. Select the appropriate location copy record
22. Line 3: Owing location: type C
23. Enter Institution, Sublocation
24. Line 4: Volume/Part#: ??
25. Link
26. If the appropriate part is already in the list, "Retrieve" the part, then go to step 28 (i.e., Accept)
27. If the appropriate part isn't in the list, select "Insert at line #", then type the number of the line that the part should go after.
28. Line 3: enter the enumeration/chronology for the volume in hand.
29. File
30. Accept
31. Complete the piece record (circ code, etc.)
32. File
33. Update owing information from current info (Y/N) ? Y

Creating a summary holdings statement:

34. Select "Go To"
35. Select "Locations display"
36. Select the location copy summary
37. Select "Holdings statement"
38. Select the type of holdings record
39. Line 1: Type: enter 1 for Manual Override
40. Line 2: Textual Statement: enter summary holdings statement
41. Accept
42. Accept
43. File

Adding additional volumes when there are multiple copysets

Note: covers both existing and new volumes

1. Select "Holdings Edit"
2. Select "Pieces display"
3. Select "Add item"
4. Line 1: Barcode: enter a barcode number or press Enter for a system generated Nbarcode.
5. Line 2: Current location: ??
6. Select the appropriate location copy record.

7. Line 4: Volume/Part #: ??
8. Link
9. If the appropriate part is already in the list, "Retrieve" the part, then go to step 14 (i.e., Accept)
10. If the appropriate part isn't in the list, select "Insert at line #", then type the number of the line that the part should go after.
11. Select "Insert at line #", then type the number of the line the piece should go after
12. Line 3: enter the enumeration/chronology for the volume in hand
13. File
14. Accept
15. Complete the piece record (e.g. circ. code, etc.)
16. File
17. Update owning info from current info (Y/N) ? Y
18. Select "Go to"
19. Select "Locations display"
20. Retrieve the appropriate location copy record
21. Select "Holdings statement"
22. Retrieve the type of holdings record
23. Update Line 2: Textual Statement
24. Accept
25. Accept
26. File

Editing Summary Holdings Statement

1. Select "Holdings edit"
2. Select "Locations display"
3. Retrieve the appropriate location copy record
4. Select "Holdings statement"
5. Retrieve the type of holdings record
6. Update Line 2: Textual Statement
7. Accept
8. Accept
9. File

Changing the Location of a Copyset

Note: this changes the location of the copyset and all of the pieces attached

1. Select "Holdings edit"
2. Select "Locations display"
3. Select the appropriate location copy record
4. Change the location (institution, sublocation, collection code)
5. Update owning info from current info for attached PIECES (Y/N) ?Y

6. If the circulation code or status of the individual volumes needs to be changed, select “Go to”, then select “Pieces display”, then select and edit each of the pieces

Changing the Location of One or More Pieces

Note: This can also be done by changing the location of the individual pieces, however, this method is not recommended because you can easily change the location of all pieces by mistake.

1. Select “Holdings Edit”
2. Select “Locations display”
3. Select the location copy that the piece will be moved from
4. Select “Pieces/Parts”
5. Select “Move”, then enter the number(s) of the pieces to be moved.
6. Move to new Bibliographic record (B) or to new Location (L)? L
7. Move it/them? Y
8. Select the location copy that the piece will be moved to
9. Update owning info from current info for attached PIECES (Y/N) ? Y
10. Exit
11. Exit
12. Update the appropriate summary holdings statements (for details, see Editing Summary Holdings Statement)
13. If the circulation code or status of the individual volumes needs to be changed, select “Go to”, then select “Pieces Display”, then select and edit each of the pieces.

Changing the Call Number of a Copyset

Note: since the call number is stored in the location copy record this changes the call number that is displayed for all of the pieces attached to the copyset

1. Select “Holdings edit”
2. Select “Locations display”
3. Select the appropriate location copy record
4. Edit the call number
5. Update owning info from current info for attached PIECES (Y/N) ?Y

Changes to Individual Pieces: replacing barcodes, changing the circulation code, changing the status

1. Select “Holdings edit”
2. Select “Pieces display”
3. Select the appropriate piece
4. From here you can replace the barcode, change the circulation code, or change the status.

Deleting a Copyset

1. Select "Holdings edit"
2. Select "Locations display"
3. Select "Delete item(s)", then type the number of the location copy you want to delete
4. Warning message: "Location Copy at Line (e.g.) 1 is attached to Copy set record(s)"
Press Enter
5. Message: "Okay to delete active copysets?- Y"
6. Warning message: "Location Copy at Line (e.g.) 1 has pieces/parts attached" Press Enter
7. Message: "1 of 1 can be deleted? Delete it?"-Y (The Location Copy, Serial Copy and pieces are now deleted)

NOTE: PARTS SHOULD NEVER BE DELETED

Deleting a Piece

1. Select "Holdings edit"
2. Select "Pieces display"
3. Select "Delete item(s)" and then type the line number(s) of the volume(s) you want to delete
4. When you get the message, e.g. "1 of 1 can be deleted. Delete it?"- Y
5. **Message: "Do you wish to delete receipt information for unlinked parts?" Always type- N**
6. Select "Go to"
7. Select "Locations display"
8. Select appropriate Locations Copy
9. Select "Holdings Statement"
10. Retrieve the Type of Holdings record
11. Update line 2: Textual statement
12. Accept
13. Accept
14. File

NOTE: PARTS SHOULD NEVER BE DELETED