ADVANCE

Holdings User's Guide

(Release 6.82)

September 2000

NOTE: To navigate in this manual, you can click on:

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1

Holdings Cataloguing

ADVANCE holdings is based on the USMARC Level 5 Holdings standard and provides a hierarchical and consistent means of describing single-part, multipart and serial items.

This section provides an overview of ADVANCE holdings and discusses:

- the database structure

- the Online Catalogue display of holdings information

- the Geac specific extensions to USMARC holdings

- the set up required in other modules.

Introduction

ADVANCE Holdings cataloguing:

- supports the USMARC Holdings format
- allows libraries to contribute to a Union Catalogue
- supports multiple physical formats
- allows support and display of electronic journal information
- provides a streamlined workflow.

Criteria for Holdings Design

ADVANCE Holdings is designed to provide

- straightforward single-part monograph holdings creation and maintenance
- alignment of database structures for serials and monographs
- efficient workflow — components can be updated separately or as one integrated maintenance
- the capability to move between holdings maintenance functions easily
- the ability to correct errors without re-keying data

Holdings Design Based on USMARC Holdings Standard

ADVANCE holdings provides a hierarchical and consistent means of describing single-part, multipart and serial items. Holdings information is based on the USMARC Level 5 Holdings standard with Geac specific modifications including:

- provisions for non-repeatable subfields
- last received issue and date
- type of holdings description (category of material, such as issue, supplement, or index)
- 9XX fields. These fields allow the system to provide additional information not available within the standard such as circulation status, owning locations, and other information normally found in the item record.

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Database Structure

Linkages to
Bibliographic Database

Linkages to
Bibliographic Database

Linkages from
Acquisitions Database

Type
of
Holding

Parts/
Volumes

Location
Copy

Linkages from
Acquisitions Database

Linkages to
Acquisitions
&
Serials Control

Linkages to
Circulation
&
Reserves

Pieces

Publication
Pattern
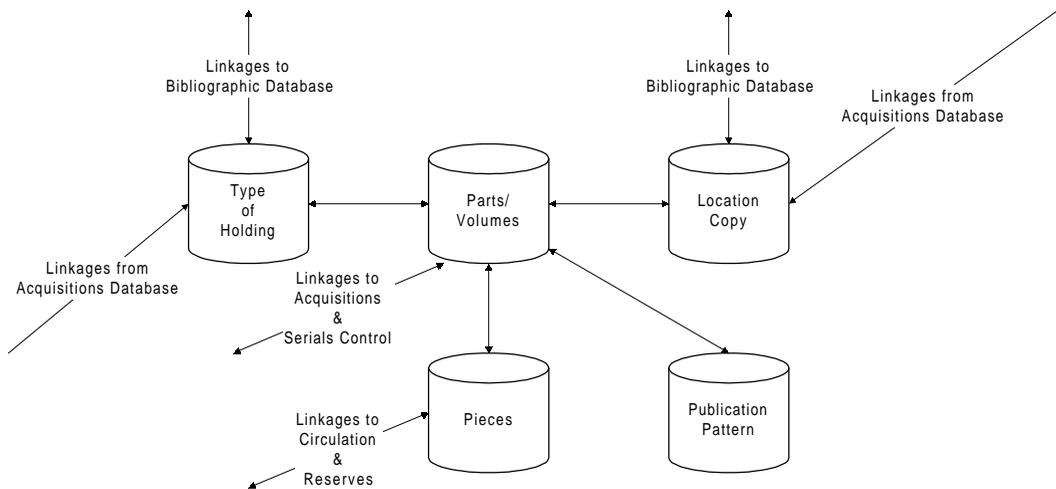
Each of the cylinders in this diagram represents one of the five basic records ADVANCE uses to store holdings information:

- Location copy records — used for all holdings

- Pieces records — used for all barcoded holdings

- Type of holdings records — used for multipart and serials holdings

- Publication pattern records — used for multipart and serials holdings

- Parts records — used for multipart and serials holdings

All holdings are defined in a similar way, whether they are single-parts or serials. The number of records required to describe a title depends on the material. Single-parts require the least description whereas serials require more records to accommodate the need to specify publication patterns and parts information.

Holdings Records

Location Copy Record

Purpose	Stores the locations where holdings reside. If you have multiple copies of a single-part monograph, each copy of the title has a location copy record. If you have multiple physical formats (for example, paper and microfiche), each title and format is represented by one Location Copy record. If a title is a multipart monograph and all the parts for a specific copy reside in the same location, then there is one location copy record for the set.
Information Stored	Includes institution, sublocation, collection code, call number, copy number information and physical format. For multiparts and serials, summarizes all parts/volumes from multiple types of holdings held in the location with a common copy designation.
USMARC Holdings Equivalent	Equivalent to separate MARC holdings records and includes textual notes (866/867/868).

Pieces Record

Purpose	Represents one barcoded item. Bound volumes are defined by one piece record for multiple parts/volumes.
Information Stored	Contains the circulation status and owning location.
USMARC Holdings Equivalent	Equivalent to each unique instance of a $p found in the 852/863/864/865.

Type of Holdings Record

Purpose	Categorizes the material and defines what it is fundamentally, for example, an issue, an index, supplement, or bound volume.
	Not required for single-part holdings.
Information Stored	Summarizes all parts/volumes for the type of holding.

USMARC Holdings Equivalent	Equivalent to a unique combination of 007 and 853/854/855 $o.

Publication Pattern Record

Purpose	Defines the frequency and regularity of publication. There is one record for each change of publication pattern within a type of holding.
Information Stored	Contains the captions or labels that identify the enumeration and chronology (numbering) levels for the type of holding. Includes the information necessary for Serials Control prediction.
USMARC Holdings Equivalent	Equivalent to an 853/854/855.

Parts Record

Purpose	Identifies each unique part/volume held by the library.
Information Stored	Contains the enumeration and chronology assigned to the part but does not contain any labelling information. Summarizes the status for each location copy.
USMARC Holdings Equivalent	Equivalent to an 863/864/865 in uncompressed format.

Holdings Maintenance

```
                              ┌──────────────┐
                              │ Holdings Edit│
                              └──────┬───────┘
      ┌──────────┬──────────┬───────┼──────────┬──────────────┐
 ┌────┴─────┐┌───┴──────┐┌───┴─────┐┌───┴──────┐┌─────┴─────┐
 │   OPAC   ││  Pieces  ││Locations││Bibliographic││  Order   │
 │ Display  ││ Display  ││ Display ││    Edit     ││ Display  │
 └────┬─────┘└───┬──────┘└───┬─────┘└───┬──────┘└─────┬─────┘
 ┌────┴─────┐┌───┴──────┐┌───┴─────┐┌───┴──────┐┌─────┴─────┐
 │ Type of  ││          ││Publication││Serial Copy││ Check-in │
 │ Holdings ││  Parts   ││ Pattern  ││  Display  ││  Serials │
 │ Display  ││ Display  ││ Display  ││           ││          │
 └──────────┘└──────────┘└─────────┘└──────────┘└──────────┘
```
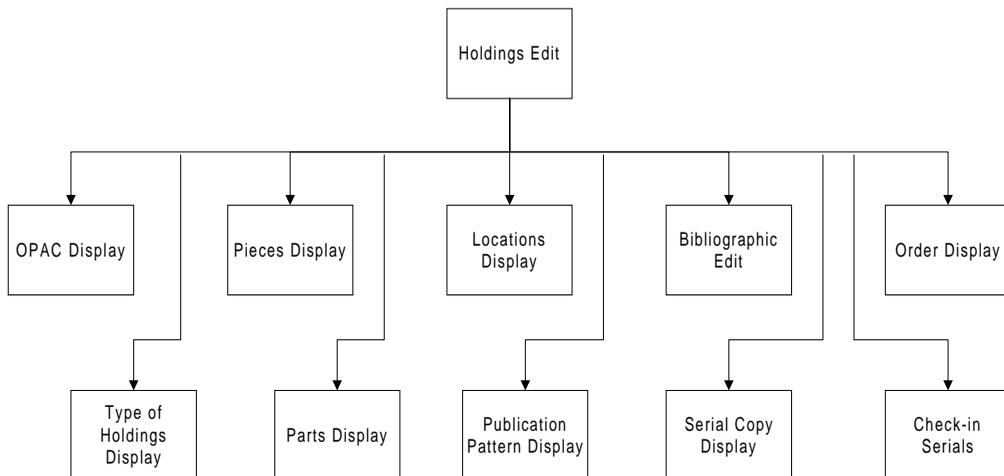
You can edit any holdings record from anywhere you can access the *Holdings edit* option. The number of editing functions available depends on the type of title you are working with: single-part, multipart/serial, or no holdings. For example, if you were editing a single-part item only the *OPAC display*, *Pieces display*, *Locations display*, *Bibliographic edit* and *Order display* options would be available since all other the options are used for editing multiparts and serials.

Go to Option

Within any of the holdings functions, you can use the *Go to* option to move to another function. For example, from the Pieces Summary you can go to any of the other options illustrated under Holdings Edit.

Linking

Within holdings there are specific situations when linking screens are used to associate information from one record to another record. This ability facilitates workflow and eliminates the need to repeatedly enter data.

Generally, the linking process involves using the `??` command in a field to browse a list. You can then retrieve the appropriate selection for the field and ADVANCE automatically enters the retrieved information in the field where you started from. For example, you can use the linking feature to attach a number of parts to one barcode.

Moving

The *Move* option allows you to move:

- all the holdings on a Location copy record to another title. For example, if a publication changes its title, you might move all the holdings to the new title.

- parts/pieces from one location to another title or to another location with this title. For example, you might move all parts to off site storage.

- parts records to another type of holding. For example, if you have the same title in two different physical formats, such as paper and microfiche, you can move all the paper parts to one Type of Holding record and all microfiche parts to another. Then, you would have separate publication patterns and predictions for each format.

- type of holdings record to another title. For example, if a publication has a title split, by moving the type of holdings record to the new title you automatically move all the parts associated with the type of holdings record to the new title without having to move parts individually.

- all holdings from one title to another title. For example, you can move all the holdings on one bibliographic record to another bibliographic record.

Accessing Holdings Maintenance

Access to all holdings functions is provided from the Edit Holding Information (`CEHI`) menu option from:

- Serials Control Main Menu in Serials Control

- Cataloguing Holdings Menu in Cataloguing

- Receiving Menu in Acquisitions

You can also edit holdings from the Edit Holdings (`CEH`) option on the Item Control Menu in Circulation.

Permissions

Editing holdings is permission controlled. Permissions can be used to restrict access in a broad or narrow manner. For example, you can allow anyone to edit holdings records, or you can restrict editing holdings records to a specific task and/or sublocation. Permissions are specified by the system administrator in the Utilities module. For more information about specific permissions refer to the appendix in the respective management guide.

Number	Permission	Module
68	Change MARC records	CAT
69	Change current information for holdings	CAT
70	Move holdings between locations	CAT
71	See financial data in vendor records	ACQ
72	Edit publication patterns	SER
73	Run reports from specific report group	Utilities
74	Edit reports from specific report group	Utilities
75	Add MARC records	CAT
76	Delete MARC records	CAT
77	Merge and replace MARC records	CAT
78	Add holdings	CAT

Number	Permission	Module
79	Delete holdings	CAT
80	Move holdings records between bibs	CAT
81	Change Checkout date and time	CIRC
82	Change due date and time	CIRC
83	Override administrative hold on patron	CIRC
84	Override max items checked/time limit	CIRC
85	Override items in possession limit	CIRC
86	Override patron group loan period	CIRC
87	Override maximum renewal limit	CIRC
88	Change Checkin date and time	CIRC
89	Suspend/Resume charging fine at Checkin	CIRC
90	Waive overdue fines during Checkin	CIRC
91	Remove traces for missing items	CIRC
92	Cancel holds	CIRC
93	Change hold scope	CIRC
94	Allow copy specific hold	CIRC
95	Change hold priority level	CIRC
96	View patron records	CIRC
97	Change patron records	CIRC
98	Add patron records	CIRC
99	Delete patron blocks	CIRC
100	Add patron blocks	CIRC
101	Delete patron blocks	CIRC
102	Process payment transactions	CIRC
103	Waive fines in Accounts Receivable	CIRC

Number	Permission	Module
104	Open and Close cash registers	CIRC
105	Access to RBR processing	CIRC
106	Change owning information for holdings	CAT
107	Change Call numbers	CAT
108	Check in serials	SER

Holdings Cataloguing from CEHI or CEH

You can retrieve item records by

- barcode (directly)
- OPAC search commands (indirectly) including the `LST` command.

When you enter a barcode, you are taken directly to the PIECES DETAIL record. Using a search command requires going through OPAC screens.

Barcode Entry

From the CATALOGUING HOLDINGS MENU (CHM):

1. Select `CEHI Edit Holding Information`.
2. The RETRIEVE HOLDINGS INFORMATION screen displays.
3. Enter the barcode from the keyboard, or by wanding or scanning a barcode label (if a wand or scanner is available).
4. If the barcode is already on file in the system, the system displays the Pieces record.
5. Edit the record and *File*.

Retrieving by Searching

From the CATALOGUING HOLDINGS MENU (CHM) or from within the Cataloguing module if you have keyword-use permissions:

1. Select `CEHI Edit Holding Information`.
2. The RETRIEVE HOLDINGS INFORMATION screen displays.
3. Enter an OPAC search command.

4. A list displays.

5. Select a line number.

6. A brief or full display screen displays.

7. Select the *Holdings edit* option. The option line changes to display the options used to edit holdings. Select an editing function. (Refer to the appropriate section of this manual for information about editing holdings.)

Record Display

Summary and Detailed Records

Holdings screens display in the sequence SUMMARY screen then the DETAIL screen, even if one record satisfies the search. For example, the LOCATION COPY SUMMARY screen always appears before the LOCATION COPY DETAIL screen displays. The same sequence applies to all other holdings records: Type of Holdings, Pieces, Publication Pattern, Parts, and Serial Copy Sets.

NOTE: The only exception to the Summary screen appearing first occurs when a search is made for a barcode number. In this case, the Pieces Detail screen appears when an exact match is made.

```
              LOCATION COPY SUMMARY                        MASTER

LCN      :10008609   Call #: UNC                   ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+    LCCN: sf 80001055

      Physical Location     Collection/Call number/Copy     Format
      -----------------     --------------------------      ------
1.   ADVLIB Central         GENERAL c.1                    Regular print
2.   ADVLIB Central         GENERAL c.2                    Regular print
3.   ADVLIB Central         GENERAL c.3                    Regular print
4.   ADVLIB Central         GENERAL c.4                    Regular print




4 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

Detail Screen

Detail screens display specific information. In this example, the information specifies where the item is located and what the item consists of – including its physical format.

```
                LOCATION COPY DETAIL                      MASTER

LCN      :10008609   Call #: UNC                   ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055


 LOCCPY key :  10031563
 1. Institution     : AL=ADVANCE Libra   9. Coded Location    :
 2. Sublocation     : CENTRAL=Central   10. Non-coded Location :
 3. Collection code : GENERAL=General   11. Classification src.:
 4. Call # prefix   :                   12. Shelving Title    :
 5. Call number     :                   13. Copyright fee code :
 6. Call # suffix   :                   14. Materials specified:
 7. Copy number     : 1                 15. Placeholder only   : N
 8. Retention policy: 0                 16. Physical format    : ta




Options:
 # line   Line by line   Pieces / Parts   Holdings statement
 MARC Holdings   Binding information   File   Delete   Quit holdings
 ? Help   Exit
```

OPAC Display of Holdings

The content of a idisplay screen in the Online Catalogue depends on a number of factors:

- Type of material (single-part, multipart, serial)

- Number of copies of the title

- The site-defined threshold (Threshold definitions are made on the OPAC Holdings Display (OHD) menu which is accessed from the Online Search Setup Menu).

ADVANCE analyses this combination of factors and displays the appropriate level of holdings: Level 1, Level 2, Level 4, or Level 5.

Level 1

Level 1 displays location information and summarizes that there are holdings at a specific Institution, Sublocation, and Collection. No copy or circulation status information is available at this level.

Level 1 only appears if you get stopped at your threshold limits.

```
                    Online Catalogue - BRIEF DISPLAY       (1 of 1 titles)

Author(s)       :Howard, Sidney Coe, 1891-1939
                 Bridges, Herb, 1928-
                 Boodman, Terryl C.
                 Mitchell, Margaret, 1900-1949. Gone with the wind
Title           :Gone with the wind, the screenplay
Year            :c1989.
Subject         :United States -- History -- Civil War, 1861-1865 -- Drama
Language        :English

HELD AT THE FOLLOWING LOCATIONS, CHOOSE ONE FOR MORE DETAIL
 1.   ADVLIB Central GENERAL
 2.   ADVLIB Central MRR
 3.   ADVLIB Central NLS/BPH




3 item(s) in list.
Options:
 # item   Prior screen   Extend search   Limit list   Full display   Output
 MARC   Holds   ILL request   Order display   Review search   OPAC parms
 New search   Reset   ? Help
```

Level 2

Level 2 is used to display copies of a single-part and includes all location information, copy numbers, circulation status, and other piece information.

Electronic copies of single-part titles also display at this level.

In previous releases, ADVANCE displayed this information on the PIECES SUMMARY screen.

```
                    Online Catalogue - BRIEF DISPLAY        (1 of 1 titles)

Author(s)        :Howard, Sidney Coe, 1891-1939
                  Bridges, Herb, 1928-
                  Boodman, Terryl C.
                  Mitchell, Margaret, 1900-1949. Gone with the wind
Title            :Gone with the wind, the screenplay
Year             :c1989.
Subject          :United States -- History -- Civil War, 1861-1865 -- Drama
Language         :English

CURRENT LOCATION & COPIES HELD:
     Location           Collection     Call Number/Copy #      Status / Due
     --------           ----------     ------------------      -----------
 1.  ADVLIB Central     GENERAL        c.1                     On Order
 2.  ADVLIB Central     GENERAL        c.2                     On Order
 3.  ADVLIB Central     GENERAL        c.3                     On Order
 4.  ADVLIB Central     GENERAL        c.4                     On Order
 5.  ADVLIB Central     GENERAL        c.5                     On Order
10 item(s) in limited list.
Options:
 # item    Forward    Prior screen    Extend search    Full display
 Limit list    Output    MARC    Holds    ILL request    Order display
 Review search    OPAC parms    New search    Reset    ? Help
```

Level 3

Level 3 is not used in the OPAC display.

Level 4

Level 4 displays location information and summary holdings statements for every copy of a multipart or serial held by the library. Each item in the display represents a different copy.

This level is also used to display electronic copies of a multipart or serial title.

```
                     Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)

Author(s)       :World Clean Air Congress (9th : 1992 : Montréal, Québec)
                 International Union of Air Pollution Prevention Associations
                 Air & Waste Management Association
Title           :Waste management : papers from the 9th World Clean Air
                 Congress, Towards the year 2000--critical issues in the global
                 environment, Montréal, Québec, Canada, August 30-September 4,
                 1992
Year            :1992.
Subject         :Refuse and refuse disposal -- Congresses
                 Air quality management -- Congresses
Series          :Critical issues in the global environment; v. 1
Language        :English

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.  ADVLIB Central GENERAL c.1
     Set: v.1-v.10
 2.  ADVLIB Central GENERAL c.2
2 item(s) in list.
Options:
 # item   Forward   Prior screen   Extend search   Full display
 Limit list   Output   MARC   Holds   ILL request   Order display
 Review search   OPAC parms   New search   Reset   ? Help
```

Level 5

Level 5 displays detailed information about a specific copy of a multi-part or serial title including the location of the copy. Each issue or volume (contained within the copy) whether barcoded or not can be displayed at this level.

```
                      Online Catalogue - BRIEF DISPLAY       (1 of 1 titles)

  Author(s)      :Massachusetts. Laws, etc.
                  West Publishing Company
  Title          :Massachusetts general laws annotated, under arrangement of the
                  official General laws of Massachusetts
  Year           :[1958-
  Subject        :Law -- Massachusetts
  Language       :English

  Location :  AL CENTRAL GENERAL
      Issue Number                                        Status
      ------------                                        ------
   1.  No.9(1997:AUG)                                     Exp issue
   2.  No.5(1997:JAN)-No.8(1997:AUG)                      Received



  2 item(s) in list.
  Options:
   # item   Prior screen   Extend search   Limit list   Full display   Output
   MARC   Holds   ILL request   Order display   Review search   OPAC parms
   New search   Reset   ? Help
```

Setting Thresholds

The Holdings Thresholds Definition table is intended for use by large union catalogues. Use these definitions if you have huge numbers of copies of the same title. With thresholds the system displays a summary of institutions, sublocations and collections where the copies are held and asks the patron to choose a line number for more detail. Without thresholds the patron may page through hundreds of copies of detailed information to reach the desired copy.

Threshold Setup Tables   Threshold limits are set on the Holdings Threshold Table. To reach this table select the OPAC HOLDINGS DISPLAY DEFINITION (OHD) table from the ONLINE SEARCH SETUP (OSUP) menu.

Not Setting Thresholds   If no thresholds are set, ADVANCE displays the level of holdings that provides the most detail for the title. For all but the largest libraries or consortia, this is the best solution.

In general this means that if the title is a single-part, a level 2 holdings display is generated; for serial or multipart titles a level 4 holdings display is displayed.

How the System Determines the Level of Display

Threshold limits provide ADVANCE with a way of determining which level of holdings information to display. ADVANCE looks at both the number of copies of the title (that is the number of location copy records) and the number of Institutions, Sublocations, and Collections when it makes an assessment of the records.

The system tests the thresholds in sequence, beginning with the Institution level, then Sublocation, and Collection. In addition, the system checks that the number of institutions, sublocations and collections is more than one.

Holdings Set Up in Other Modules

OPAC

The OPAC Display Definitions and OPAC threshold limits are specified on the OPAC Holdings Display (OHD) menu on the Online Search Setup Menu.

The OPAC Display Definitions determine the format and content of holdings screens.

OPAC threshold limits determine what level of holdings information displays in the Online Catalogue.

Utilities

Permissions are set up from the Enter Access Code (EACC) and ADVANCE Security Menu (SECUR) on the Systems Utility Menu.

Cataloguing

Use the Holding Setup Menu (CHSM) on the Cataloguing Holdings Menu to specify such information as Institution, Sublocation, Collection, Frequency, Chronology, and Physical Format Codes.

2
Single-part Holdings

Single-part items are complete in one physical part, such as a one-volume book, a musical score, a map, or a computer file. ADVANCE uses one or two records to define a single-part item:

- Location Copy record
- Pieces record

Location Copy Record

Single-part item definitions always include a Location Copy record. This record defines a specific copy of an item at a specific location. The Location Copy Summary screen displays all the locations for a specific title. The Location Copy Detail screen includes the institution, sublocation, collection, call number, call number prefixes and suffixes, and copy number for a specific item.

In prior releases of ADVANCE this information and the barcode were displayed on the Holdings Display screen and the data was stored in the pieces record.

Pieces Record

Pieces records contain the barcode, circulation and inventory control information. The Pieces Summary screen lists all the barcoded items for a specific title. The Pieces Detail screen displays current and owning location along with other circulation, physical, and notes information.

A pieces record is not needed if the item is not barcoded or if the item is an electronic file.

Multiple Formats

You can define multiple formats for the same title by using the *Physical format* field on the Pieces Detail screen to define a format for a partic-

ular barcode number. This format is carried over into the *Physical format* field on the Location Copy Detail screen.

When to use Holdings Edit for Single-Part Items

You need to use *Holdings edit* when:

- you are adding new locations

- you are withdrawing a barcoded item

- you are assigning a new barcode

- you are moving an item to a new or a different location

- you are cataloguing electronic titles

- you are creating a Fast Add piece

- you are creating placeholders.

Single-Part Example

This drawing illustrates the records used to describe the holdings for the bibliographic item *Integrated Online Library Systems*. Location Copy and Pieces records define single-part holdings. A Location Copy record contains the location information and the physical format for one copy of a title. A Piece record describes one barcoded piece.

The institution ADVLIB holds three copies of the title. Copy 3 is located

```
            ┌──────────────────────────┐
            │     - Main Database -     │
            │ Integrated Online Library │
            │          Systems          │
            └──────────────────────────┘
```

```
┌────────────────────────┐  ┌────────────────────────┐  ┌──────────────────────────┐
│ - Location Copy Record -│  │ - Location Copy Record -│  │ - Location Copy Record -  │
│ ADVLIB Central General  │  │ ADVLIB Central General  │  │ http://www.info.lib.uh.edu/│
│         copy 3          │  │         copy 2          │  │      sepb/sepb.html       │
└────────────────────────┘  └────────────────────────┘  └──────────────────────────┘
```

```
┌────────────────────────┐  ┌────────────────────────┐
│       - PIECES -        │  │       - PIECES -        │
│       00017762859       │  │       00035778843       │
│      In Processing      │  │    Due: Feb 26, 1998    │
└────────────────────────┘  └────────────────────────┘
```
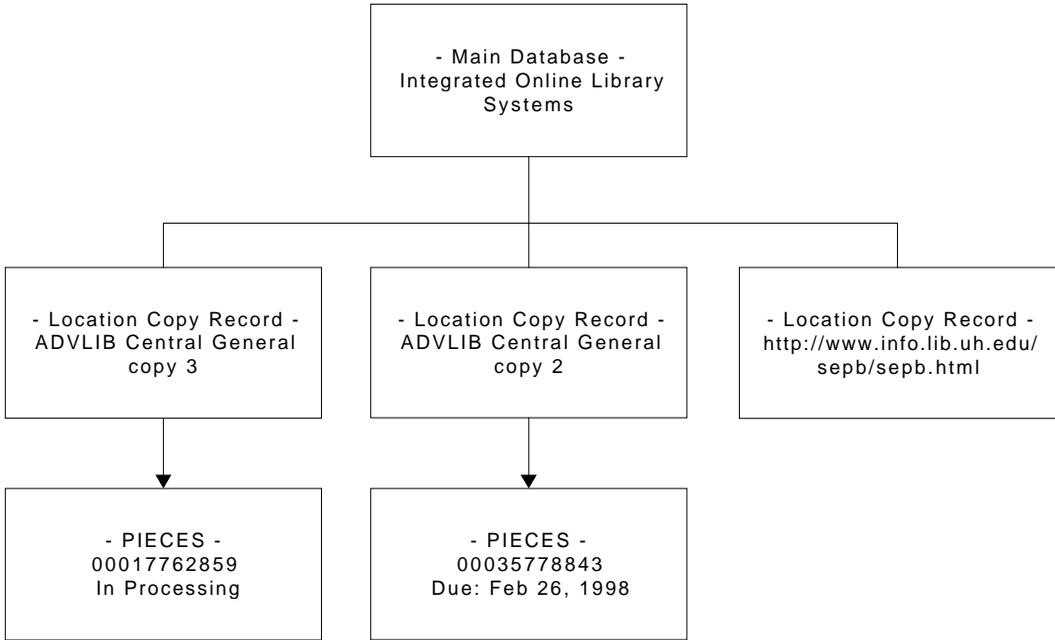
at ADVLIB Central and is currently *In processing*. The second copy is also located at ADVLIB Central and is due back in the library February 26. Another copy is available online and has no pieces record associated with it. It is not barcoded because it is an electronic copy and has no physical counterpart.

When a new piece is created for a single-part monograph from the Pieces Detail screen, the system prompts you to enter information about the piece's location (for example, Institution, Sublocation, Call Number codes, copy number and so forth). When you file the Pieces Detail

screen, the system creates a location copy record containing the piece's location information, and links the new Pieces record to the Location Copy record. Therefore, when you add holdings to a single-part biblio-graphic item, you only have to define the Pieces record. The system creates the Location Copy record for you.

Adding Single-Part Holdings

Single-part titles require a Pieces record. The only exception is electronic titles which have no Pieces record and require you to define a Location Copy record.

When you create a Pieces record for a single-part title, the system creates a Location Copy record. After you file the Pieces Record you can display the Location Copy record by using the *Locations display* option from Holdings edit.

Task Summary

To add holdings to a bibliographic item that has no holdings, start by defining the item as a single-part. Then use the steps for adding holdings to records with existing holdings.

1. Search for the bibliographic record and access the BRIEF (or FULL) Display.

2. Select *Holdings edit*.

3. If the bibliographic record has:

   • no holdings, select the *Single-part* option.

   • existing holdings, select the *Pieces display* option.

4. Use the *Add item* option on the PIECES SUMMARY screen. The PIECES DETAIL-SINGLE-PART screen appears.

5. Enter the required data and *File* the record.

Adding Pieces to Titles with no Holdings

1. Obtain the BRIEF or FULL DISPLAY for the desired record.

```
                     Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10009644
LCCN            :92508036 /MP
AUTHOR          :Vanderbilt Television News Archive Collection (Library of
                 Congress)
TITLE           :Nightline. [1989-06-26]
Pub/Size        :ABC-TV, 3/4 in. master.

HELD AT THE FOLLOWING LOCATIONS, CHOOSE ONE FOR MORE DETAIL




0 item(s) in list.
Options:
 # item   Prior screen   Holdings edit   Extend search   Full display
 Limit list   Output   MARC   Order display   Review search   OPAC parms
 New search   Reset   ? Help
```

2. Select *Holdings edit*. A new option line appears.

```
                     Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10009644
LCCN            :92508036 /MP
AUTHOR          :Vanderbilt Television News Archive Collection (Library of
                 Congress)
TITLE           :Nightline. [1989-06-26]
Pub/Size        :ABC-TV, 3/4 in. master.

HELD AT THE FOLLOWING LOCATIONS, CHOOSE ONE FOR MORE DETAIL




0 item(s) in list.
Options:
 OPAC display   Single-part   Multipart/serial   Bibliographic edit
 Order display   Exit
```

3. Select *Single-part.* The PIECES SUMMARY screen appears.

```
              PIECES SUMMARY                           MASTER

LCN     :10009644   Call #: VSA 9806 (master)        ISSN:
Title   :Nightline. [1989-06-26]
Imprint :United States : ABC-TV, 1989-06-26.         LCCN: 92508036 /MP

     Pieces key       Location Information  Current Status   Numbering   Notes
     ----------       -------------------- --------------   ---------   -----




0 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Multipart/serial   Go to
 Limit list   Quit holdings   ? Help   Exit
```

4. Select the *Add item* option. Follow the instructions from Step 4 in the following section.

Adding Pieces to Records with Existing Holdings

Task Details

1. Obtain the BRIEF or FULL DISPLAY.

```
                    Online Catalogue - BRIEF DISPLAY       (1 of 1 titles)
Local Control # :10003333
LCCN            :84015406 //r953
AUTHOR          :Genaway, David C., 1937-
TITLE           :Integrated online library systems : principles, planning, and
                 implementation
Pub/Size        :Knowledge Industry Publications, 29 cm.

CURRENT LOCATION & COPIES HELD:
     Library   Locn         Call Number          Ltype    Status / Due date
     -------   -------   -------------------------  -----    -----------------
 1.  Central   GEN-STA    c.3                        2week    In Processing
 2.  Central   GENERAL    c.2                        INTUSE   DUE: 02/26/98 23:




2 item(s) in list.
Options:
 # item   Prior screen   Holdings edit   Extend search   Full display
 Limit list   Output   MARC   Order display   Review search   OPAC parms
 New search   Reset   ? Help
```

2. Select *Holdings edit*. The option line changes.

```
                        Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10003333
LCCN            :84015406 //r953
AUTHOR          :Genaway, David C., 1937-
TITLE           :Integrated online library systems : principles, planning, and
                 implementation
Pub/Size        :Knowledge Industry Publications, 29 cm.

CURRENT LOCATION & COPIES HELD:
     Library   Locn       Call Number         Ltype    Status / Due date
     -------   -------    ------------------------  -----    -----------------
 1.  Central   GEN-STA   c.3                         2week    In Processing
 2.  Central   GENERAL   c.2                         INTUSE   DUE: 02/26/98 23:



2 item(s) in list.
Options:
 OPAC display   Pieces display   Locations display   Bibliographic edit
 Order display   Exit
```

3. Select *Pieces display.* The PIECES SUMMARY screen appears.

```
            PIECES SUMMARY                                    MASTER

LCN      :10003333  Call #: Z678.9.G45 1984              ISSN:
Title    :Integrated online library systems : principles, planning, and impl+
Imprint  :White Plains, NY : Knowledge Industry Pu+       LCCN: 84015406 //r9

     Pieces key       Location Information  Current Status   Numbering   Notes
     ----------       --------------------  --------------   ---------   -----
 1.  00017762859      ADVLIB Central        In Processing                N
                      GEN-STAFF c.3
 2.  00035778843      ADVLIB Central        DUE: 02/26/98                N
                      GENERAL c.2
     Staff notes: Send for deacidification Lot 651 / Rebind after
     deacidification / deacidify / 19970502 / DLC / bind / 19970804 / DLC




2 item(s) in list.
Options:
 # item  Add item  Delete item(s)  Move #(s)  Multipart/serial  Go to
 Limit list  Quit holdings  ? Help  Exit
```

4. Select the *Add item* option. The PIECES DETAIL- SINGLE-PART screen appears. The message `** New record **` appears above the editable fields. For a description of the fields, see *Pieces Detail — Single–parts* on page 7-5.

```
              Online Catalogue PIECES DETAIL - SINGLE-PART
Local Control #:  10003333                            Format  : BK
Status     : Not Available
Title      : Integrated online library systems : principles, planning, and
Author     : Genaway, David C., 1937-
Updated By :                  Patron  :              Last out:
Update Date:                  Due Date:              Created :
Inventory  :                  Due Time:              Circ Cnt: 0 (0)
** New record **
 1. Barcode     : 39990008888
 2. Current Locn : AL CENTRAL GENERAL
 3. Owning Locn  : AL CENTRAL GENERAL
 4. Pend. Action :                    11. Shelving title  :
       +----------------------- Current Data --------------------------+
       |  Institution      :  AL=ADVANCE Library                       |
       |  Sublocation      :  Landover=Landover                        |
       |  Collection code  :  GENERAL=General Collection               |
       |  Call number prefix :                                         |
       |  Call number        :                                         |
       |  Call number suffix :                                         |
       |  Copy Number      :                                           |
       +--------------------------------------------------------------+
Enter the current copy number
```

5. Enter a new barcode.

6. At the *Current Locn* field enter C. A window opens. Enter new codes at the Institution, Sublocation, and Collection fields or enter ?? on each location code field of the window to browse a list of codes. When all the fields are complete, *File* and <Enter>. The PIECES SUMMARY screen appears and displays the new location and barcode.

   NOTE: If you enter C on the owning location, a similar window opens. You can edit the Institution, Sublocation, and Collection fields or enter ?? to browse a list of codes

```
                   PIECES SUMMARY                           MASTER

LCN      :10003333  Call #: Z678.9.G45 1984            ISSN:
Title    :Integrated online library systems : principles, planning, and impl+
Imprint  :White Plains, NY : Knowledge Industry Pu+      LCCN: 84015406 //r9

     Pieces key       Location Information  Current Status   Numbering   Notes
     ----------       -------------------  --------------    ---------   -----
 1.  00017762859      ADVLIB Central       In Processing                  N
                      GEN-STAFF c.3
 2.  00035778843      ADVLIB Central       DUE: 02/26/98                  N
                      GENERAL c.2
     Staff notes: Send for deacidification Lot 651 / Rebind after
     deacidification / deacidify / 19970502 / DLC / bind / 19970804 / DLC
 3.  39990008888      ADVLIB Landover      In Library                     N
                      GENERAL c.4


3 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Multipart/serial   Go to
 Limit list   Quit holdings   ? Help   Exit
```

To see the Location Copy records that ADVANCE has added select
the *Go to* option. The option line changes. Choose the *Locations
display* option to see the LOCATION COPY SUMMARY. The addi-
tional copy also displays in the Online Catalogue.

```
                  LOCATION COPY SUMMARY                     MASTER

LCN      :10003333  Call #: Z678.9.G45 1984            ISSN:
Title    :Integrated online library systems : principles, planning, and impl+
Imprint  :White Plains, NY : Knowledge Industry Pu+      LCCN: 84015406 //r9

     Physical Location   Collection/Call number/Copy      Format
     ------------------   --------------------------      ------
 1.  ADVLIB Central      GEN-STAFF c.3                    not defined
 2.  ADVLIB Central      GENERAL c.2                      not defined
 3.  ADVLIB Landover     GENERAL c.4                      not defined
 4.  WWW                                                  not defined


4 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

Deleting Pieces

1. Obtain the PIECES SUMMARY display.

```
              PIECES SUMMARY                                MASTER

 LCN    :10003333   Call #: Z678.9.G45 1984             ISSN:
 Title  :Integrated online library systems : principles, planning, and impl+
 Imprint :White Plains, NY : Knowledge Industry Pu+     LCCN: 84015406 //r9

      Pieces key       Location Information  Current Status   Numbering   Notes
      ----------       --------------------  --------------   ---------   -----
  1.  00017762859      ADVLIB Central        In Processing                N
                       GEN-STAFF c.3
  2.  00035778843      ADVLIB Central        DUE: 02/26/98                N
                       GENERAL c.2
      Staff notes: Send for deacidification Lot 651 / Rebind after
      deacidification / deacidify / 19970502 / DLC / bind / 19970804 / DLC
  3.  39990008888      ADVLIB Landover       In Library                   N
                       GENERAL c.4




 1 of 1 can be deleted. Delete them (Y/N)?
```

2. Select the *Delete item(s)* option and enter the number(s) of the item you want to remove. The system prompts you for confirmation. If you answer *yes* the piece(s) and the associated location copy record(s) are deleted.

3

Multipart Holdings

This section deals with multipart holdings that are not under serials control. Examples include: multipart items that are complete in a finite number of individual physical parts, such as a twenty-volume encyclopedia; a set of maps; a two-volume desk reference set; or collection of music on compact discs. ADVANCE may use up to five records to define a multipart item:

• Location Copy record

• Pieces record (if the material is barcoded)

• Type of Holding record

• Publication Pattern record

• Parts record

A multipart item uses a Type of Holding record to specify the types of publication (issue, index, supplement) that comprise the set. You may have as many Types of Holding records as needed to completely define the set. The Publication Pattern record is linked to the Type of Holding and it describes the captions used in the numbering, such as v., no. The Publication Pattern is not used to define the frequency of publication or to predict future issues. If the captions for the individual parts change, a new Publication Pattern record can be created to replace the old record. A Parts record is created to define each of the numbered parts in a set. The Parts record contains the numbering on the part and uses a link to the Publication Pattern record to define the captions that should be used to display the part.

The following diagram illustrates the relationship between the various types of records. Notice that each record stores specific information, such as the location or the barcode number.
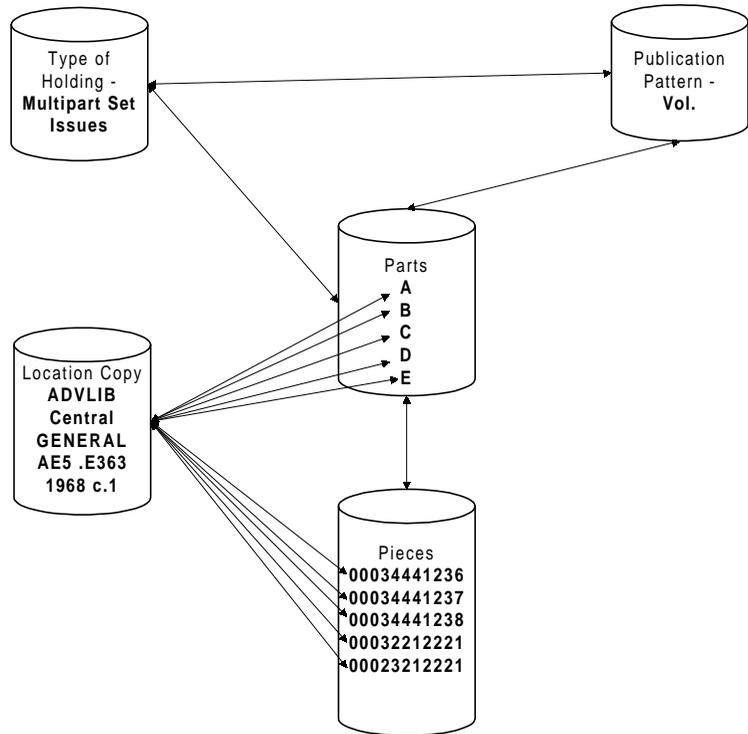
Location Copy Record

Multipart items always have an associated Location Copy record. This record defines a specific copy of an item or a set at a specific location. The Location Copy Summary screen displays all the locations for a specific title. The Location Copy Detail screen includes the institution, sublocation, collection, call number, call number prefixes and suffixes, and copy number for a specific item.

The Location Copy Summary screen lists all the locations defined for this particular multipart title, but does not display the parts available at each location. A list of parts for a given location can be obtained by selecting the *Pieces/parts* option from the Location Copy Detail screen.

Pieces Record

A multipart pieces record is not needed if the part is not barcoded. However, all multipart pieces must be linked to at least one part.

All pieces records contain the barcode, circulation and inventory control information. The Pieces Detail screen also displays current and owning location along with other circulation information. The Pieces Summary screen lists all the barcoded items for a specific title.

A multipart piece can consist of several parts that belong to different Types of Holdings. For example, you could have a piece that consists of three volumes and an index, defined by two Type of Holding records, one for issues and one for an index.

Type of Holdings Records

Type of Holdings records define the type of publications associated with the multipart bibliographic item. The type of publication categories are: issues, supplements, and indexes. You can define as many Type of Holdings records as you need; for example, you may define a category for bound volumes. The Type of Holdings screen also provides access to the associated Publication Pattern and Parts records.

Displaying Holdings

The system uses the data entered in the Type of Holding record in combination with the Location Copy Detail (Holding location data and location holding statements) to construct the OPAC holdings displays. For each location copy, each Type of Holding is identified by the data entered in the description field of the Type of Holding record. Under the description of the type of holding the summary holdings for that type of holding for that location is displayed. The sequence of display of the different types of holding associated with each location copy is: issues, indexes, supplements.

Where you view Holdings from determines whether you see all holdings or holdings for a specific location. For example, when you search from the Online Catalogue, the system displays holdings for the entire library system. When you retrieve a title for a specific location, that is, look at the Location Copy Detail screen and ask for a Holdings Statement, you see only the holdings for that location.

Viewing Type of Holdings Records

Type of Holding records can be viewed from different levels within Holdings Edit. This makes it very convenient for your library to accommodate multiple formats and or types of holdings for the same title.

When you use the *Type of holding display* option from Holdings edit, the system displays all the types of holdings for the item (i.e., issues, indexes and supplements) for all locations within the library. When you display a Type of Holding Summary screen from the Parts Detail screen, using the *Type of Holding* field, you are seeing only the Type of Holding defined for that Part. In another situation, if you display a Holdings Statement from the Location Copy Detail screen, the system displays Holdings Statement for only the types of holding for that specific location. You may know that indexes are available for an item but while this is evident from the perspective of the entire library, when you view the holdings for a specific branch, the indexes will not appear.

For example, your collection may contain an encyclopedia in both book format and CD-ROM. Because you only have CD-ROM readers at one location, you can easily modify your Type of Holding record to show that difference. Your primary Type of Holding record would be defined for Book Format. When the individual parts are defined, all the books are linked to the primary Type of Holding record. For the CD-ROM version you could obtain the Parts Detail screen and define a new Type of Holding record for the CD-ROM (or if you have a CD-ROM definition you can use that or modify it).

Publication Pattern Records

For multiparts, Publication Pattern records define the labels and captions for individual parts. Frequency and regularity of publication are not generally necessary for multiparts, unless they are under Serials Control and receipts are predicted.

You can define as many Publication Patterns as you want. The pattern that the system is using is marked `** ACTIVE **` on the Publication Pattern Detail screen. There can be any number of active or inactive patterns retained on the system. For example, you may have several active patterns representing issues in more than one format and likewise indexes and supplements in paper, microfiche and electronic formats. A pattern becomes active when it is filed. New Publication Patterns may be defined to reflect changes made by the publisher to the labels and captions. In this case, both the old and the new patterns would be active.

Viewing Publication Pattern Records

When you select the *Pub. Pattern display* option from Holdings edit, the system displays all the publication patterns for all the title's types of holdings, for example, issues, supplements, and indexes. In contrast, when you look at a Publication Pattern from a Type of Holding record,

that is, use the *Patterns* option from the Type of Holding Detail screen, you see the Publication Pattern(s) for that specific Type of Holding, for example, issues only.

Parts Records

The Parts Summary screen displays all the parts for an item. The Parts record is created for each individual part in the multipart set. It contains the numbering for the part.

Parts records are defined once. Each new part is added by inserting an item on the Parts Summary screen, or for barcoded items, linking the new item to an existing barcode from the *Volume/Part#* field on the Pieces Detail screen. In each situation, only the numbering would change, assuming the caption remains the same.

Viewing Parts Records

When you select Parts display from Holdings edit, the system displays all the title's parts for all types of holdings.

If you use the *Parts* option from the Type of Holdings Detail screen, only the parts that belong to that type of holding are displayed.

If you access the LINKED PARTS from the Pieces Detail screen by entering ?? in the *Volume/Part#* field, the system lists all the parts that are linked to the specific barcode shown on the Pieces Detail screen.

From the LINKED PARTS screen, if you use the *Link* option, the system displays the LINK PARTS TO PIECES screen. This screen displays all the parts belonging to this Type of Holding for the piece's location. This screen also displays the current status for the part, an indicator specifying whether the part is linked to a barcode, and a field indicating whether the part is linked.

Multiple Formats

Multiple physical formats for one bibliographic record's holdings can be accommodated by defining multiple Publication Pattern records and assigning the appropriate physical format at the Location Copy Detail screen. Thus, an encyclopaedia could be available in book format at one location and on CD-ROM at another location. The title could share the same Type of Holding record but would have separate Publication Pattern and Parts records.

Creating Multiparts through Acquisitions

When an order for a new multipart title is transferred to the Catalogue, one location copy record is created for each copy specified on the Allocations screen. When parts are received and transferred, ADVANCE creates a default ISSUE Type of Holding, a Pattern (with labels provided by information entered in the Notes screen for the order), Parts for the received parts, and one Pieces record linked to each Part received at each location. Part numbering can be specified by using the Notes option in the Order Update function and this numbering will be used by ADVANCE in creating the Parts records.

When to Use Holdings Edit for Multipart Items

You need to use *Holdings edit* when:

- defining the holdings as multipart (if no holdings exist)

- adding or deleting locations, pieces, parts, types of holdings, publication patterns

- moving holdings to a different location or bibliographic record

- moving parts to a different Type of Holding

- linking parts to a piece

- unlinking parts from a piece

- printing spine labels

- updating any holdings record for a title (for example, updating the pieces barcode, or location copy format)

- converting single-part holdings to multipart holdings or vice-versa

- sequencing the display of Types of Holdings for a title

- sequencing the display of Parts for a Type of Holding

- displaying the circulation status for a given piece

- barcoding pieces

- creating placeholder barcodes

Multipart Example

The following diagram uses the CD-ROM version of the *Encyclopedia Britannica* to show the basic component records that are used to define the holdings. The title consists of a two-part set contained on Disks 1 and 2. There are two copies of the set, both are at the same location but they belong to different collections. The copy in the General collection is available for checkout while the copy in the Ser & Docs collection is in processing and is not available for checkout.

The set, as defined by the Type of Holding record, has two parts. Each part is identified by the label *Disk.* which is defined in the Publication Pattern record.

The most significant part of the example is that the individual parts that belong to the set are defined only once, even though there are multiple copies of the set.

```
                              ┌─────────────────────────┐
                              │    - MAIN DATADASE -     │
                              │  Encyclopaedia Britannica │
                              └─────────────────────────┘

┌──────────────────────┐    ┌──────────────────────┐    ┌──────────────────────┐
│  - Type of Holding -  │    │ - Location Copy Record - │  │ - Location Copy Record - │
│  define the 'set' - 2 parts │  │  ADVLIB Central General │  │    ADVLIB Central    │
│  numbered Disk.1 and  │    │        AE5 c. 1        │    │    SER&DOCS c. 2     │
│        Disk.2         │    └──────────────────────┘    └──────────────────────┘
└──────────────────────┘

┌──────────────────┐  ┌──────────────────┐  ┌──────────────────────┐
│    - PUBPAT -    │  │    - PARTS -     │  │      - PIECES -      │
│ captions = Disk. │  │  numbering = 1   │  │ 00034441234 - Available │
└──────────────────┘  └──────────────────┘  └──────────────────────┘

                      ┌──────────────────┐  ┌──────────────────────┐
                      │    - PARTS -     │  │      - PIECES -      │
                      │  numbering = 2   │  │ 00034441235 - Available │
                      └──────────────────┘  └──────────────────────┘

                                            ┌──────────────────────┐
                                            │      - PIECES -      │
                                            │ N1000009 - In Processing │
                                            └──────────────────────┘
                                            ┌──────────────────────┐
                                            │      - PIECES -      │
                                            │ N1000008 - In Processing │
                                            └──────────────────────┘
```

Adding a Multipart Piece

Purpose

This example discusses:

- adding a piece either as a new or an existing multipart

- editing the Pieces record.

Task Summary

To add a multipart piece:

1. Obtain the search screen and select *Holdings edit*.

2. Select the *Multipart/serial* option.

3. Select the *Pieces display.* The PIECES SUMMARY screen appears.

4. Select *Add item*. The PIECES DETAIL screen appears.

5. Enter a barcode.

6. At the *Current Locn* field enter ??. The LOCATION COPY SUMMARY screen appears.

7. Use the Retrieve # option to insert a location in the *Current Locn* field.

8. Enter the owning location information.

9. Enter ?? at the *Volume/Part#* field.

10. Select *Link* option. The LINK PARTS TO PIECE screen appears.

11. Select the Retrieve item(s) option and enter the numbers of the parts you are linking to this piece.

12. Select *Accept*.

13. If you do not want spine labels to use the information in the Volume/ Part# field, enter the appropriate information in the *Bound Label* field.

14. Complete the PIECES DETAIL screen and *File*.

15. The PIECES SUMMARY screen appears.

Procedure

If you are creating a new multipart piece, start at step 1. If you are adding a piece to an existing title, omit step 2.

```
                        Online Catalogue - BRIEF DISPLAY        (1 of 1 titles)
Local Control # :10006223
LCCN            :93073891
AUTHOR          :Encyclopaedia Britannica, inc.
TITLE           :The new encyclopaedia Britannica
Pub/Size        :Encyclopaedia Britannica, 29 cm.

HELD AT THE FOLLOWING LOCATIONS, CHOOSE ONE FOR MORE DETAIL




0 item(s) in list.
Options:
 # item   Prior screen   Holdings edit   Extend search   Full display
 Limit list   Output   MARC   Order display   Review search   OPAC parms
 New search   Reset   ? Help
```

1. From the search screen, select *Holdings edit*. The option line changes.

```
                        Online Catalogue - BRIEF DISPLAY        (1 of 1 titles)
Local Control # :10006223
LCCN            :93073891
AUTHOR          :Encyclopaedia Britannica, inc.
TITLE           :The new encyclopaedia Britannica
Pub/Size        :Encyclopaedia Britannica, 29 cm.

HELD AT THE FOLLOWING LOCATIONS, CHOOSE ONE FOR MORE DETAIL




0 item(s) in list.
Options:
 OPAC display   Single-part   Multipart/serial   Bibliographic edit
 Order display   Exit
```

2. Select the *Multipart/serial* option. The option line changes.

```
                        Online Catalogue - BRIEF DISPLAY        (1 of 1 titles)
Local Control # :10006223
LCCN           :93073891
AUTHOR         :Encyclopaedia Britannica, inc.
TITLE          :The new encyclopaedia Britannica
Pub/Size       :Encyclopaedia Britannica, 29 cm.


HELD AT THE FOLLOWING LOCATIONS, CHOOSE ONE FOR MORE DETAIL




0 item(s) in list.
Options:
 OPAC display    Pieces display    Type of holdings display    Parts display
 Pub. pattern display   Locations display   Serial copy display
 Check-in serials    Bibliographic edit   Order display    Exit
```

3. Select *Pieces display.*The PIECES SUMMARY screen appears.

```
             PIECES SUMMARY                                    MASTER
LCN     :10006223   Call #: AE5.E363 1995               ISSN:
Title   :The new encyclopaedia Britannica
Imprint :Chicago : Encyclopaedia Britannica, c199+       LCCN: 93073891

      Pieces key       Location Information  Current Status   Numbering    Notes
      ----------       --------------------  --------------   ---------    -----




0 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings    ? Help   Exit
```

4. Select *Add item*. The PIECES DETAIL screen appears.

```
                 Online Catalogue PIECES DETAIL - MULTIPART
Local Control #:  10006223                             Format  : BK
Status     : Not Available
Title      : The new encyclopaedia Britannica
Author     : Encyclopaedia Britannica, inc.
Updated By :                  Patron  :              Last out:
Update Date:                  Due Date:              Created :
Inventory  :                  Due Time:              Circ Cnt: 0 (0)
** New record **
 1. Barcode     : 39999123589
 2. Current Locn : ??
 3. Owning Locn  : AL CENTRAL GENERAL
 4. Volume/Part# :
 5. Bound Label  :
 6. Pend.Action  :                    11. Physical Cond.:
 7. Circ. Code   : LCGEN=GENERAL COLLE 12. Accession #   :
 8. Statistics   :                        Current PO#   :
 9. Actual Cost  :
10. Public note 1:




Enter "??" to see the location summary or "C" to change location information.
```

5. Enter a barcode.

6. At the *Current Locn* field enter `??`. The LOCATION COPY
   SUMMARY screen appears.

```
           LOCATION COPY SUMMARY                        MASTER

LCN     :10006223   Call #: AE5.E363 1995          ISSN:
Title   :The new encyclopaedia Britannica
Imprint :Chicago : Encyclopaedia Britannica, c199+    LCCN: 93073891

     Physical Location    Collection/Call number/Copy    Format
     -----------------    --------------------------    ------
 1.  ADVLIB Central       GENERAL                       not defined




1 item(s) in list.
Options:
 Retrieve #  # item   Add item   Limit list   Quit holdings   ? Help
 Exit
```

7. Use the *Retrieve #* option to select a location and paste the information in the *Current Locn* field on the PIECES DETAIL screen. The PIECES DETAIL screen appears when you <Enter>.

    Use the *Add item* option if:

    • no entries appear on the LOCATION COPY SUMMARY screen, or

    • if the location you want does not appear in the list.

```
             Online Catalogue PIECES DETAIL - MULTIPART
Local Control #:  10006223                          Format  : BK
Status     : In Library
Title      : The new encyclopaedia Britannica
Author     : Encyclopaedia Britannica, inc.
Updated By :                Patron  :               Last out:
Update Date:                Due Date:               Created :
Inventory  :                Due Time:               Circ Cnt: 0 (0)
** New record **
 1. Barcode      : 39999123589
 2. Current Locn : AL CENTRAL GENERAL
 3. Owning Locn  : AL CENTRAL GENERAL
 4. Volume/Part# : ??
 5. Bound Label  :
 6. Pend.Action  :                      11. Physical Cond.:
 7. Circ. Code   : LCGEN=GENERAL COLLE 12. Accession  #   :
 8. Statistics   :                          Current PO#   :
 9. Actual Cost  :
10. Public note 1:



Enter ?? to browse the linked parts
```

8. Enter the owning location information. (You can change the default information by entering C. A window opens.)

9. At the *Volume/Part#* field enter ??. You cannot make any other entry at this field because it is a linking field only, not a data entry field. The LINKED PARTS screen appears and displays the parts that make up this piece.The screen will be blank if there are no linked parts.

```
                   LINKED PARTS                               MASTER

LCN      :10006223   Call #: AE5.E363 1995              ISSN:
Title    :The new encyclopaedia Britannica
Imprint  :Chicago : Encyclopaedia Britannica, c199+        LCCN: 93073891

     Part Number           Type of Holding
     -----------           ---------------




0 item(s) in list
Options:
 Link   Unlink item(s)   Accept   Limit list   Quit holdings   ? Help
 Exit
```

10. Select *Link* to go to the LINK PARTS TO PIECE screen.

This screen shows you all of the parts that have been created for this title. Under the column *Barcoded*, the Y signifies that the part is already linked to a piece for the location defined in the Piece record and N means that the part is not yet linked to a piece. Under the column *Link?*, the Y signifies that the part is linked to the current piece that you are adding/editing. If the part you want does not appear, see *Adding Parts* on page 3-15.

```
                LINK PARTS TO PIECE                           MASTER

LCN      :10006223   Call #: AE5.E363 1995              ISSN:
Title    :The new encyclopaedia Britannica
Imprint  :Chicago : Encyclopaedia Britannica, c199+        LCCN: 93073891

     Part number       Type            Status         Barcoded  Link?
     -----------       ----            ------         --------  -----
 1.  CD.2              Multipart CD-ROM   Received       N         N




1 item(s) in list
Options:
 Retrieve item(s)   # item   Insert at line #   Mark item(s)   Limit list
 Quit holdings   ? Help   Exit
```

11. Select *Retrieve item(s)*. You can select more than one item by listing numbers separated by commas or indicating a range separated by a dash. When you <Enter> the LINKED PARTS screen appears.

Adding Parts

```
          LINK PARTS TO PIECE                           MASTER

 LCN     :10006223   Call #: AE5.E363 1995            ISSN:
 Title   :The new encyclopaedia Britannica
 Imprint :Chicago : Encyclopaedia Britannica, c199+    LCCN: 93073891

      Part number       Type               Status        Barcoded  Link?
      -----------       ----               ------        --------  -----
  1.  CD.2              Multipart CD-ROM   Received       N          N




 1 item(s) in list
 Options: 1
  Retrieve item(s)   # item   Insert at line #   Mark item(s)   Limit list
  Quit holdings   ? Help   Exit
```

a. If you cannot find a part with the correct numbering in the list or if the list is empty, choose the *Insert at line #* option to create a new part. Normally, you want the list of numbered parts to appear in descending order. Most of the time, you will insert the new part at line 1. When you insert a new part the system displays the PARTS DETAIL screen.

Mark/Unmark items Option

Use this option when you want to link items from more than one screen. When you choose *Mark item(s)*, the system re-paints the option line with the *Retrieve* and *Unmark* options. It also removes the *Retrieve item(s)* option from the option line. You can then mark as many items as you want from as many screen as you need. If you make a mistake, the *Unmark* option clears what you have marked. When you are done marking items, use the *Retrieve* option to link the items and return to your detail screen.

```
          PARTS DETAIL                                    MASTER

LCN      :10006223   Call #: AE5.E363 1995          ISSN:
Title    :The new encyclopaedia Britannica
Imprint  :Chicago : Encyclopaedia Britannica, c199+     LCCN: 93073891


** New record **
1. Type of Holding    : Multipart CD-R  8. Title        :
2. Publication Pattern : CD.             9. Copyright Fee :
3. Enumeration/Chronology :             10. Gregorian Year:
   CD.    : 2


4. Alternate Enumeration/Chronology :

5. Status :
6. Barcode:
7. Nonpublic notes:


Enter "??" to see the type of holding summary or "C" to change information
```

b. The system provides default field information from the last part defined. Edit the information for the new parts record, for example, increment the part number by one. *File*. The LINKED PARTS screen appears. The new part is now linked to the barcode.

To edit the Type of Holding or Publication Pattern enter C in the appropriate field.

If all the fields are blank, you must define the Type of Holding and the Publication Pattern. Enter ?? in the respective field. You can retrieve an existing record or use the *Add item* option to define a new one. See *Editing or Adding Type of Holding Records* on page 3-28 and *Editing or Adding Publication Pattern Records* on page 3-33.

```
          LINKED PARTS                                      MASTER

LCN      :10006223   Call #: AE5.E363 1995           ISSN:
Title    :The new encyclopaedia Britannica
Imprint  :Chicago : Encyclopaedia Britannica, c199+      LCCN: 93073891

     Part Number          Type of Holding
     -----------          ---------------
 1.  CD.3                 Multipart CD-ROM - ISS
     Title:




1 item(s) in list
Options:
 # item   Link   Unlink item(s)   Accept   Limit list   Quit holdings
 ? Help   Exit
```

12. Select *Accept*. The linked part appears in the *Volume/Part#* field. (If you *Exit*, the system returns you to the PIECES DETAIL screen and the *Volume/Part#* field remains unchanged.

NOTE: Use the *Unlink item(s)* option to remove the attachment of a part to a barcode. The system does not allow you to unlink all parts. This would essentially change the multipart to a single-part. If you want to remove all parts, delete the Location Copy Record and re-define the title as a single-part.

```
             Online Catalogue PIECES DETAIL - MULTIPART
Local Control #:  10006223                          Format  : BK
Status     : In Library
Title      : The new encyclopaedia Britannica
Author     : Encyclopaedia Britannica, inc.
Updated By :                   Patron  :            Last out:
Update Date:                   Due Date:            Created :
Inventory  :                   Due Time:            Circ Cnt: 0 (0)
** New record **
 1. Barcode      : 39999123589
 2. Current Locn : AL CENTRAL GENERAL
 3. Owning Locn  : AL CENTRAL GENERAL
 4. Volume/Part# : CD.3
 5. Bound Label  :
 6. Pend.Action  :                     11. Physical Cond.:
 7. Circ. Code   : LCGEN=GENERAL COLLE 12. Accession #   :
 8. Statistics   :                         Current PO#   :
 9. Actual Cost  :
10. Public note 1:

Options:
 # line   Line by line   Notes display   File   Delete   Binding entry
 Circ usage   Status   Print   Card print   Additional parameters
 Quit holdings   ? Help   Exit
```

13. If you do not want to use the information in the *Volume/Part#* field on spine labels, enter the appropriate information in the *Bound Label* field. If no information appears in this field the system attempts to print **all** the data in field 4 onto the spine label.

14. Complete the PIECES DETAIL screen and *File*.

    The system prompts:

    Update owning info from current info (Y/N) ? :

    If you answer Yes, the owning and current information will be the same on the piece.

15. The PIECES SUMMARY screen appears.

```
            PIECES SUMMARY                               MASTER

LCN     :10006223  Call #: AE5.E363 1995                ISSN:
Title   :The new encyclopaedia Britannica
Imprint :Chicago : Encyclopaedia Britannica, c199+      LCCN: 93073891

      Pieces key      Location Information  Current Status   Numbering   Notes
      ----------      -------------------   --------------   ---------   -----
 1.  39999123589      ADVLIB Central        Available        CD.3        N
                      GENERAL




1 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

16. Use the *Go to* option and choose the *OPAC display* option.

```
                    Online Catalogue - BRIEF DISPLAY        (1 of 1 titles)
Local Control # :10006223
LCCN            :93073891
AUTHOR          :Encyclopaedia Britannica, inc.
TITLE           :The new encyclopaedia Britannica
Pub/Size        :Encyclopaedia Britannica, 29 cm.

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.  ADVLIB Central GENERAL
     Multipart CD-ROM: CD.2 CD.3




1 item(s) in list.
Options:
 Full display   # item   Exit
```

The new part displays in the Online Catalogue.

Deleting Pieces

Pieces can be deleted by using the *Delete item(s)* option on the PIECES SUMMARY screen or the *Delete* option on the PIECES DETAIL screen.

Warning Messages   ADVANCE prevents you from deleting pieces under certain circumstances described in the following table.

Message	Reason Piece Cannot be Deleted
`item is part of a Revolving Collection`	The item is part of a revolving collection and cannot be deleted until the revolving collection returns to the assembly point and the collection is dissolved.
`item CANNOT be deleted with the current status`	The item's update flag is set to cannot update. Change the update status flag in Item Status Control Codes (CIS) or Item Action Control Codes (CIA).
`item is Bound-with slave. Use [Binding Entry] option to delete`	The item is part of a bound collection and cannot be deleted.
`item is Bound-with Master. Use [Binding Entry] option to delete`	The barcode represents a bound volume and cannot be deleted.
`item record is not in the LOCCPY file`	The barcode was not found or is not a valid barcode.
`item has a hold and cannot be deleted`	There is an outstanding hold on the item and it cannot be deleted.
`item is checked out and cannot be deleted`	The item must be checked in before it can be deleted.
`item is in RBR and cannot be deleted`	The item is in the Reserve Book Room. It cannot be deleted until the status is changed.
`item cannot be deleted. Item has not been removed from the RBR course`	The item is required for a course that maintains a list of items to be retained in the Reserve Book Room.

Modifying Multipart Holdings

This section describes:

- editing or adding the Location Copy Record

- editing or adding the Type of Holding Record

- editing or adding the Publication Pattern Record

- editing or adding the Parts Record.

Editing or Adding Location Copy Records

At least one Location Copy record must always exist for each holdings record in the database. The primary purpose of the record is to identify where a title is held. There is one Location Copy record for each unique location, physical format and copy held by the library. You can have as many Location Copy records as needed. See *Location Copy Records* on page 7-21.

Location Copy records are based on Institution (mandatory), Sublocation, and Collection Codes. You should define these codes before you create Location Copy records. Use the HOLDING SETUP MENU (CHSM) on the CATALOGUING HOLDINGS MENU to define the codes.

Location Copy records can be created:

- directly from the LOCATION COPY SUMMARY screen

- from the *Current Locn* field on the PIECES DETAIL screen

- from the SERIAL COPY SET DETAIL screen.

The LOCATION COPY SUMMARY screen lists all the defined locations. If no locations appear, you must define them.

Access

From within Holdings edit select the *Locations display* option. The LOCATION COPY SUMMARY screen appears. The LOCATION COPY SUMMARY screen lists all the locations defined for the title. If no locations appear or you need to create a new location, choose the *Add item* option.

```
               LOCATION COPY SUMMARY                        MASTER

 LCN     :10003651   Call #: AE5.E363 1986              ISSN:
 Title   :The New Encyclopaedia Britannica
 Imprint :Chicago : Encyclopaedia Britannica, c198+     LCCN: 85080367

      Physical Location    Collection/Call number/Copy    Format
      -----------------    --------------------------     ------




 0 item(s) in list.
 Options:
  # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
  Quit holdings   ? Help   Exit
```

Adding Records

Select the *Add item* option from the LOCATION COPY SUMMARY
screen. The LOCATION COPY DETAIL screen appears. The message **
New record ** appears above the numbered fields. The system
provides default values for the Institution, Sublocation, and Collection
codes. These values are defined in the Port Definitions (PORT) record on
the System Utility Menu. You can change any code by entering ?? to
browse a list or by entering a valid code for the selected field.

```
            LOCATION COPY DETAIL                        MASTER

LCN      :10003651   Call #: AE5.E363 1986              ISSN:
Title    :The New Encyclopaedia Britannica
Imprint  :Chicago : Encyclopaedia Britannica, c198+     LCCN: 85080367


** New record **
 1. Institution    : AL=ADVANCE Libra  9. Coded Location    :
 2. Sublocation    : CENTRAL=Central  10. Non-coded Location :
 3. Collection code : GENERAL=General  11. Classification src.:
 4. Call # prefix  :                   12. Shelving Title     :
 5. Call number    :                   13. Copyright fee code :
 6. Call # suffix  :                   14. Materials specified:
 7. Copy number    : 2                 15. Placeholder only   : N
 8. Retention policy: 0                16. Physical format    :




Options:
 # line   Line by line   Holdings statement   MARC Holdings
 Binding information   File   Delete   Quit holdings   ? Help   Exit
```

Edit the numbered fields. Add as many records as required for all copies
of the set. This includes locations that will hold incomplete sets, that is
some of the parts and not all. *File.* The LOCATION COPY SUMMARY
screen appears. The new locations are listed.

Adding Location Records from the PIECES DETAIL screen

```
                Online Catalogue PIECES DETAIL - MULTIPART
Local Control #:  10001761                         Format  : BK
Status     : In Library
Title      : The New Encyclopaedia Britannica
Author     :
Updated By :                 Patron   :            Last out:
Update Date: 06/09/98  02:58pm Due Date:           Created : 06/09/98
Inventory  :                 Due Time:            Circ Cnt: 0 (0)

 1. Barcode     : 39999000291
 2. Current Locn : ??
 3. Owning Locn  : AL CENTRAL GENERAL AE5. E363 LCGEN
 4. Volume/Part# : Pt.A(JUN 1996 )
 5. Bound Label  :
 6. Pend.Action  :                    11. Physical Cond.:
 7. Circ. Code   : LCGEN=GENERAL COLLE 12. Accession #   :
 8. Statistics   :                        Current PO#   :
 9. Actual Cost  :
10. Public note 1:



Enter "??" to see the location summary or "C" to change location information.
```

If you enter ?? at the *Current Locn* field on the PIECES DETAIL screen the LOCATION COPY SUMMARY screen appears. Use the *Add item* option to add a new location copy record.

If you enter C at the *Current Locn* field on the PIECES DETAIL screen the LOCATION COPY DETAIL screen appears. You can edit the record to create a new location copy record.

Using *# item* to Select a Record to Edit

```
                LOCATION COPY SUMMARY                        MASTER

 LCN     :10001761   Call #: AE5.E363 1979              ISSN:
 Title   :The New Encyclopaedia Britannica
 Imprint :Chicago : Encyclopaedia Britannica, c197+     LCCN: 77094292 //r8

      Physical Location      Collection/Call number/Copy    Format
      -----------------      --------------------------     ------
  1.  ADVLIB Central         GENERAL AE5. E363 c.5          not defined
  2.  ADVLIB Landover        GENERAL AE5. E363              not defined
  3.  MAIN BRA1              GEN1                           not defined


3 item(s) in list.
 Options:
  # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
  Quit holdings   ? Help   Exit
```

Use the *# item* option to select a record to edit. The LOCATION COPY
DETAIL screen appears.

```
                LOCATION COPY DETAIL                        MASTER

 LCN     :10001761   Call #: AE5.E363 1979              ISSN:
 Title   :The New Encyclopaedia Britannica
 Imprint :Chicago : Encyclopaedia Britannica, c197+     LCCN: 77094292 //r8


  LOCCPY key :  10031868
  1. Institution    : AL=ADVANCE Libra  9. Coded Location   :
  2. Sublocation    : CENTRAL=Central  10. Non-coded Location :
  3. Collection code : GENERAL=General  11. Classification src.:
  4. Call # prefix  :                  12. Shelving Title   :
  5. Call number    : AE5. E363        13. Copyright fee code :
  6. Call # suffix  :                  14. Materials specified:
  7. Copy number    : 5                15. Placeholder only  : N
  8. Retention policy: 8               16. Physical format  :

Options:
  # line   Line by line   Pieces / Parts   Holdings statement
  MARC Holdings   Binding information   File   Delete   Quit holdings
  ? Help   Exit
```

For a description of the fields and the options see *Location Copy Detail* on page 7-23.

Pieces/Parts   When you use the *Pieces/Parts* option from the LOCATION COPY DETAIL screen, the system displays all the pieces/parts for the location you have selected.

Holdings Statement   When you use the Holdings statement option from the LOCATION COPY DETAIL screen, the system displays the summary holdings statements for the material at this location grouped by Type of Holding (issues, indexes, or supplements).

Deleting Location Copy Records

When you attempt to delete a Location Copy record, the system warns you if there are pieces/parts attached or if you are deleting the last piece from a location.

```
                    LOCCPY Deletion Error/Warning Report

        Number of records: 2
        Errors/Warnings encountered for attached PIECES record(s)
        ----------------------------------------------------------------
        Warning: Location copy at line 2 has pieces/parts attached.
        Warning - deleting *LAST* piece from : AL Landover




 1 of 1 can be deleted. Delete it (Y/N)?
```

After the warning displays the system prompts you to confirm that the record can be deleted.

Deleting the Location Copy record removes all the pieces and parts that are attached to this record. You do not have to unlink pieces or parts. The system checks the status of the piece and prevents you from deleting pieces that have certain statuses, such as checked out or if it has an outstanding hold. See *Deleting Pieces* on page 3-20.

If you delete the last Location Copy record, the system deletes the Part record, and the Piece record. The Type of Holdings and Publication Patterns remain.

Editing or Adding Type of Holding Records

Multipart holdings must have at least one Type of Holding record. The purpose of this record is to identify the type of publication associated with the multipart bibliographic item. The most common types of holdings are issues, indexes, and supplements. You can have as many Types of Holdings records as needed to describe your multiparts.

The Type of Holding record provides access to the PUBLICATION PATTERN record and PARTS records. This facilitates your workflow by allowing you to define the type of publication, the captions and labels, and parts from one record.

If you convert a single-part holding to create a new multipart holding, ADVANCE creates a Type of Holding record for the title. You should edit this record to ensure the description is correct.

Type of Holdings records are created from the TYPE OF HOLDING summary screen.

Access

From within Holdings edit select the *Type of holdings display* option. The TYPE OF HOLDING SUMMARY screen appears. The TYPE OF HOLDING SUMMARY screen lists all the types of holdings defined for the title. If no types of holdings appear or if you need to create a new item to describe the parts you are receiving, choose the *Add item* option.

```
             TYPE OF HOLDING SUMMARY                        MASTER

LCN     :10001761   Call #: AE5.E363 1979            ISSN:
Title   :The New Encyclopaedia Britannica
Imprint :Chicago : Encyclopaedia Britannica, c197+      LCCN: 77094292 //r8

    Description                     Type   Supplement/Index type
    -----------                     ----   --------------------
 1. Multipart set                   ISS
    Captions/Labels: Pt.:(Date)




1 item(s) in list
Options:
 # item   Add item   Delete item(s)   Sequence TOHs   Move #(s)   Go to
 Limit list   Quit holdings   ? Help   Exit
```

Adding Records

Select the *Add item* option from the TYPE OF HOLDING SUMMARY screen. The TYPE OF HOLDING DETAIL screen appears.

```
                 TYPE OF HOLDING DETAIL                    MASTER

LCN     :10001761   Call #: AE5.E363 1979              ISSN:
Title   :The New Encyclopaedia Britannica
Imprint :Chicago : Encyclopaedia Britannica, c197+     LCCN: 77094292 //r8


1. Description       : Annual Cumulation    3. Publication Type: 0  - ISS
2. Supplement/Index Type:

Enumeration       Level 1    Level 2    Level 3   Level 4  Level 5  Level 6
 Caption       :
 Alternate Caption:

Chronology        Level 1    Level 2    Level 3   Level 4
 Caption       : (Year)
 Alternate Caption:
Frequency : a  - Annual
Notes     :

Options:
 # line   Line by line   Patterns   Parts   Delete   File   Quit holdings
 ? Help   Exit
```

Edit the numbered fields. *File.* The TYPE OF HOLDING SUMMARY screen appears.

NOTE: Before you *File*, use the *Patterns* and *Parts* options to complete the definition of your title.

Using *# item* to Select a Record to Edit

```
            TYPE OF HOLDING SUMMARY                    MASTER

LCN     :10001761   Call #: AE5.E363 1979            ISSN:
Title   :The New Encyclopaedia Britannica
Imprint :Chicago : Encyclopaedia Britannica, c197+    LCCN: 77094292 //r8

    Description                  Type  Supplement/Index type
    -----------                  ----  --------------------
 1.  Multipart set               ISS
     Captions/Labels: Pt.:(Date)
 2.  Annual Cumulation           ISS
     Captions/Labels: Vol.:(year)




2 item(s) in list
Options:
 # item   Add item   Delete item(s)   Sequence TOHs   Move #(s)   Go to
 Limit list   Quit holdings   ? Help   Exit
```

Use the *# item* option to select a record to edit. The TYPE OF HOLDING
DETAIL screen appears.

```
                  TYPE OF HOLDING DETAIL                       MASTER

LCN     :10001761  Call #: AE5.E363 1979              ISSN:
Title   :The New Encyclopaedia Britannica
Imprint :Chicago : Encyclopaedia Britannica, c197+      LCCN: 77094292 //r8


1. Description        : Annual Cumulation    3. Publication Type: 0  - ISS
2. Supplement/Index Type:

Enumeration       Level 1     Level 2    Level 3   Level 4  Level 5  Level 6
 Caption      :
 Alternate Caption:

Chronology        Level 1     Level 2    Level 3   Level 4
 Caption       : (Year)
 Alternate Caption:
Frequency : a  - Annual
Notes     :

Options:
 # line   Line by line   Patterns   Parts   Delete   File   Quit holdings
 ? Help   Exit
```

For a description of the fields and the options see *Type of Holding Detail* on page 7-42.

Patterns Displays the PUBLICATION PATTERN SUMMARY screen. Use the *Add item* option to define a new pattern. Use the *# item* option to edit an existing pattern.

Parts Displays the PARTS SUMMARY screen. Use the *Insert at line #* option to define a new part. If no parts appear, use the *Insert at line #* 1 to add a new part. (Normally, you want the list of numbered parts to appear in descending order. Most of the time, you will insert the new part at line 1.)

Deleting Type of Holding Records

When you attempt to delete a Type of Holding record, the system tells you if the record can be deleted, or warns you if there are pieces/parts attached. ADVANCE warns you if a piece is associated with the Type of Holding record. If the piece has a status that doesn't permit deletion (for example, checked out), an error message is displayed and you will not be able to delete the Type of Holding record.

```
                  TYPE OF HOLDING SUMMARY                        MASTER

 LCN     :10001761   Call #: AE5.E363 1979                ISSN:
 Title   :The New Encyclopaedia Britannica
 Imprint :Chicago : Encyclopaedia Britannica, c197+       LCCN: 77094292 //r8

     Description                       Type  Supplement/Index type
     -----------                       ----  --------------------
 1.  Multipart set                     ISS
     Captions/Labels: Pt.:(Date)
 2.  Annual Cumulation                 ISS
     Captions/Labels: Vol.:(year)


 2 item(s) in list


1 of 1 can be deleted. Delete it (Y/N)?
```

After the warning displays the system prompts you to confirm that the record can be deleted.

```
                    TOH Deletion Error/Warning Report

     Number of records: 2
     Errors/Warnings encountered for attached PIECES record(s)
     ----------------------------------------------------------------
     PIECES errors/warnings encountered for TOH record at line 1
     --> 39999000107395 - item CANNOT be deleted with the current stat




 Options:
  ? help   Exit
```

NOTE: If you delete the last Type of Holding record, all the associated holdings records for this bibliographic record will also be deleted: Location Copy, Parts, Piece, Publication Pattern, and Serial Copy Set records. The option line at the Type of Holding Summary screen is reset to include only the options: *OPAC display, Single-part, Multipart/serial, Bibliographic edit, Order display, Exit*.

Editing or Adding Publication Pattern Records

For multipart titles, Publication Pattern records are most commonly used to define the enumeration and chronology (captions or labels). Publication prediction is not generally done for multiparts.

Enumeration — Numbering that identifies an issue of a serial — e.g., "Vol.3 Pt.A".

Chronology — Date that identifies an issue of a serial — e.g., "June 1998".

Publication Pattern — Publication Patterns are based on the Type of Holding: issues, indexes, or supplements. You can have any number of publication patterns. For example, if you have multiple formats and differing receipt dates you can define a Publication Pattern for each combination.

Publication Patterns have either an active or inactive status. Filing a new version of an old pattern causes the old pattern to become inactive and the new pattern active. You cannot assign a status to a pattern; the system assigns the status.

Access

From within Holdings edit select the *Pub. pattern display* option. The PUBLICATION PATTERN SUMMARY screen appears. This screen lists all the patterns defined for the title. If no patterns appear or you need to create a new pattern, choose the *Add item* option.

If you access the PUBLICATION PATTERN SUMMARY screen from the TYPE OF HOLDING record you see only the patterns defined for that specific type of holding.

```
              PUBLICATION PATTERN SUMMARY                    MASTER

LCN      :10005009   Call #: AE5.E363 1992                ISSN:
Title    :The New encyclopaedia Britannica
Imprint  :Chicago : Encyclopaedia Britannica, c199+       LCCN: 90084190

     Enumeration/Chronology    Frequency     Description
     ---------------------     ---------     -----------
 1.  Pt.                                     Multi-volume set
 2.  V.                                      Multi-volume Set
 3.  Sec.                                    INDEX
 4.  CD.                                     Multipart CD-ROM
 5.  Disk.                                   Multipart CD-ROM
 6.  Dk.                                     Multipart CD-ROM


6 item(s) in list
Options:
 # item   Add item   Delete item(s)   Go to   Limit list   Quit holdings
 ? Help   Exit
```

Adding Records

Select the *Add item* option from the PUBLICATION PATTERN
SUMMARY screen. The PUBLICATION PATTERN DETAIL screen
appears.

```
               PUBLICATION PATTERN DETAIL                    MASTER
                                            (1 of 1 Publication Patterns)
LCN      :10005009   Call #: AE5.E363 1992            ISSN:
Title    :The New encyclopaedia Britannica
Imprint  :Chicago : Encyclopaedia Britannica, c199+      LCCN: 90084190
Publication Type:ISS - Multi-volume set                      ** ACTIVE **
1. Enumeration       Level 1     Level 2    Level 3   Level 4  Level 5 Level 6
   Caption/Label   : Pt.
   Number of Parts :
   Numbering Code  :
2. Chronology        Level 1     Level 2    Level 3   Level 4
   Caption/Label   :
   Code            :
3. Copy Caption    : c.
4. Ind/Supp Caption:                            Associated Level:
5. Frequency Code  :                         6. Auto Prediction : Y
7. Regularity Pattern:



8. Date Range      :
Options:
 # line   Line by line   Second screen   Predictions   MARC   Delete   File
 Quit holdings   ? Help   Exit
```

Edit the numbered fields. For multipart holdings that are not under serials control, the *Enumeration* and *Chronology* fields are the only fields that need to be edited (only the caption/label). *File*.

The system prompts:

```
Is this publication pattern going to be used to predict
issues?
```

Answer Y or N.

Y   Answer Yes for serials only.

N   Answer No for multiparts.

If this is a new publication pattern the system prompts:

```
Can holdings data for this publication pattern be
compressed?
```

Answer `Y` or `N`..

> `Y`   Displays parts in a range to the OPAC user, for example, v.1-v.5.

> `N`   Displays parts individually to the OPAC user, for example, v.1 v.2 v.3 v.4 v.5.

If you are editing an existing publication pattern the system prompts:

```
Do you want to retain the old record ? (Y/N)
```

Answer `Y` or `N`.

> `Y`   Saves a copy of the old record. Any parts already created will retain the old label information. The system then creates a new pattern record with new labels. These labels can then be used when you create/edit parts.

> `N`   The old parts will use the new label information.

The PUBLICATION PATTERN SUMMARY screen appears.

Using *# item* to Select a Record to Edit

```
             PUBLICATION PATTERN SUMMARY                    MASTER

LCN     :10005009   Call #: AE5.E363 1992               ISSN:
Title   :The New encyclopaedia Britannica
Imprint :Chicago : Encyclopaedia Britannica, c199+       LCCN: 90084190

     Enumeration/Chronology    Frequency      Description
     ---------------------    ---------      -----------
 1.  Pt.                                     Multi-volume set
 2.  V.                                      Multi-volume Set
 3.  Sec.                                    INDEX
 4.  CD.                                     Multipart CD-ROM
 5.  Disk.                                   Multipart CD-ROM
 6.  Dk.                                     Multipart CD-ROM


6 item(s) in list
Options:
 # item   Add item   Delete item(s)   Go to   Limit list   Quit holdings
 ? Help   Exit
```

Use the *# item* option to select a record to edit. The PUBLICATION
PATTERN DETAIL screen appears.

```
                 PUBLICATION PATTERN DETAIL                    MASTER
                                              (1 of 1 Publication Patterns)
LCN      :10005009   Call #: AE5.E363 1992              ISSN:
Title    :The New encyclopaedia Britannica
Imprint  :Chicago : Encyclopaedia Britannica, c199+       LCCN: 90084190
Publication Type:ISS - Multi-volume set                        ** ACTIVE **
1. Enumeration      Level 1     Level 2     Level 3   Level 4  Level 5 Level 6
   Caption/Label   : Pt.
   Number of Parts :
   Numbering Code  :
2. Chronology       Level 1     Level 2     Level 3   Level 4
   Caption/Label   :
   Code            :
3. Copy Caption    : c.
4. Ind/Supp Caption:                            Associated Level:
5. Frequency Code  :                     6. Auto Prediction : Y
7. Regularity Pattern:



8. Date Range      :
Options:
 # line   Line by line   Second screen   Predictions   MARC   Delete   File
 Quit holdings   ? Help   Exit
```

For a description of the fields and the options see *Publication Pattern
Detail* on page 7-49.

Second Screen   Displays the PUBLICATION PATTERN SECOND SCREEN. Allows you to
                         define frequency notes, and alternative enumeration and chronology.

Predictions   Displays the PUBLICATION PATTERN PREDICTION screen. Displays
                         predictions. You can also specify starting enumeration and chronology
                         and receipt and claim delays on this screen.

Deleting Publication Pattern Records

When you attempt to delete a PUBLICATION PATTERN record, the
system tells you if the record can be deleted, or warns you if there are
pieces/parts attached.

```
                    PUBPAT Deletion Error/Warning Report

     Number of records: 6
     Errors/Warnings encountered for attached PIECES record(s)
     -----------------------------------------------------------------
     PIECES errors/warnings encountered for PUBPAT record at line 1
     --> WARNING - 39999000250 - will be deleted.
     --> WARNING - 39999000251 - will be deleted.
     --> WARNING - 39999000253 - will be deleted.
     --> WARNING - 39999000345 - will be deleted.
     --> WARNING - 39999000256 - will be deleted.




Options:
 ? Help   Exit
```

After the warning displays the system prompts you to confirm that the record can be deleted.

```
                 PUBLICATION PATTERN SUMMARY                  MASTER

 LCN     :10005009   Call #: AE5.E363 1992              ISSN:
 Title   :The New encyclopaedia Britannica
 Imprint :Chicago : Encyclopaedia Britannica, c199+      LCCN: 90084190

      Enumeration/Chronology    Frequency      Description
      ----------------------    ---------      -----------
  1.  V.                                       Multi-volume Set
  2.  Sec.                                     INDEX
  3.  CD.                                      Multipart CD-ROM
  4.  D.                                       Multipart CD-ROM
  5.  Disk.                                    Multipart CD-ROM



  5 item(s) in list


1 of 1 can be deleted. Delete it (Y/N)?
```

Editing or Adding Parts Records

Parts information is available on the Parts Summary and Parts Detail screens.

Parts Access Point

The PARTS SUMMARY screen lists all the parts for the title including parts for all Types of Holding, Publication Patterns, and Location Copies. It does not indicate the number of each of the parts held.

The parts display differs depending on where you access the information from. If you use the *Pieces/Parts* option from the LOCATION COPY DETAIL screen, only the parts for that specific location will be displayed. If you access parts from the TYPE OF HOLDING DETAIL screen, only the parts for that specific type of holding are displayed.

Parts Screen Information

The PARTS SUMMARY screen displays the part number and type of holding information. The PARTS DETAIL screen includes the enumeration, chronology, status, barcode, and note information.

NOTE: The information displayed on the PARTS SUMMARY screen is specified on the HOLDINGS DISPLAY DEFINITION (HDD) menu on the HOLDING SETUP MENU (CHSM).

Relationship to Other Records

Parts records obtain enumeration and chronology caption information from Publication Pattern records.

Defining Parts

Once a part has been created in the system the information does not need to be re-entered. You can continue to add parts by using the PARTS DETAIL screen. This screen serves as a template where the information common to all the parts is stored, such as title, imprint, etc. By updating the enumeration and chronology new parts can be added indefinitely.

OPAC Display

Parts do not have to be barcoded. However, if the parts have not been ordered from acquisitions and are not expected, you must update the status to *Received* so that the parts display in the online catalogue. (Items without barcodes and without a status do not display in the online catalogue.)

Pieces Detail Screen

Additional volumes may be added to a multipart set from the PIECES SUMMARY screen. This is accomplished by using the linking facility provided on the PIECES DETAIL screen. The system displays all the parts linked to a barcode.

Access

From within Holdings edit select the Parts display option. The PARTS SUMMARY screen appears.

```
               PARTS SUMMARY                              MASTER

 LCN     :10003651   Call #: AE5.E363 1986            ISSN:
 Title   :The New Encyclopaedia Britannica
 Imprint :Chicago : Encyclopaedia Britannica, c198+   LCCN: 85080367

      Part Number           Type of Holding
      -----------           ---------------
 1.  Pt.A                   Multi-volume set - ISS




 1 item(s) in list
 Options:
  # item   Insert at line #   Delete item(s)   Go to   Limit list
  Quit holdings   ? Help   Exit
```

Adding Parts

The PARTS SUMMARY screen lists all the parts currently held under this title. To add more parts to the list select the *Insert at line #* option and enter the number of the line that you want to add. In this example, to continue the list enter 1.

```
                    PARTS DETAIL                                MASTER

LCN      :10003651   Call #: AE5.E363 1986               ISSN:
Title    :The New Encyclopaedia Britannica
Imprint  :Chicago : Encyclopaedia Britannica, c198+       LCCN: 85080367


 PARTS key :  10004013
1. Type of Holding    : Multi-volume s  8. Title         :
2. Publication Pattern : Pt.           9. Copyright Fee :
3. Enumeration/Chronology :            10. Gregorian Year:
   Pt.    : A


4. Alternate Enumeration/Chronology :

5. Status : Received    2/2 ;  - 06/02/98
6. Barcode:
7. Nonpublic notes:

Options:
 # line   Line by line   File   Delete   Quit holdings   ? Help   Exit
```

The system supplies default information for the *Type of Holding*, *Publication Pattern* and *Enumeration/chronology* fields.

Type of Holding

This is a linking field.

If this is a new record, type `??` to display the TYPE OF HOLDING SUMMARY screen. Use the *Retrieve #* option to change the Type of Holding definition.

If this is an existing record, type `C` to display the TYPE OF HOLDING DETAIL screen.

Publication Pattern

This is a linking field.

Type `??` to display the PUBLICATION PATTERN SUMMARY screen. Use the *Retrieve #* option to change the Publication Pattern definition. Notice that the Publication Pattern that the part is currently linked to is prefixed by **. To add a new Publication Pattern record, choose the *Add item* option.

Type `C` to display the PUBLICATION PATTERN DETAIL screen.

Enumeration/Chronology

The system displays the labels for all the enumeration and chronology fields defined on the PUBLICATION PATTERN screen for this particular publication pattern. The labels cannot be edited on the PARTS DETAIL screen; labels are edited on the PUBLICATION PATTERN screen. The system prompts you for an entry or displays the value for the last part defined.

Edit or enter the enumeration/chronology. When you *File* after this entry, the system opens the Part Location Summary window in which you can enter the location, status, barcode and notes.

Part Location Summary Screen

```
              PARTS DETAIL                                 MASTER

LCN     :10003651   Call #: AE5.E363 1986            ISSN:
Title   :The New Encyclopaedia Britannica
Imprint :Chicago : Encyclopaedia Britannica, c198+    LCCN: 85080367

PART NUMBERING: Pt.A
+---------------------------------------------------------------------+
|    CURRENT LOCATION  STATUS          DATE      BARCODE        NOTES |
|                                                                     |
|                                                                     |
|                                                                     |
|                                                                     |
|                                                                     |
|                                                                     |
|                                                                     |
|                                                                     |
|                                                                     |
|                                                                     |
+---------------------------------------------------------------------+

Options:
 # line   Line by line   Location add   Column by Column   Accept
 Add Barcodes   Notes Update   Forward   Backward   ? Help   Exit
```

Edit and Display Fields

Current Location   [Display only or blank]

Displays the location where the title is held. Use the *Location add* option if this field is blank or if you want to add a new location. The system

displays a list of existing locations. To add a new location you must go to the LOCATION COPY DETAIL screen to create a new record.

Status   [Default displayed or ?? to select from a list]

You must accept the default or select an existing status from the displayed list.

Date   System supplied. You can only edit this field if this is the next expected date.

Barcode   [21 characters]

Enter a barcode. The system supplies this information if a piece record exists.

Notes   [Y or N]

N   Prompt returns to the option line.

Y   The Part Notes Update window opens. See *Part Notes Update Screen* on page 3-46.

Options   Refers to options on Current Location Window.

Column by column   Allows you to update the Status column, the Date (only if next expected), Barcode and Notes column.

Add barcodes   Allows you to edit the barcode information.

Notes update   Positions you at the Notes column if you type Y or if you are at a field marked Y and <Enter>, the Part Notes Update window opens.

Adding Locations

Use the *Location add* option on the Part Location Summary screen to specify where the part is held. When you use the *Insert at line #* option from the PARTS SUMMARY screen the system does not provide a default location.

```
                    PARTS DETAIL                              MASTER

 LCN      :10003651   Call #: AE5.E363 1986             ISSN:
 Title    :The New Encyclopaedia Britannica
 Imprint  :Chicago : Encyclopaedia Britannica, c198+      LCCN: 85080367

 PART NUMBERING: Pt.A
 +--------------------------------------------------------------------------+
 |    CURRENT LOCATION  STATUS             DATE     BARCODE           NOTES  |
 |  1 AL CENTRAL        1  - Received      06/02/98                      N   |
 |    GENERAL c.3                                                           |
 |                                                                          |
 |                                                                          |
 |                                                                          |
 |                                                                          |
 |                                                                          |
 |                                                                          |
 |                                                                          |
 |                                                                          |
 +--------------------------------------------------------------------------+

 Options:
  # line   Line by line   Location add   Column by Column   Accept
  Add Barcodes   Notes Update   Forward   Backward   ? Help   Exit
```

When *Location add* is selected the system displays the LOCATION
COPY SELECTION screen which lists all the defined locations for the
title. The locations represent defined Location Copy records. You cannot
add more Location Copy records from the LOCATION COPY SELEC-
TION screen. (To add Location Copy records use the *Add item* option
from the LOCATION COPY SUMMARY screen.)

```
                     LOCATION COPY SELECTION

     Number of records: 5
     Please select the location copies that you want to add:
     ----------------------------------------------------------------
     1. AL CENTRAL GENERAL
     2. AL CENTRAL GENERAL
     3. AL CENTRAL GENERAL
     4. AL CENTRAL GENERAL c.2
     5. AL CENTRAL GENERAL c.3


 Options:
  # line(s)   ? Help   Exit
```

Use the *# line* option from the LOCATION COPY SELECTION screen to select a location. The system inserts the location, a received status, and the current date. The cursor is positioned at the *BARCODE* field.

Changing Status

The *Status* field can be reached:

- by using the *# line* option to select the appropriate line on the PARTS DETAIL screen,

- by using the *# line* option from the Part Location Summary screen.

The system places the cursor on the status code number. Enter another code or ?? to display a list of codes.

The numeric values displayed in the *Status* field are CHECKIN TYPE CODES that are defined on the Checkin Type (CHKT) table on the HOLDING SETUP MENU (CHSM) or the SERIALS CONTROL CODE TABLE MENU (CODM).

```
                    CHECKIN TYPE CODE - (CHKT)

       Number of records : 21
       Code  Description of code
       ----  --------------------------------------------------------------
  1.  1      Received
  2.  2      Returned
  3.  3      Claimed
  4.  4      Exp issue
  5.  5      Exp index
  6.  6      Exp suppl
  7.  7      Missing
  8.  8      In Bindery
  9.  9      Bound
 10.  10     No Action
 11.  11     Item due
 12.  12     Withdrawn
 13.  13     Microfilm
 14.  14     Microfiche

Options:
  ? Help   # line   Print   Forward   Backward   Search jump   Exit
```

Use the *# line* to select a different code. The system inserts the code and places the cursor in the *BARCODE* field.

Adding or Editing Barcodes

The *Barcode* field can be reached:

- by using the *# line* option to select the *Barcode* line on the PARTS DETAIL screen. The system places the cursor on the *STATUS* field on the Part Location Summary screen.

- by using the *Add barcodes* option from the Part Location Summary screen. The system places the cursor on the *BARCODE* field on the Part Location Summary screen.

NOTE: Using the *Barcode* field is not the most common way of adding/ changing barcodes. If you want to change the barcode you would probably be editing the Piece record.

```
              PARTS DETAIL                              MASTER

LCN     :10001761  Call #: AE5.E363 1979            ISSN:
Title   :The New Encyclopaedia Britannica
Imprint :Chicago : Encyclopaedia Britannica, c197+    LCCN: 77094292 //r8

PART NUMBERING: Pt.B(SEP)
+-------------------------------------------------------------------------+
|   CURRENT LOCATION  STATUS          DATE     BARCODE            NOTES |
|  1 AL CENTRAL        1  - Received   06/11/98                      N  |
|    GENERAL                                                           |
|                                                                     |
|                                                                     |
|                                                                     |
|                                                                     |
|                                                                     |
|                                                                     |
|                                                                     |
|                                                                     |
|                                                                     |
+-------------------------------------------------------------------------+



Enter barcode for the checkin item
```

Enter a barcode. The system positions the cursor at the *NOTES* field.

Part Notes Update Screen

The Part Notes Update screen can be reached:

- by using the *# line* option to select the *Nonpublic notes* line on the PARTS DETAIL screen.

- by using the *Notes Update* option from the Part Location Summary screen.

```
            PARTS DETAIL                                    MASTER

LCN     :10003651   Call #: AE5.E363 1986             ISSN:
Title   :The New Encyclopaedia Britannica
Imprint :Chicago : Encyclopaedia Britannica, c198+    LCCN: 85080367


Current Location : MAIN BRANCH 1 GEN1 c.4
1. Public note   : This part is on reserve until March 15.



2. Nonpublic note: Route to Revolving Collection April 15.



3. Physical cond.: Title page repaired Jan 20.



Options:
 # line   Line by line   Accept   Quit holdings   ? Help   Exit
```

Use the *# line* or *Line by line* option to add a note. A window is available if needed.

Deleting Parts

A single copy of a specific part can be deleted from:

- the PARTS DETAIL screen
- the PIECES/PARTS SUMMARY screen.
- the PARTS SUMMARY screen. If you delete parts from the PARTS SUMMARY screen you are also deleting all the linked pieces for all Location Copies.

You cannot delete parts from:

- the Part Location Summary screen.

- the PARTS SUMMARY screen if it is accessed from the *Parts* option on the TYPE OF HOLDING DETAIL screen

- the PARTS DETAIL screen if it is accessed from the *Volume/Part* field on the PIECES DETAIL screen.

4

Serials

Multipart and serial items share many similarities but serials are distinguished from multiparts by the fact that:

- claims are issued for serials

- serials are predicted.

Serial items consist of an unknown number of individual physical parts, a typical example is a journal or a periodical issued at regular or irregular intervals. ADVANCE uses up to six records to define serials:

- Location Copy record — Displayed on the Location Copy Summary and Location Copy Detail screen.

- Pieces record (if the material is barcoded) — Displayed on the Pieces Summary, Pieces Detail, and the Pieces/Parts screens.

- Type of Holding record — Displayed on the Type of Holding Summary and Type of Holding Detail screen.

- Publication Pattern record — Displayed on the Publication Pattern Summary and Publication Pattern Detail screen.

- Parts record — Displayed on the Parts Summary and Parts Detail screen.

- Serial Copy Set — Displayed on the Serial Copy Set Summary and Serial Copy Set Detail screen.

A serial item will probably use one Type of Holding record for each category of material expected on a title. In many cases, a Type of Holding record will be defined for issues, indexes and supplements. Publication patterns are defined for each Type of Holding. The Publication Pattern record defines the captions used in numbering and also defines the frequency and pattern of publication. If the publication

interval changes or if the captions change, new publication patterns can be defined and the old patterns retained.

Parts records can be created manually but for the most part this is unnecessary since the Serials Checkin process creates parts automatically.

Serials Checkin

When you begin the checkin process, the system prompts you for the SHIPTO code of the location that you are receiving the serial items for. This selection is bypassed if you only receive items for one location or if you have specified a default SHIPTO code in User Defaults (CUDEF) on the Serials Control Control Menu (CTLM). The ability to checkin serials for a specific SHIPTO code is also permission controlled. Note that a serial's SHIPTO codes are stored in its Serial Copy Set records.

When a SHIPTO code has been specified, the system displays a selection of the types of materials, based on the Type of Holding records, that you can checkin. That is, you will be asked to indicate if you are checking in issues, supplements or indexes.

You can then proceed to checkin expected items, delete items, or insert unexpected items. The system automatically creates or removes the parts records for these items.

Sequencing Holdings

You can sort holdings by type of holding or sort the parts belonging to a particular Type of Holding. You can not interfile parts from more than one type of holding.

Holdings sort in the order defined on the PARTS SUMMARY screen, usually from the most recent to the oldest. You can change the order in which holdings display by moving one or more records from the current position on the Parts Summary screen to a new position.

Creating Bound Volumes

The linking feature available from the PIECES DETAIL screen allows you to easily create bound volumes.

ADVANCE displays bound pieces in the Online Catalogue or in Holdings Statements with the label you assign.

If you want to bind together the 1995 issues and supplements, the process is very simple. From the PIECES DETAIL screen for a new piece,

type ?? in the *Volume/Part #* field and the system prompts you to retrieve one or more existing part records from a summary list to link to the new piece. After linking all of the Parts records for the issues and supplements for 1995 to the new piece, the system displays the PIECES DETAIL screen and prompts you for a BOUND LABEL (such as v.15) to identify the piece.

Location Copy Record

Serial items always have an associated Location Copy record. This record specifies one or more parts of a copy set held at a location, and might also specify one or more pieces in that copy set at that location. The Location Copy Summary screen lists the Location Copy records, therefore showing all the locations that have holdings of the serial.

The Location Copy Detail screen typically includes the institution, sublocation, collection, call number, call number prefixes and suffixes, and copy number for a specific item.

The Location Copy record stores retrospective holdings statements and holdings override notes for USMARC fields 866/867/868.

Pieces Record

A pieces record is not needed if the part is not barcoded or if the item is an electronic file.

Pieces records contain the barcode, circulation and inventory control information. The Pieces Summary screen lists all the barcoded items for a specific title. The Pieces Detail screen displays current and owning location along with other circulation information.

A piece can consist of several parts that belong to different Types of Holdings but each Part must belong to the same Location Copy. For example, you could have a piece that consists of three volumes and an index, defined by two Type of Holding records one for issues and one for an index. But, each part that you are linking would be linked to the same Location Copy Record.

A piece may also consist of a bound volume, such as all the monthly issues for 1997 bound together. In this case, the summary holdings statement would not display the individual parts.

The Pieces record is equivalent to each unique instance of subfield p in the 852/863/864/865 USMARC fields.

Type of Holdings Records

Type of Holdings records categorize the material being described. The most common definitions are: issues, supplements, and indexes. You can define as many Type of Holdings records as you need; for example, you may define a category for bound volumes. Type of Holdings records also provide access to Publication Pattern(s) and Parts records.

Type of Holdings records allow you to define different prediction patterns for similar categories of material that have dissimilar prediction patterns and/or labelling. For example, you may receive the same publication in microfiche and paper parts. ADVANCE allows you to predict microfiche copies using one Publication Pattern while the paper copies use a second Publication Pattern.

Type of Holdings records are equivalent to a unique combination of the 007 field and the o subfield of the 853/854/855 USMARC field.

Type of Holding and Checkin

Before you checkin serials, the system prompts you specify the SHIPTO Code that you are receiving material for. (You will not be prompted for this information if you receive material for one SHIPTO address only, or if a default SHIPTO Code has been specified in User Defaults (CUDEF) on the Serials Control Control Menu.)

When a SHIPTO Code is specified, the system prompts you for the Type of Holding that you are checking in. You will not be prompted for a Type of Holding if there is only one Type of Holding defined for the title.

Publication Pattern Records

For serials, Publication Pattern records define the labels, captions and the frequency and regularity of publication.

You can define as many Publication Patterns as you want. The pattern that the system is using is marked ** ACTIVE ** on the Publication Pattern Detail screen. There can be any number of active or inactive patterns retained on the system. For example, you may have several active patterns representing issues in more than one format and likewise indexes and supplements in paper, microfiche and electronic formats. A pattern becomes active when it is filed.

ADVANCE allows you to define regularity patterns that are regular, irregular, or erratic. You can create a pattern for erratic publications by entering the dates when the item will be issued.

Viewing Publication Pattern Records	When you select the *Pub. Pattern display* option from Holdings edit, the system displays all the publication patterns for all the item's types of holdings, for example, issues, supplements, and indexes. In contrast, when you look at a Publication Pattern from a Type of Holding record, that is, use the *Patterns* option from the Type of Holding Detail screen, you see the Publication Patterns for that specific Type of Holding, for example, issues only.

Parts Records

The Parts Summary screen displays all the parts records that have been created for a bibliographic item. A parts record is created for each individual part in the copy set.

For serials, Parts records can be created manually, but in most instances the system creates a record for you when the part is checked in. Parts are created when an expected item is received or a part is inserted (a checkin box is added for an unexpected item).

Parts Records are equivalent to an 863/864/865 in uncompressed format.

Parts Detail Record	The Parts Detail screen provides links to the Type of Holding and Publication Pattern records. The actual values for the Enumeration and Chronology fields are specified on the Parts Detail screen. Status, location, and barcode information can be entered or updated on this screen.

When the *Retrieve #* option is used from the Serials Checkin screen the Parts Detail screen is displayed but the screen title is CHECKIN FOR (SHIPTO CODE) - (TYPE OF HOLDING), for example, CHECKIN FOR SHP1 - Issues.

Viewing Parts Records	When you select Parts display from Holdings edit, the system displays all the item's parts for all types of holdings.

If you use the *Parts* option from the Type of Holdings Detail screen, only the parts that belong to that type of holding are displayed.

If you access parts from the Pieces Detail screen by entering ?? in the *Volume/Part#* field, the system lists all the parts that are linked to the specific barcode shown on the Pieces Detail screen.

From the LINKED PARTS screen, if you use the *Link* option, the system displays the LINK PARTS TO PIECES screen. This screen displays all the parts belonging to this title for the piece's location. This screen also displays the current status for each part, a Y/N flag specifying whether

the part is linked to a barcode (piece), and a field indicating whether the part is linked.

Serial Copy Set Record

In most cases, serial copy sets are ordered in Acquisitions and there is no need to add them manually. However, the Serial Copy Set Summary screen does provide the means to manually add a copy set if that is necessary.

The Serial Copy Set Record represents a subscription for one copy of a title. It also defines the vendor/supplier and specifies, by means of the SHIPTO Code, where the parts are received by the library. The Serial Copy Set record is linked to the Location Copy record through the Location field where the institution and sublocation are displayed. A link to acquisitions is retained through the current purchase order number field.

Type of Holdings records are linked to the Serial Copy Set record from the *Type of holdings* option on the Serial Copy Set Detail screen.

Routing lists can be defined from the Serial Copy Set Detail using the *Routing list* option.

Ordering Serials in Acquisitions

When serial items are ordered in Acquisitions from an existing order, ADVANCE creates a Type of Holding record. When parts are received in serials checkin, Parts records are created automatically. Labels and captions, in addition to prediction and frequency patterns must be specified separately on the Publication Pattern record. Barcodes can be entered in Serials Checkin and this automatically creates a piece linked to the checked in part. Linking of multiple parts to the same piece must be done in Holdings Edit.

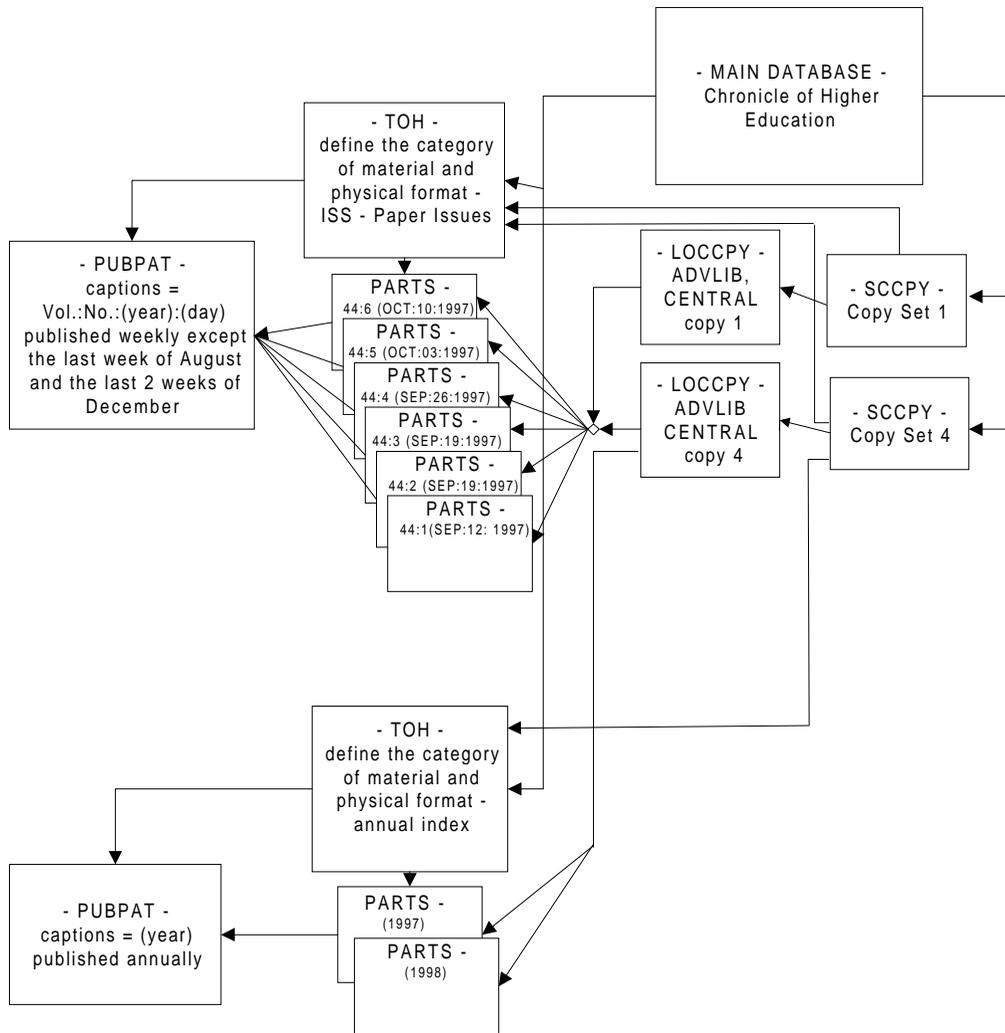### When to Use Holdings Edit for Serial Items

You need to use *Holdings edit* to:

- specify labels and captions

- define prediction and frequency patterns

- create bound volumes, or placeholders

- specify different receipt and claim delays for parts based on SHIPTO location

- define binding lists

- support different expected dates for different SHIPTO location

- specify multiple prediction patterns for a title

- move parts to a new or a different location

- move parts to another bibliographic record

- add another physical format

- to create new copy sets that have not been ordered through acquisitions

Serial Example

In this example, the title "Chronicle of Higher Education" is a serial with two subscriptions that are defined by the two Serial Copy Set records (SCPY boxes 1 and 4). The subscription for copy set 4 includes issues and annual indexes. The subscription for copy set 1 includes only issues. Each category of material, issues and indexes, is defined by a Type of Holding (TOH) record. A separate publication pattern is created for the issues and indexes from the Type of Holding (TOH) record. Each copy set is defined by its own Location Copy Record even though each set shares the same Institution, Sublocation, and Collection. The copy sets differ only in copy number. The actual holdings consist of issues or indexes identified by parts records. Parts records are defined once and "shared" by both copy sets.

- MAIN DATABASE -
Chronicle of Higher Education

- TOH -
define the category
of material and
physical format -
ISS - Paper Issues

- PUBPAT -
captions =
Vol.:No.:(year):(day)
published weekly except
the last week of August
and the last 2 weeks of
December

- LOCCPY -
ADVLIB,
CENTRAL
copy 1

- SCCPY -
Copy Set 1

PARTS -
44:6 (OCT:10:1997)

PARTS -
44:5 (OCT:03:1997)

PARTS -
44:4 (SEP:26:1997)

PARTS -
44:3 (SEP:19:1997)

PARTS -
44:2 (SEP:19:1997)

PARTS -
44:1(SEP:12: 1997)

- LOCCPY -
ADVLIB
CENTRAL
copy 4

- SCCPY -
Copy Set 4

- TOH -
define the category
of material and
physical format -
annual index

- PUBPAT -
captions = (year)
published annually

PARTS -
(1997)

PARTS -
(1998)

OPAC Display

The following Level 4 holdings display illustrates how serials may display in the Online Catalogue. (OPAC display is user-definable.)

- the location (ADVLIB Central GENERAL) forms the primary grouping.

- within each location, the next subdivision is the Type of Holding (Annual Cumulation, General Index, or Pocket Parts).

- within the Type of Holding category, items are displayed in chonological order. Enumeration and chronology levels are separated by a colon. Non-gap and gap breaks are indicated by a semicolon and comma respectively. A continuous range is separated by a dash if the library has chosen to compress holdings. The display of this information can be suppressed by using options available from the Location Copy Holdings Statement. See *Adding Retrospective Holdings Statements* on page 4-89.

- within the Type of Holding category, the last received item is displayed on a separate line.

```
                    Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10000312
LCCN            :58002790 //r855
AUTHOR          :Massachusetts. Laws, etc.
TITLE           :Massachusetts general laws annotated, under arrangement of the
                 official General laws of Massachusetts
Pub/Size        :West Pub. Co., 27 cm.

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.  ADVLIB Central GENERAL  /Regular print
     Interim Ann. Serv.: No.5(1997:JAN)-No.8(1997:AUG)
                         Last rec'd: No.8(1997:AUG) on JAN 22, 1998
 2.  ADVLIB Central GENERAL
     Annual Cumulation: Vol.2(1993)-Vol.4(1995)
                         Last rec'd: Vol.4(1995) on JAN 22, 1998
     General Index: 1996
                    Last rec'd: 1996 on JAN 22, 1998
     Pocket Parts: 1996
                   Last rec'd: 1996 on JAN 22, 1998
2 item(s) in list.
Options:
 # item   Prior screen   Holdings edit   Extend search   Full display
 Limit list   Output   MARC   Order display   Review search   OPAC parms
 New search   Reset   ? Help
```

Holdings Compression and Expansion

When you compress holdings information you summarize the enumeration and chronology. This summary is expressed as a range. For example, if your library has v.1:iss.1, v.1:iss.2, v.1:iss.3, v.1:iss.4, v.1:iss.5, v.1:iss.6, the compressed holdings statement is: v.1:iss.1-v.1:iss.6.

For publication patterns that represent basic bibliographic units (issues) and supplementary material, holdings information may be compressed or expanded by computer algorithm. Indexes, by definition, cannot be compressed. (See *MARC Equivalents*.)

When you create a Publication Pattern record in ADVANCE, you can specify whether holdings can be expanded or compressed in the *Compress/Expand* field on the PUBLICATION PATTERN SECOND SCREEN.

The values for this field are:

0   Cannot compress or expand.

1   Can compress but not expand.

2   Can compress or expand.

3   Unknown.

This field is not available for indexes.

When 2 (Compress or expand) is selected, the holdings record that is exported from ADVANCE and that is also used to build the OPAC display can contain compressed holdings. When 2 is not selected, the holdings record will contain separate 863/4 tags for each part held by the library. For example, if your library has v.1:iss.1, v.1:iss.2, v.1:iss.3, v.1:iss.4, v.1:iss.5, v.1:iss.6, the holdings statement will be v.1:iss.1 v.1:iss.2 v.1:iss.3 v.1:iss.4 v.1:iss.5 v.1:iss.6.

MARC Equivalents   Compression and expansion corresponds to the first indicator in the 853/4 tags for basic units and supplementary material. This indicator is not defined for indexes.

Caption Evaluation

For publication patterns that represent basic bibliographic units (issues) and supplementary material, you can specify the completeness of the caption levels in the *Caption Evaluation* field on the PUBLICATION PATTERN SECOND SCREEN.

Valid values are:

0   Verified; all levels present.

1   Verified; all levels may not be present.

2   Unverified; all levels present.

3   Unverified; all levels may not be present.

This field is not defined and not prompted for indexes.

Caption evaluation information is used to create USMARC holdings records and does not influence the way that ADVANCE displays or processes holdings information.

MARC Equivalents   Caption evaluation corresponds to the second indicator in the 853/4 tags for basic units and supplementary material. This indicator in not defined for indexes.

Serials Checkin

Most requirements for handling serial items can be completed from the serials checkin screen. When you checkin an item, the system automatically creates a Parts record for it if one does not already exist.

To edit or update serials information use the *Go to* option to access the appropriate record. The *Go to* option provides access to all holdings functions.

Access to Checkin

You can reach Checkin from:

• the Checkin Menu (CHKM) in Serials Control

• the *Check-in serials* option from within Holdings edit (CEH, CEHI in any module other than OPAC).

Constraints on Access to Checkin

Access to Checkin is influenced by:

• SHIPTO Code

• Settings made in User Defaults (CUDEF) in Serials Control

• Type of Holding

• Permissions

SHIPTO Code

When you access Checkin, the system displays the SHIPTO SELECTION screen if more than one SHIPTO Code has been defined for the title (if the title has copy sets belonging to more than one SHIPTO). If a default SHIPTO Code has been specified in User Defaults (CUDEF) on the Serials Control Control Menu (CTLM), this screen will not appear. Otherwise, you must select a SHIPTO in order to continue.

```
                        SHIPTO SELECTION


     Number of records: 2
     Please select the SHIPTO location that you are receiving for:
     ----------------------------------------------------------------
  1. UNIT5   Acquisitions unit 5
  2. UNIT6   Acquisitions unit 6






Options:
 # line   ? Help   Exit
```

User Defaults   A default SHIPTO Code can be specified in the User Defaults (CUDEF) on the Serials Control Control Menu (CTLM). If a default is entered, the system bypasses the SHIPTO SELECTION screen.

```
            USER DEFAULTS                              MASTER

     USER ID                          : USER1
  1. CHECKIN SCREEN FORMAT            : 0
                      (1=LIST, 0=BOXES)
  2. PROMPT FOR COPIES AT CHECKIN OPTION: 1
                         (1=YES, 0=NO)
  3. PROMPT FOR BARCODE/NOTES AT CHECKIN: 0
                         (1=YES, 0=NO)
  4. DEFAULT SHIPTO CODE FOR CHECKIN  :  UNIT6




Options:
 Line by line   # line   File   ? Help   Exit
```

Type of Holding   The TYPE OF HOLDING SUMMARY screen displays at Checkin whenever more than one type of holding record has been defined for the title you are accessing. You must select a line number to continue.

```
                   TYPE OF HOLDING SUMMARY                        MASTER

 LCN     :10008609  Call #: UNC                        ISSN: 0009-5982
 Title   :The Chronicle of higher education
 Imprint :[Washington, etc., Chronicle of higher e+       LCCN: sf 80001055

      Description                       Type  Supplement/Index type
      -----------                       ----  --------------------
  1.  Paper                             ISS
      Captions/Labels: Vol.:No.:(Month):(Day):(Year)
  2.  Loose-Leaf                        ISS
      Captions/Labels: No.:(year):(month)



 2 item(s) in list
 Options:
  # item   Add item   Delete item(s)   Sequence TOHs   Move #(s)   Go to
  Limit list   Quit holdings   ? Help   Exit
```

Permissions   Access to serials checkin can be controlled from the Enter Access Codes
                           table (EACC) on the Systems Utilities Menu (USUM).

                           You can allow complete access to serials checkin or you can limit access
                           to specific SHIPTO Codes by specifying a SHIPTO Code in the
                           RESTRICT TO QUALIFIER column.

```
                    UPDATE MODULE ACCESS RECORD

 MODULE  : SER             NAME : Master Librarian

 1. PRIVILEGE LEVEL: 99                 4. KNOWLEDGE      : 0
 2. MENU          : SER.MM              5. SUPPRESS KEYWORD: 0
 3. USER GROUP CODE: DFLT

 6. PERMISSION DESCRIPTION                      PERMISSION  RESTRICT TO
                                                GRANTED     QUALIFIER
    Edit publication patterns                      Y
    Check in serials                               Y




 Options:
  # line   Line by line   Delete   Keyword table   File   ? Help   Exit
```

Using Checkin

Checkin Example

This example demonstrates how to use serials checkin to:

- select a SHIPTO Code

- select a Type of Holding

- checkin an item

- use the *Goto* option to create another prediction pattern

1. Access Serials Checkin by selecting the Checkin Menu (CHKM) from the SERIALS CONTROL MAIN MENU. The CHKM - BIBLIO-GRAPHIC SEARCH screen appears.

2. Enter a search request. (For more about searching, see the *Serials User's Guide*.) The SERIAL COPY SET SUMMARY screen appears.

```
          CHKM - BIBLIOGRAPHIC SEARCH                    USER1

     ENTER type of serial retrieval:

CODEN Search CODEN #s                 PO    Search order #s
T     Search titles                   TX    Search Claim transaction #s
A     Search authors                  VC    Search order vendor codes
S     Search subjects                 VN    Search order vendor names
I     Search ISBN/ISSN #s             RQ    Search order request #s
L     Search LC Card #s               LST   Retrieve last BIB accessed
TW    Search title keyword            OCLC  Search OCLC #
AW    Search author keyword           LCN   Search Local Control #
                                      C     Search Call #
     Enter option= tw=chronicle of higher




 Enter the search code and string (eg A=TWAIN), or <ENTER> to exit
```

```
                  SERIAL COPY SET SUMMARY                        USER1

 LCN     :10008609   Call #: UNC                       ISSN: 0009-5982
 Title   :The Chronicle of higher education
 Imprint :[Washington, etc., Chronicle of higher e+       LCCN: sf 80001055


       Location               SHIPTO     Status    Route list  Vendor
       --------               ------     ------    ----------  ------
  1.  ADVLIB Central GENERAL    UNIT5    Claimed   P91000170   FAXON
      c.1
      Notes: Purchase copy
  2.  ADVLIB Central GENERAL    UNIT6    Claimed   P91000171   FAXON
      c.2
      Notes: Purchase copy
  3.  ADVLIB Central GENERAL    UNIT7    Claimed   P91000169   JW&S
      c.3
      Notes: Copyright deposit 2nd copy


 4 item(s) in list
 Options:
  Check in   Holdings   Claims   Order detail   Forward   Limit list   Go to
  ? Help   Exit
```

3. Select *Check in*. The SHIPTO SELECTION screen appears.

NOTE: When you use the *Check in* option you cannot select a partic-
ular copy set from this list.

```
                         SHIPTO SELECTION


      Number of records: 3
      Please select the SHIPTO location that you are receiving for:
      ----------------------------------------------------------------
  1. UNIT5   Acquisitions Department
  2. UNIT6   Main Library
  3. UNIT7   Reference Desk






 Options:
  # line   ? help   Exit
```

4. Enter the line number of the SHIPTO location that you are receiving items for. The TYPE OF HOLDING SUMMARY screen appears.

If the SHIPTO SELECTION screen does not appear, it may be that a default SHIPTO code has been specified in User Defaults (CUDEF) on the Serials Control Control Menu (CTLM) or your permissions have been set to restrict your access to a particular SHIPTO address. Or, it may mean that serials are received at one location only.

```
              TYPE OF HOLDING SUMMARY                        USER1

LCN      :10008609  Call #: UNC                      ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

     Description                     Type  Supplement/Index type
     -----------                     ----  --------------------
 1.  Paper                           ISS
     Captions/Labels: Vol.:No.:(Month):(Day):(Year)
 2.  Supplements    SUP              ANNUAL
     Captions/Labels:y.
 3.  Indexes        IND              annual
     Captions/Labels:v.:n.:pt.:pt.:(y.):(mo.)
 4.  Looseleaf      ISS
     Captions/Labels:l.


4 item(s) in list
Options: 1
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

5. Enter the line number for the category of material that you are checking in. The Checkin screen appears.

NOTE: The TYPE OF HOLDING SUMMARY screen will not appear if there is only one Type of Holding record linked to the title. (The title may have Type of Holding records that are not linked to copy sets and these will not display here.)

```
                  CHKM - CHECKIN FOR UNIT5 - Paper                      USER1

LCN      :10008609  Call #: UNC                           ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055
._____._____._____._____.
|1 Vol.44:No.13(NOV|2 Vol.44:No.14(DEC|3 Vol.44:No.15(DEC|4 Vol.44:No.16(JAN|
|  :28:1997)      |  :05:1997)      |  :12:1997)      |  :02:1998)      |
|                 |                 |                 |                 |
|                 |                 |                 |                 |
|01/26/98         |01/26/98         |01/26/98         |01/26/98         |
|Received   4/4   |Received   4/4   |Received   4/4   |Received   4/4   |
._____._____._____._____.
|5 Vol.44:No.17(JAN|6 Vol.44:No.18(JAN|7 Vol.44:No.19(JAN|8 Vol.44:No.20(JAN|
|  :09:1998)      |  :16:1998)      |  :23:1998)      |  :30:1998)      |
|                 |                 |                 |                 |
|                 |                 |                 |                 |
|01/09/98         |01/16/98         |01/23/98         |01/30/98         |
|Exp issue  4/4   |Exp issue  4/4   |Exp issue  4/4   |Exp issue  4/4   |
._____._____._____._____.
Options:
 Checkin #   Insert after #   Retrieve #   Delete #   Forward   Backward
 Claims   Order detail   Prior screen   Frequency notes   Copy set notes
 MARC   Summary holdings   Move Box #   ? Help   Exit
```

6. Enter the number of the item you are checking in. (For more information about Checkin see the *Serials User's Guide*.)

Updating or Editing Parts Information from Checkin

If you use the *Retrieve #* option from the Checkin screen, the CHKM - (SHIPTO CODE)- (Type of Holding) screen appears, in this example the screen is entitled CHKM - CHECKIN FOR UNIT5 - Paper. This screen is the same as the Parts Detail screen. From this screen you can:

•   change the status to withdrawn, missing, in bindery, and so forth

•   change the location

•   add barcodes

•   add notes

```
             CHKM - CHECKIN FOR UNIT5 - Paper                    MASTER

 LCN       :10008609   Call #: UNC                      ISSN: 0009-5982
 Title     :The Chronicle of higher education
 Imprint   :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055
 ._____._____._____._____.
 |1 Vol.44:No.13(NOV|2 Vol.44:No.14(NOV|3 Vol.44:No.15(NOV|4 Vol.44:No.16(NOV|
 |  :28:1997)       |  :14:1997)       |  :21:1997)       |  :28:1997)       |
 |                  |                  |                  |                  |
 |                  |                  |                  |                  |
 |04/29/98          |04/29/98          |04/29/98          |04/29/98          |
 |Received   4/4    |Received   4/4    |Received   4/4    |Received   4/4    |
 ._____._____._____._____.
 |5 Vol.44:No.17(DEC|6 Vol.44:No.18(DEC|7 Vol.44:No.19(JAN|8 Vol.44:No.20(JAN|
 |  :05:1997)       |  :12:1997)       |  :02:1998)       |  :09:1998)       |
 |                  |                  |                  |                  |
 |                  |                  |                  |                  |
 |12/05/97          |12/12/97          |01/02/98          |01/09/98          |
 |Exp issue  4/4    |Exp issue  4/4    |Exp issue  4/4    |Exp issue  4/4    |
 ._____._____._____._____.
 Options:
  Checkin #    Insert after #   Retrieve #   Delete #   Forward   Backward
  Claims    Order detail    Prior screen   Frequency notes    Copy set notes
  MARC    Summary holdings    Move Box #    ? Help    Exit
```

1. From the CHECKIN screen, use the *Retrieve #* option to select the part you want to update. The system displays the parts information.

```
            CHKM - CHECKIN FOR UNIT5 - Paper                  MASTER

LCN      :10008609   Call #: UNC                    ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055


 PARTS key :  10003970
1. Type of Holding    : Paper           8. Title        :
2. Publication Pattern : Vol.:No.:(Mont 9. Copyright Fee :
3. Enumeration/Chronology :            10. Gregorian Year:
   Vol.  : 44        (Day)  : 21
   No.   : 15        (Year) : 1997
   (Month): NOV
4. Alternate Enumeration/Chronology :

5. Status : Received   4/4 ;  - 04/29/98
6. Barcode:
7. Nonpublic notes:

Options:
 # line   Line by line   File   Status History display  Quit holdings
 ? Help   Exit
```

2. Use the *# line* option to select the Status line. The system displays
    the PART LOCATION SUMMARY screen that includes location, status,
    barcode, and note information.

```
              CHKM - CHECKIN FOR UNIT5 - Paper                    MASTER

  LCN     :10008609   Call #: UNC                        ISSN: 0009-5982
  Title   :The Chronicle of higher education
  Imprint :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

  PART NUMBERING: Vol.44:No.15(NOV:21:1997)
  .-----------------------------------------------------------------------------.
  |    CURRENT LOCATION  STATUS           DATE     BARCODE            NOTES |
  |  1 AL CENTRAL        1  - Received    04/29/98                       N  |
  |    GENERAL c.4                                                          |
  |  2 AL CENTRAL        1  - Received    04/29/98                       N  |
  |    GENERAL c.3                                                          |
  |  3 AL CENTRAL        1  - Received    04/29/98                       N  |
  |    GENERAL c.2                                                          |
  |  4 AL CENTRAL        1  - Received    04/29/98                       N  |
  |    GENERAL c.1                                                          |
  |                                                                         |
  |                                                                         |
  |                                                                         |
  .-----------------------------------------------------------------------------.

  Options:
   # line   Line by line   Location add   Column by Column   Accept
   Add Barcodes   Notes Update   Forward   Backward   ? Help   Exit
```

Edit Fields

Use this window to change the status of a part from received to with-drawn for example, or to add barcodes or notes.

STATUS Enter a valid CHECKIN TYPE code or enter ?? to browse a list of codes.

BARCODE Enter a barcode number.

NOTE [Y/N]

Enter Y to open a window in which you can add public, nonpublic and physical condition notes. See *Notes Update* in the following section.

Options

 # line Allows you to edit a line by selecting a line number.

 # Line by line Allows you to edit all lines. The cursor is positioned in the first *STATUS* field, then moves horizontally to the first *BARCODE* field, and to the

NOTES field. The system continues to move the cursor in this pattern until all the fields in all the lines have been accessed.

Location add Displays the LOCATION COPY SELECTION screen which lists all the locations that have been defined for this serial copy set that do not yet have this part. You can link another location to the part by selecting a location from this list.

Column by Column Allows you to edit all the fields in a columns by column sequence. The cursor is positioned in the first *STATUS* field, then moves down vertically to the next *STATUS* field. When one column is complete the system moves the cursor to the top of the next column and continues in this pattern until all the fields have been accessed.

Add Barcodes Allows you to edit all the *BARCODE* fields. The cursor is positioned in the first *BARCODE* field and then moves down vertically through all the *BARCODE* fields.

Notes Update Allows you to edit all the *NOTES* fields. The cursor is positioned in the first *NOTES* field and then moves down vertically through all the *NOTES* fields.

To add a note, enter Y in the *NOTES* field. The system displays a window in which you can add public, nonpublic, and physical condition notes.

```
                CHKM - CHECKIN FOR UNIT5 - Paper              MASTER

 LCN      :10008609   Call #: UNC                     ISSN: 0009-5982
 Title    :The Chronicle of higher education
 Imprint  :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055


 Current Location : AL CENTRAL GENERAL c.4
 1. Public note   : Current year in Reserve Book Room.


 2. Nonpublic note: Microfiche copies available to faculty on request.


 3. Physical cond.:

Options:
   # line   Line by line   Accept   Quit holdings   ? Help   Exit
```

Select *Accept* when you complete the note.

Using the *Go to* Option from Checkin

When you exit from Checkin, the SERIAL COPY SET SUMMARY screen appears. Select the *Go to* option to access the Holdings edit functions. Some of the changes that can be made include:

- linking a type of holdings record to a specific copy set to accommodate different expected dates, and receipt and claim delays for each

- attaching a new publication pattern to a copy set

- providing the same title information for multiple formats

- editing the MARC record.

Same Publication — Multiple Formats

When the same title is available in multiple formats, you can use separate definitions of the Type of Holding record and link them to a specific copy set to define multiple formats of the same title. In this example, the copy set arrives as paper issues; now a quarterly microfiche will be linked to the copy set.

1. Obtain the SERIAL COPY SET SUMMARY screen.

```
              SERIAL COPY SET SUMMARY                     MASTER

LCN     :10008609   Call #: UNC                   ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055

     Physical Location    Collection/Call number/Copy    Vendor    Status
     ----------------     --------------------------     ------    ------
 1.  ADVLIB Central       GENERAL                        FAXON     Claimed
 2.  ADVLIB Central       GENERAL c.2                    FAXON     Claimed
     Notes: Purchase copy
 3.  ADVLIB Central       GENERAL c.3                    JW&S      Claimed
     Notes: Copyright deposit 2nd copy
 4.  ADVLIB Central       GENERAL                        FAXON     Active




4 item(s) in list
Options:
 # item   Add item   Go to   MARC   Limit list   Quit holdings   ? Help
 Exit
```

2. Enter the line number of the copy set that you want to link to a different Type of Holding record. The SERIAL COPY SET DETAIL screen appears.

```
           SERIAL COPY SET DETAIL                        MASTER

LCN      :10008609   Call #: UNC                  ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055


 1. Location    : AL CENTRAL GENERAL
 2. Status      : ACTIVE - Y
 3. Current PO# :
 4. Actual Cost :
 5. Vendor Code : FAXON
 6. Ship To     : UNIT6
 7. Clm Code    :
 8. Routing ID  :
 9. Notes       :


Options:
 # line   Line by line   Routing list   Binding list   Type of holdings
 File   Quit holdings   ? Help   Exit
```

3. Select the *Type of holdings* option. The LINKED TYPE OF HOLDING screen appears.

```
              LINKED TYPE OF HOLDING                         MASTER

LCN     :10008609  Call #: UNC                      ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

     Description                        Type  Supplement/Index type
     -----------                        ----  --------------------
 1.  Paper                              ISS
     Captions/Labels: Vol.:No.:(Date)
 2.  General Index                      IND
     Captions/Labels: (year)




2 item(s) in list
Options:
 # item   Link   Unlink item(s)   Next expected item   File   Limit list
 Quit holdings   ? Help   Exit
```

4. Select the *Link* option. The LINK TYPE OF HOLDING TO COPY SET
   screen appears.

```
             LINK TYPE OF HOLDING TO COPY SET              MASTER

LCN     :10008609   Call #: UNC                      ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

     Description                     Type  Supplement/Index type       Link
     -----------                     ----  --------------------        ----
 1.  Paper                           ISS                                Y
     Captions/Labels: Vol.:No.:(Date)
 2.  CD-ROM                          ISS                                N
     Captions/Labels: Vol.:No.:(Month):(Day):(Year)
 3.  General Index                   IND                                Y
     Captions/Labels: (year)
 4.  Issues-microfiche              ISS                                N
     Captions/Labels: v.:no.:(Year):(Qtr)
 5.  Annual Suppl.                   SUP                                N
     Captions/Labels: (Year)

5 item(s) in list
Options:
 Retrieve item(s)   # item   Add item   Mark item(s)   Limit list
 Quit holdings   ? Help   Exit
```

5. Select the *Retrieve item(s)* option and enter the line number(s) of the Type of Holding record that you want to link. The LINKED TYPE OF HOLDING screen appears. (If you do not see the Type of Holding that you want to add, use the *Add item* option to add a new Type of Holding record.)

```
              LINKED TYPE OF HOLDING                        MASTER

LCN      :10008609   Call #: UNC                     ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

     Description                    Type  Supplement/Index type
     -----------                    ----  --------------------
 1.  Paper                          ISS
     Captions/Labels: Vol.:No.:(Date)
 2.  Issues-microfiche              ISS
     Captions/Labels: v.:no.:(Year):(Qtr)
 3.  General Index                  IND
     Captions/Labels: (year)




3 item(s) in list
Options:
 # item   Link   Unlink item(s)   Next expected item   File   Limit list
 Quit holdings   ? Help   Exit
```

6. Select the *Next expected item* option to update predictions.

```
             PUBLICATION PATTERN PREDICTIONS                  MASTER

 LCN      :10008609   Call #: UNC                      ISSN: 0009-5982
 Title    :The Chronicle of higher education
 Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055


 1. Start Enumeration/Chronology:
    v.    : 23        (Qtr)  : 4th qtr
    no.   : 4
    (Year) : 1997
 2. Start Date  : 02/01/98    4. Receipt Delay:
 3. Prediction #: 1          5. Claim Delay  : 4

 Expected  Enumeration                          Chronology
 Date      v.:no.                               (Year):(Qtr)
 02-01-98  23 :4                                1997:4th qtr
 05-01-98  24:1                                 1998:1st qtr
 08-01-98  24:2                                 1998:2nd qtr
 11-01-98  24:3                                 1998:3rd qtr
 Options:
  # line   Line by line   Accept   Forward   Quit holdings   ? Help   Exit
```

7. Edit the numbered fields if necessary. *Accept*. The LINKED TYPE OF
   HOLDING screen appears.

```
             LINKED TYPE OF HOLDING                         MASTER

 LCN      :10008609   Call #: UNC                      ISSN: 0009-5982
 Title    :The Chronicle of higher education
 Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

     Description                     Type  Supplement/Index type
     -----------                     ----  --------------------
  1.  Paper                          ISS
     Captions/Labels: Vol.:No.:(Date)
  2.  Issues-microfiche              ISS
     Captions/Labels: v.:no.:(Year):(Qtr)
  3.  General Index                  IND
     Captions/Labels: (year)

 3 item(s) in list
 Options:
  # item   Link   Unlink item(s)   Next expected item   File   Limit list
   Quit holdings   ? Help   Exit
```

8. *File*. The SERIAL COPY SET DETAIL screen appears.

```
              SERIAL COPY SET DETAIL                       MASTER

LCN      :10008609   Call #: UNC                    ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055


 1. Location    : AL CENTRAL GENERAL
 2. Status      : ACTIVE - Y
 3. Current PO# :
 4. Actual Cost :
 5. Vendor Code : FAXON
 6. Ship To     : UNIT6
 7. Clm Code    :
 8. Routing ID  :
 9. Notes       :


Options:
 # line   Line by line   Routing list   Binding list   Type of holdings
 File   Quit holdings   ? Help   Exit
```

9. *File*. The SERIAL COPY SET SUMMARY screen appears.

```
              SERIAL COPY SET SUMMARY                      MASTER

LCN      :10008609   Call #: UNC                    ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

     Physical Location    Collection/Call number/Copy    Vendor    Status
     ----------------     --------------------------     ------    ------
 1.  ADVLIB Central       GENERAL                        FAXON     Claimed
 2.  ADVLIB Central       GENERAL c.2                    FAXON     Claimed
     Notes: Purchase copy
 3.  ADVLIB Central       GENERAL c.3                    JW&S      Claimed
     Notes: Copyright deposit 2nd copy
 4.  ADVLIB Central       GENERAL                        FAXON     Active




4 item(s) in list
Options:
 # item   Add item   Go to   MARC   Limit list   Quit holdings   ? Help
 Exit
```

10. If you select the *Goto* option and then the *Checkin-in serials* option, the system displays the SERIAL COPY SET SUMMARY screen. After the *Check in* option is used the system asks you to select a SHIPTO location and then a Type of Holding. The TYPE OF HOLDING SUMMARY screen displays all the linked Type of Holdings records, including those just linked. Select the category of material that you are checking in. You can now check in the same title but in different formats.

NOTE: You may have chosen to create a new copy set for the microfiche holdings and then linked it to the microfiche Type of Holdings.

Same Publication — Multiple Receiving Locations with Differing Receipt Dates

When the same title is expected at different locations at different times, you can use the *Next expected* option to change the receipt dates to provide for a title arriving on different dates at different SHIPTO locations. NOTE: To use the *Next expected* option the copy set's status must be *Active*.

1. Obtain the SERIAL COPY SET SUMMARY screen.

```
           SERIAL COPY SET SUMMARY                      MASTER

LCN     :10008609   Call #: UNC                 ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+   LCCN: sf 80001055

     Physical Location    Collection/Call number/Copy    Vendor    Status
     ----------------     --------------------------     ------    ------
 1.  ADVLIB Central       GENERAL                        FAXON     Claimed
 2.  ADVLIB Central       GENERAL c.2                    FAXON     Claimed
     Notes: Purchase copy
 3.  ADVLIB Central       GENERAL c.3                    JW&S      Claimed
     Notes: Copyright deposit 2nd copy
 4.  MAIN BRA1            GEN1                           FAXON     Active




4 item(s) in list
Options:
 # item   Add item   Go to   MARC   Limit list   Quit holdings   ? Help
 Exit
```

2. Select the location that receives the issues late. The SERIAL COPY SET DETAIL screen appears.

```
             SERIAL COPY SET DETAIL                      MASTER

LCN     :10008609   Call #: UNC                   ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055


 1. Location    : MAIN BRANCH 1 GEN1
 2. Status      : ACTIVE - Y
 3. Current PO# :
 4. Actual Cost :
 5. Vendor Code : FAXON
 6. Ship To     : UNIT10
 7. Clm Code    :
 8. Routing ID  :
 9. Notes       :


Options:
 # line   Line by line   Routing list   Binding list   Type of holdings
 File   Quit holdings   ? Help   Exit
```

3. Select the *Type of holdings* option. The LINKED TYPE OF HOLDING screen appears.

```
              LINKED TYPE OF HOLDING                        MASTER

LCN     :10008609  Call #: UNC                      ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

     Description                    Type  Supplement/Index type
     -----------                    ----  --------------------
 1.  Paper                          ISS
     Captions/Labels: Vol.:No.:(Date)
 2.  Issues-microfiche              ISS
     Captions/Labels: v.:no.:(Year):(Qtr)
 3.  General Index                  IND
     Captions/Labels: (year)
 4.  CD-ROM                         ISS
     Captions/Labels: Vol.:No.:(Month):(Day):(Year)



4 item(s) in list
Options:
 # item   Link   Unlink item(s)   Next expected item   File   Limit list
 Quit holdings   ? Help   Exit
```

4. Select the *Next expected* option and enter the line number of the type
   of holding you are changing the receipt date for. The PUBLICATION
   PATTERN PREDICTIONS screen appears.

```
              PUBLICATION PATTERN PREDICTIONS              MASTER

LCN      :10008609   Call #: UNC                  ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055


1. Start Enumeration/Chronology:
   v.    : 23       (Qtr)  : 4th qtr
   no.   : 4
   (Year) : 1997
2. Start Date  : 02/01/98    4. Receipt Delay:
3. Prediction #: 1           5. Claim Delay  : 4

Expected  Enumeration                        Chronology
Date      v.:no.                             (Year):(Qtr)
02-01-98  23 :4                              1997:4th qtr
05-01-98  24:1                              1998:1st qtr
08-01-98  24:2                              1998:2nd qtr
11-01-98  24:3                              1998:3rd qtr
Options:
 # line   Line by line   Accept   Forward   Quit holdings   ? Help   Exit
```

5.   Edit the *Start Date* and *Receipt Delay* fields to reflect the delay in the receiving date of the issue. (In the *Receipt Delay* field enter the approximate number of days after the predicted publication date that receipt of the issue is expected. Use a minus sign if issues are expected before the publication date.)

```
              PUBLICATION PATTERN PREDICTIONS                MASTER

LCN     :10008609   Call #: UNC                    ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055


1. Start Enumeration/Chronology:
   v.    : 23       (Qtr) : 4th qtr
   no.   : 4
   (Year) : 1997
2. Start Date  : 02/03/98    4. Receipt Delay: 2
3. Prediction #: 1          5. Claim Delay  : 4

Expected  Enumeration                      Chronology
Date      v.:no.                           (Year):(Qtr)
02-03-98  23 :4                            1997:4th qtr
05-03-98  24:1                             1998:1st qtr
08-03-98  24:2                             1998:2nd qtr
11-03-98  24:3                             1998:3rd qtr
Options:
 # line   Line by line   Accept   Forward   Quit holdings   ? Help   Exit
```

6. *Accept*. The LINKED TYPE OF HOLDING screen appears.

```
              LINKED TYPE OF HOLDING                        MASTER

LCN     :10008609   Call #: UNC                    ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

    Description                    Type  Supplement/Index type
    -----------                    ----  --------------------
 1.  Paper                         ISS
    Captions/Labels: Vol.:No.:(Date)
 2.  Issues-microfiche             ISS
    Captions/Labels: v.:no.:(Year):(Qtr)
 3.  General Index                 IND
    Captions/Labels: (year)
 4.  CD-ROM                        ISS
    Captions/Labels: Vol.:No.:(Month):(Day):(Year)



4 item(s) in list
Options:
 # item   Link   Unlink item(s)   Next expected item   File   Limit list
 Quit holdings   ? Help   Exit
```

7. *File*. The SERIAL COPY SET DETAIL screen appears. The system now predicts the arrival date of the issue at AL Central (SHIPTO Unit6) two days ahead of the arrival of the issue at Main Branch 1 (SHIPTO Unit11).

Creating & Editing Publication Pattern Records

You can create publication pattern records based on existing records and merely edit them or create entirely new records. Whenever you edit an existing record, the system allows you to replace the old record with the new one or keep both records.

Predictions

When you create a publication pattern record, you can choose to allow the system to generate predictions automatically. Alternately, you can specify the predictions.

Creating a New Publication Pattern

1. From Holdings edit, select the *Pub. pattern display* option. The PUBLICATION PATTERN SUMMARY screen appears.

```
              PUBLICATION PATTERN SUMMARY                    USER1

 LCN      :10008609   Call #: UNC                      ISSN: 0009-5982
 Title    :The Chronicle of higher education
 Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055


      Enumeration/Chronology   Frequency      Description
      ---------------------    ---------      -----------
  1.  Vol.:No.:(Month):(Day):  Weekly         Paper
      (Year)
      Notes: published weekly except for last week in August and last two
      weeks in December
  2.  y.                       Annual         Supplements
  3.  v.:n.:pt.:pt.:(y.):(mo.) Annual         Indexes
  4.  v.:i.                                    Bound PIECES
  5.  LL:LLF                   Quarterly      Looseleaf


 5 item(s) in list
  Options:
   # item   Add item   Delete item(s)   Go to   Limit list   Quit holdings
   ? Help   Exit
```

2. Select the *Add item* option. If more than one Type of Holding record is associated with the title, the TYPE OF HOLDING SUMMARY screen appears. If a single Type of Holding record is associated with the title the PUBLICATION PATTERN DETAIL screen appears.

```
               TYPE OF HOLDING SUMMARY                          USER1

LCN      :10008609   Call #: UNC                      ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

       Description                    Type   Supplement/Index type
       -----------                    ----   --------------------
 1.  Paper                            ISS
     Captions/Labels: Vol.:No.:(Month):(Day):(Year)
 2.  Supplements    SUP               ANNUAL
     Captions/Labels:y.
 3.  Indexes        IND               ANNUAL
     Captions/Labels:v.:n.:pt.:pt.:(y.):(mo.)
 4.  Bound PIECES   ISS
     Captions/Labels:y.:i.
 5.  Looseleaf      ISS
     Captions/Labels:LL:LLF


8 item(s) in list
Options:
 Retrieve #   Add item   Forward   Limit list   Quit holdings   ? help
 Exit
```

3. Use the *Retrieve #* option to select a type of holding record. The
    PUBLICATION PATTERN DETAIL screen appears.

```
                   PUBLICATION PATTERN DETAIL                    USER1
                                             (1 of 5 Publication Patterns)
LCN      :10008609  Call #: UNC                       ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055
Publication Type:ISS - Paper                                  ** ACTIVE **
1. Enumeration       Level 1     Level 2    Level 3   Level 4  Level 5 Level 6
   Caption/Label  : Vol.         No.
   Number of Parts :            49
   Numbering Code  :            R
2. Chronology        Level 1     Level 2    Level 3   Level 4
   Caption/Label  : (Month)      (Day)      (Year)
   Code           : M            DD          Y
3. Copy Caption    : c.
4. Ind/Supp Caption:                              Associated Level:
5. Frequency Code  : w -Weekly                 6. Auto Prediction : Y
7. Regularity Pattern: U - Monthly (by user)
   Dates Published: 0102,0109,0116,0123,0130,0206,0213,0220,0227,0306,0313,
   Base Level    : 2
   Calendar Change: 09
8. Date Range     :
Options:
 # line   Line by line   Second screen   Predictions   MARC   Delete   File
 Quit holdings   ? Help   Exit
```

4. Complete the record and use the *Second* screen option to see the second page of the record.

5. Select the *Predictions* option. The PUBLICATION PATTERN PREDIC-TIONS screen appears. If you entered Y in the *Auto Prediction* field, the system displays the predictions based on the information you provided.

```
               PUBLICATION PATTERN PREDICTIONS              USER1
                                                  (New Publication Pattern)
LCN      :10008609  Call #: UNC                        ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055
Publication Type:ISS - Paper                                ** ACTIVE **

1. Start Enumeration/Chronology:
   v.    : 44        (Mon.) : JAN
   no.   : 17
   (Year) : 1998
2. Start Date  : 01/09/98    4. Receipt Delay: 0
3. Prediction #: 2           5. Claim Delay  : 4

Expected  Enumeration                        Chronology
Date      v.:no.                             (Year):(Mon.)
01-09-98  44:17                              1998:JAN
02-01-98  45:1                               1998:FEB
03-01-98  45:2                               1998:MAR
04-01-98  45:3                               1998:APR
Options:
 # line   Line by line   Accept   Forward   Quit holdings   ? Help   Exit
```

6. Select *Accept*. The PUBLICATION PATTERN DETAIL screen appears.

    NOTE: Use this screen to specify Receipt and Claim delays.

7. Select *File*.

Editing an Existing Publication Pattern

In this example, a publication pattern is changed to reflect a change in publication frequency, enumeration, and chronology from bimonthly to quarterly with a split year.

1. From Holdings edit, select the *Pub. pattern display* option. The PUBLICATION PATTERN SUMMARY screen appears.

```
               PUBLICATION PATTERN SUMMARY                   MASTER

LCN    :10008609   Call #: UNC                    ISSN: 0009-5982
Title  :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

     Enumeration/Chronology   Frequency      Description
     ----------------------   ---------      -----------
 1.  Vol.:No.:(Year):(Month)  Bimonthly      Paper
 2.  Vol.:No.:(Date)          Monthly        Paper
     Notes: Extra issue in October.
 3.  Vol.:No.:(Month):(Day):  Biweekly       Paper
     (Year)                   (every 2
                              weeks)
     Notes: Extra issue in October.
 4.  Vol.:No.:(Month):(Day):  Weekly         Paper
     (Year)
     Notes: published weekly except for last week in August and last two
     weeks in December
14 item(s) in list
Options:
 # item   Add item   Delete item(s)   Go to   Forward   Limit list
 Quit holdings   ? Help   Exit
```

2. Select the *# item* option and enter a number.

```
              PUBLICATION PATTERN DETAIL                    MASTER
                                          (1 of 6 Publication Patterns)
LCN      :10008609  Call #: UNC                         ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055
Publication Type:ISS - Paper                                 ** ACTIVE **
1. Enumeration       Level 1     Level 2     Level 3   Level 4  Level 5 Level 6
   Caption/Label  : v.          pt
   Number of Parts :            4
   Numbering Code  :            R
2. Chronology        Level 1     Level 2     Level 3   Level 4
   Caption/Label  : (Year)      (QTR)
   Code           : SPLYR       Q-APR
3. Copy Caption   :
4. Ind/Supp Caption:                               Associated Level:
5. Frequency Code : q -Quarterly              6. Auto Prediction : Y
7. Regularity Pattern: M - Monthly
   JA  FE  MR  AP  MA  JN  JL  AU  SE  OC  NO  DE
   0   1   0   0   1   0   0   1   0   0   1   0
   First Issue: 1 Days btn Issues: 0  Base Level: 2  Calendar Change:
8. Date Range     :
Options:
 # line   Line by line   Second screen   Predictions   MARC   Delete   File
 Quit holdings   ? Help   Exit
```

3. Edit the fields to reflect the changes in publication frequency, enumeration, and chronology. Select the *Predictions* option. The PUBLICATION PATTERN PREDICTIONS screen appears.

```
              PUBLICATION PATTERN PREDICTIONS                 MASTER
                                              (1 of 6 Publication Patterns)
LCN      :10008609   Call #: UNC                    ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055
Publication Type:ISS - Paper                              ** ACTIVE **

1. Start Enumeration/Chronology:
   v.     : 1        (QTR) : 4th qtr
   pt     : 4
   (Year) : 97/98
2. Start Date  : 02/01/98    4. Receipt Delay: 0
3. Prediction #: 1           5. Claim Delay  : 0

Expected   Enumeration                        Chronology
Date       v.  :pt                            (Year):(QTR)
02-01-98   1:4                                97/98:4th qtr
05-01-98   2:1                                97/98:1st qtr
08-01-98   2:2                                97/98:2nd qtr
11-01-98   2:3                                97/98:3rd qtr
Options:
 # line   Line by line   Accept   Forward   Quit holdings   ? Help   Exit
```

4. Edit the numbered fields to reflect the changes in the enumeration and chronology.

5. *Accept.* The PUBLICATION PATTERN DETAIL screen appears.

```
                 PUBLICATION PATTERN DETAIL                      MASTER
                                              (1 of 6 Publication Patterns)
LCN      :10008609  Call #: UNC                          ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055
Publication Type:ISS - Paper                                   ** ACTIVE **
1. Enumeration      Level 1     Level 2    Level 3   Level 4  Level 5 Level 6
   Caption/Label  : v.          pt
   Number of Parts :            4
   Numbering Code  :            R
2. Chronology       Level 1     Level 2    Level 3   Level 4
   Caption/Label  : (Year)      (QTR)
   Code           : SPLYR       Q-APR
3. Copy Caption    :
4. Ind/Supp Caption:                              Associated Level:
5. Frequency Code  : q -Quarterly               6. Auto Prediction : Y
7. Regularity Pattern: M - Monthly
   JA  FE  MR  AP  MA  JN  JL  AU  SE  OC  NO  DE
   0   1   0   0   1   0   0   1   0   0   1   0
   First Issue: 1 Days btn Issues: 0  Base Level: 2  Calendar Change:
8. Date Range      :
Options:
 # line   Line by line   Second screen   Predictions   MARC   Delete   File
 Quit holdings   ? Help   Exit
```

6. *File.* The system displays the message: Do you want to
    retain the old record? (Y/N). If you answer Y the
    system adds the new record to the PUBLICATION PATTERN
    SUMMARY screen. The enumeration and chronology patterns are
    retained for the old pattern. Both the old pattern and the new pattern
    display on the Checkin screen. If you say N, the enumeration and
    chronology for the old pattern will be changed to the new pattern.
    The system displays the message: Do you want next
    expected information updated? Answer Y to change the
    enumeration and chronology of the next expected part. The PUBLI-
    CATION PATTERN SUMMARY screen appears.

Creating Copy Sets Manually

If you order serials from Acquisitions, the system automatically creates copy sets when the order is transferred to the catalogue. If the copy set was created by the Acquisitions to Catalogue Transfer, default information is provided for most of the fields on this screen.

However, copy sets can also be created manually from the SERIAL COPY SET DETAIL screen.

Procedure

1. From Holdings edit select the *Serial copy display* option. The SERIAL COPY SET SUMMARY screen appears.

```
              SERIAL COPY SET SUMMARY                      USER1

 LCN     :10008609   Call #: UNC                 ISSN: 0009-5982
 Title   :The Chronicle of higher education
 Imprint :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055

     Physical Location    Collection/Call number/Copy    Vendor    Status
     -----------------    --------------------------     ------    ------
 1.  ADVLIB Central       GENERAL c.1                     FAXON     Claimed
     Notes: Purchase copy
 2.  ADVLIB Central       GENERAL c.2                     FAXON     Claimed
     Notes: Purchase copy
 3.  ADVLIB Central       GENERAL c.3                     JW&S      Claimed
     Notes: Copyright deposit 2nd copy
 4.  ADVLIB Central       GENERAL c.4                     JW&S      Claimed
     Notes: Copyright Deposit 1st copy




 4 item(s) in list
 Options:
  # item   Add item   Go to   MARC   Limit list   Quit holdings   ? Help
  Exit
```

2. Select the *Add item* option. The SERIAL COPY SET DETAIL screen appears.

```
                 SERIAL COPY SET DETAIL                        MASTER

LCN      :10008609   Call #: UNC                      ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055


 1. Location    : AL CENTRAL GENERAL
 2. Status      : ACTIVE - N
 3. Current PO# :
 4. Actual Cost :
 5. Vendor Code : FAXON
 6. Ship To     : SHP1
 7. Clm Code    : 21day
 8. Routing ID  : P91000191
 9. Notes       : Replaces damaged copy




Options:
 # line   Line by line   Copy   File   Quit holdings   ? Help   Exit
```

3. Complete the information. *File*. See *Serial Copy Set Detail* on page 7-109.

4. The system displays the message:

    ```
    WARNING - No Type of Holding records linked to this copy
    set. The copy set cannot be checked in without Type of
    Holding records.
    ```

    If this is an active copy set, the system displays the LINKED TYPE OF HOLDING screen. See *Linking Type of Holding Records to a Copy Set* on page 4-45.

5. When you *File* the Type of Holding record or if this record defines an inactive copy set, the system prompts:

    ```
    Record is filed - Any further updates ? (Y/N) N
    ```

    Y – The SERIAL COPY SET DETAIL screen appears.

    N – The SERIAL COPY SET SUMMARY screen appears.

NOTE: Copy sets created in this manner are not linked to Acquisitions orders for the title. Orders can be linked to manually created copy sets in Acquisitions.

Linking Type of Holding Records to a Copy Set

Access   Select the *Type of Holding* option from the SERIAL COPY SET DETAIL screen.

This option links the Type of Holding with specific copy sets. Copy set records must be linked to a type of holding record if you want to checkin the copies.

```
             SERIAL COPY SET DETAIL                        MASTER

LCN     :10008609   Call #: UNC                  ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055


 1. Location    : AL CENTRAL GENERAL c.4
 2. Status      : ACTIVE - Y  Outstanding Claims
 3. Current PO# :
 4. Actual Cost :
 5. Vendor Code : JW&S
 6. Ship To     : UNIT5
 7. Clm Code    : noclm
 8. Routing ID  : P91000168
 9. Notes       : Copyright Deposit 1st copy


Options:
 # line   Line by line   Routing list   Binding list   Type of holdings
 File   Quit holdings   ? Help   Exit
```

1. From the SERIAL COPY SET DETAIL select the *Type of Holdings* option. The LINKED TYPE OF HOLDING screen appears.

```
              LINKED TYPE OF HOLDING                        MASTER

LCN      :10008609   Call #: UNC                      ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

     Description                        Type  Supplement/Index type
     -----------                        ----  --------------------
 1.  Paper                              ISS
     Captions/Labels: Vol.:No.:(Month):(Day):(Year)



1 item(s) in list
Options:
 # item   Link   Unlink item(s)   Next expected item   File   Limit list
 Quit holdings   ? Help   Exit
```

2. The system displays the Type of Holding records that are already
    linked to the copy set. If no Type of Holding records appear, it means
    that the copy set has not been linked to a Type of Holding record.
    Select the *Link* option. The LINK TYPE OF HOLDING TO COPY SET
    screen appears. All the Type of Holding records that have been
    defined for the title are displayed. If a record is already linked to the
    copy set, a Y appears under the *Link* column.

```
              LINK TYPE OF HOLDING TO COPY SET             MASTER

LCN      :10008609   Call #: UNC                      ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

     Description                        Type  Supplement/Index type      Linked
     -----------                        ----  --------------------       ------
 1.  Paper                              ISS                                Y
     Captions/Labels: Vol.:No.:(Month):(Day):(Year)
 2.  Loose-Leaf                         ISS                                N
     Captions/Labels: No.:(year):(month)
 3.  CD-ROM                             ISS                                N
     Captions/Labels: Disk.



3 item(s) in list
Options:
 Retrieve item(s)   # item   Add item   Mark item(s)   Limit list
 Quit holdings   ? Help   Exit
```

3. Select the *Retrieve item(s)* option and enter the number of the type of holding record that you are linking to the copy set.

NOTE: Mark allows you to select an item but you must still retrieve it to complete the linking.

Mark item(s)   Select the numbers of the items you want to link, e.g. 1, 3, 13-15. This option allows you to page through multiple screens to mark items for linking to one copy set. When you use this option, the option line changes. Use the *Retrieve* option to return to the LINKED TYPE OF HOLDING screen. This links the type of holdings record to the copy set.

Unmark   Any marked items are de-selected. This does not affect any types of holdings records that are already linked.

NOTE: If the list of type of holdings records does not include one that you need, use the *Add item* option to create another type of holding record.

```
              LINKED TYPE OF HOLDING                      MASTER

 LCN     :10008609  Call #: UNC                   ISSN: 0009-5982
 Title   :The Chronicle of higher education
 Imprint :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055

     Description                    Type  Supplement/Index type
     -----------                    ----  --------------------
 1.  Paper                          ISS
     Captions/Labels: Vol.:No.:(Month):(Day):(Year)
 2.  Loose-Leaf                     ISS
     Captions/Labels: No.:(year):(month)



 2 item(s) in list
 Options:
  # item   Link   Unlink item(s)   Next expected item   File   Limit list
  Quit holdings   ? Help   Exit
```

4. The system links the records and displays the LINKED TYPE OF HOLDING screen. You may want to update the next expected information at this time. (See *Updating Next Expected Information* on page 4-49.) Select *File*. The SERIAL COPY SET DETAIL screen appears.

NOTE: When more than one Type of Holding record is linked to a copy set the system displays the TYPE OF HOLDING SUMMARY screen when you Checkin copies. In this example, you would have the choice of checking in either the paper issues or the loose-leaf issues. This feature accommodates the need to have multiple publication patterns for multiple physical formats.

Updating Next Expected Information

To update next expected information, access the LINKED TYPE OF HOLDING screen from the *Type of holdings* option on the SERIAL COPY SET DETAIL screen.

```
            SERIAL COPY SET DETAIL                      MASTER

 LCN     :10008609   Call #: UNC                 ISSN: 0009-5982
 Title   :The Chronicle of higher education
 Imprint :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055


 1. Location    : AL CENTRAL GENERAL c.4
 2. Status      : ACTIVE - Y  Outstanding Claims
 3. Current PO# :
 4. Actual Cost :
 5. Vendor Code : JW&S
 6. Ship To     : UNIT5
 7. Clm Code    : noclm
 8. Routing ID  : P91000168
 9. Notes       : Copyright Deposit 1st copy




 Options:
  # line   Line by line   Routing list   Binding list   Type of holdings
  File   Quit holdings   ? Help   Exit
```

1. From the SERIAL COPY SET DETAIL screen, select the *Type of holdings* option. The LINKED TYPE OF HOLDING screen appears.

```
              LINKED TYPE OF HOLDING                       MASTER

LCN      :10008609   Call #: UNC                    ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055

     Description                      Type  Supplement/Index type
     -----------                      ----  --------------------
 1.  Paper                           ISS
     Captions/Labels: Vol.:No.:(Month):(Day):(Year)
 2.  Loose-Leaf                      ISS
     Captions/Labels: No.:(year):(month)




2 item(s) in list
Options:
 # item   Link   Unlink item(s)   Next expected item   File   Limit list
 Quit holdings   ? Help   Exit
```

2. Select the *Next expected item* option and enter the line number of the type of holding that you want to update. The PUBLICATION PATTERN PREDICTIONS screen appears.

```
            PUBLICATION PATTERN PREDICTIONS             MASTER

LCN      :10008609   Call #: UNC                    ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055


1. Start Enumeration/Chronology:
   Vol.  : 44        (Day) : 15
   No.   : 20        (Year) : 1998
   (Month): FEB
2. Start Date  : 01/09/98    4. Receipt Delay: 0
3. Prediction #: 2           5. Claim Delay  : 4

Expected  Enumeration                    Chronology
Date      Vol.:No.                       (Month):(Day):(Year)
01-09-98  44:20                          FEB:15:1998
01-16-98  44:21                          JAN:16:1998
01-23-98  44:22                          JAN:23:1998
01-30-98  44:23                          JAN:30:1998
Options:
 # line   Line by line   Accept   Forward   Quit holdings   ? Help   Exit
```

3. Edit the *Start Date* field to change the predicted date for the first issue expected (defined in the Start Enumeration/Chronology).

Edit the *Prediction #* field only if this is a month, season, or user-defined pattern and there is more than one part received in the month. In this case, the Prediction number should correspond to the number of the part received. For example, if the part described in field 1 is the second part received in the month, enter 2; if the part described in field 1 is the third part received in the month, enter 3.

Edit the receipt and claim delays for the expected issue, if necessary. (Use the *Forward* option to see future predictions and to verify that the receipt delay is correct.)

You cannot edit the expected dates for issues other than the issue displayed in the first field. If you do edit any other issue, the system assumes it is the next expected issue and it appears as the first issue displayed in the list of predictions. To change future expected dates, use the *Retrieve #* option from the CHECKIN screen. (In this example, FEB was changed to JAN for Vol. 44, No. 20.)

When you are finished updating the numbered fields, the system repaints the bottom of the screen starting with the first issue expected (defined in the numbered fields) and predicts the next three issues.

NOTE: The *Start Enumeration/Chronology* field is common to all SHIPTO locations for this title. You should not have to update this field. The *Start Date* field is specific to this SHIPTO. Fields 2-5 are specific to each SHIPTO location.

```
              PUBLICATION PATTERN PREDICTIONS              MASTER

 LCN     :10008609  Call #: UNC                    ISSN: 0009-5982
 Title   :The Chronicle of higher education
 Imprint :[Washington, etc., Chronicle of higher e+    LCCN: sf 80001055


 1. Start Enumeration/Chronology:
    Vol.   : 44      (Day) : 15
    No.    : 20      (Year) : 1998
    (Month): JAN
 2. Start Date  : 01/09/98    4. Receipt Delay: 0
 3. Prediction #: 2          5. Claim Delay  : 4

 Expected   Enumeration                     Chronology
 Date       Vol.:No.                        (Month):(Day):(Year)
 01-09-98   44:20                           JAN:15:1998
 01-16-98   44:21                           JAN:16:1998
 01-23-98   44:22                           JAN:23:1998
 01-30-98   44:23                           JAN:30:1998
 Options:
  # line   Line by line   Accept   Forward   Quit holdings   ? Help   Exit
```

4. Select *Accept*. The LINKED TYPE OF HOLDING screen appears.

Deleting Copy Sets

A copy set is deleted by deleting the Location Copy Record to which it is linked.

Deleting a copy set cannot be undone. Usually, a copy set is deleted only if it has been added accidently. The system allows you to delete active copy set records but warns you before you do so.

Before you delete a copy set record, you should move or delete all the parts associated with a copy set.

To inactivate a copy set change its status on the SERIAL COPY SET DETAIL screen.

Deletion is Final

When you delete a copy set the action is complete. In prior releases, the deletion was not complete until you ran the Copy Set Deletion processing job. It is no longer necessary to run a processing job to complete the action.

When you delete the copy set by deleting the Location Copy record it is linked to, from the Location Copy Summary screen, the system:

• deletes completely the copy set

• deletes all copy set holdings information

• deletes all piece holdings (if any) from the copy set

• deletes the copy set private routing list (if any)

• detaches the standard routing list (if any) from the copy set

• turns the copy set claims (if any) into historic claims.

Procedure

1. From *Holdings edit*, select the *Locations display* option. The LOCA-TION COPY SUMMARY screen appears.

```
              LOCATION COPY SUMMARY                           MASTER

 LCN     :10008609   Call #: UNC                     ISSN: 0009-5982
 Title   :The Chronicle of higher education
 Imprint :[Washington, etc., Chronicle of higher e+   LCCN: sf 80001055

      Physical Location    Collection/Call number/Copy    Format
      -----------------    --------------------------     ------
 1.   ADVLIB Central       GENERAL c.1                    Regular print
 2.   ADVLIB Central       GENERAL c.2                    Regular print
 3.   ADVLIB Central       GENERAL c.3                    Regular print
 4.   ADVLIB Central       GENERAL c.4                    Regular print
 5.   ADVLIB Landover      GENERAL                        not defined


 5 item(s) in list.
 Options:
  # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
  Quit holdings   ? Help   Exit
```

2. Select the *Delete item(s)* option and enter the line number of the item you want to delete. The system displays an error message.

```
                  LOCCPY Deletion Error/Warning Report

      Number of records: 1
      Error(s) encountered for attached copy set record(s)
      ----------------------------------------------------------------
      Location copy at line 5 is attached to Copy set record(s).






 Options:
  ? Help   Exit
```

3. Select *Exit*. The system prompts for confirmation that you want to delete the copy set.

```
                    LOCCPY Deletion Error/Warning Report

        Number of records: 1
        Error(s) encountered for attached copy set record(s)
        ----------------------------------------------------------------
        Location copy at line 5 is attached to Copy set record(s).




  Okay to delete active copy sets (Y/N)? y
```

4. When you answer Yes the system displays another warning telling you that pieces/parts are attached.

```
                    LOCCPY Deletion Error/Warning Report

        Number of records: 2
        Errors/Warnings encountered for attached PIECES record(s)
        ----------------------------------------------------------------
        Warning: Location copy at line 5 has pieces/parts attached.
        Warning - deleting *LAST* piece from : AL Landover



  Options:
   ? Help   Exit
```

5. Select *Exit*.

```
                    LOCCPY Deletion Error/Warning Report

     Number of records: 2
     Errors/Warnings encountered for attached PIECES record(s)
     ----------------------------------------------------------------
     Warning: Location copy at line 5 has pieces/parts attached.
     Warning - deleting *LAST* piece from : AL Landover




 1 of 1 can be deleted. Delete it (Y/N)? y
```

6. The system prompts you for a final confirmation on the deletion. If you answer Yes the Copy Set Record and its associated pieces are deleted. If the parts are linked to another location, the parts will not be deleted.

Creating Routing Lists

A routing list is identified by its Routing ID Code. There are two types of routing lists:

- library-defined, indexed codes for standard, centrally-maintained lists. These are created from the SERIALS CONTROL ROUTING MENU (RTEM).

- system-assigned, non-indexed codes for private (copy set specific) lists — these are numeric codes that begin with a "P". To define a routing list for a specific copy set use the *Routing list* option from the SERIAL COPY SET DETAIL screen.

If a Routing List is defined for a copy set, every time a copy is received (checked in) a Routing Slip is printed.

```
              SERIAL COPY SET DETAIL                        MASTER

LCN      :10008609   Call #: UNC                   ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055


 1. Location     : AL CENTRAL GENERAL c.4
 2. Status       : ACTIVE - Y  Outstanding Claims
 3. Current PO#  :
 4. Actual Cost  :
 5. Vendor Code  : JW&S
 6. Ship To      : UNIT5
 7. Clm Code     : noclm
 8. Routing ID   :
 9. Notes        : Copyright Deposit 1st copy




Options:
 # line   Line by line   Routing list   Binding list   Type of holdings
 File   Quit holdings   ? Help   Exit
```

1. From the SERIAL COPY SET DETAIL screen select the *Routing list* option. The ROUTING LIST screen appears.

```
              ROUTING LIST                                  MASTER

LCN      :10008609   Call #: UNC                    ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055

    PATRON BARCODE/ROUTING ID NAME                  LOCATION
 1  -000785                Unit 7                   UNIT7/LW, LM607
 2  -000784                Unit 6                   Unit6/DO,LM606
 3  -000774                Unit 2                   ACQ/Unit 2
 4
 5
 6
 7
 8
 9
10
11
12

Options:
 Insert at line #   Delete line #   Move    File    Forward   Backward
 # line   Line by line   ? Help   Exit
```

2. Use the *Insert at line #* option to add a new recipient to the list. The system prompts you to enter the routing identification number or the patron barcode. (Routing identification numbers are defined from the Add/Update Standard Routing IDs (RADD) table on the SERIALS CONTROL ROUTING MENU [RTEM]).

```
              ROUTING LIST                              MASTER

LCN      :10008609   Call #: UNC                   ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+    LCCN: sf 80001055

    PATRON BARCODE/ROUTING ID NAME                     LOCATION
 1  -000785                 Unit 7               UNIT7/LW, LM607
 2  -000784                 Unit 6               Unit6/DO,LM606
 3  -000774                 Unit 2               LC Unit 2
 4
 5
 6
 7
 8
 9
10
11
12

Enter a valid standard routing id or a patron barcode
```

3. Enter a routing ID or patron barcode. To see the list of available patrons, enter ??. To browse the existing list of routing IDs, enter S?. Patrons appear on this list when the following settings have been made on the PATRON REGISTRATION (CPR) screen in Circulation:

- the *Rte. Recipient* field is set to Y

- a routing location is specified in the *Rte. Location* field.

```
              ROUTING LIST                                 MASTER

 LCN     :10008609   Call #: UNC                      ISSN: 0009-5982
 Title   :The Chronicle of higher education
 Imprint :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

    PATRON BARCODE/ROUTING ID NAME                    LOCATION
  1  -000785                 Unit 7                    UNIT7/LW, LM607
  2  -000784                 Unit 6                    Unit6/DO,LM606
  3  -000774                 Unit 2                    LC Unit 2
  4  60011                   Unit 1                    U1,LM607,MS1400
  5
  6
  7
  8
  9
 10
 11
 12

 Private routing list changes have been filed
```

4. The system displays a messages confirming that a private routing list
    has been created. The system assigned "P" number appears on the
    SERIAL COPY SET DETAIL screen.

```
              SERIAL COPY SET DETAIL                       MASTER

 LCN     :10008609   Call #: UNC                      ISSN: 0009-5982
 Title   :The Chronicle of higher education
 Imprint :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055


  1. Location    : AL CENTRAL GENERAL c.4
  2. Status      : ACTIVE - Y   Outstanding Claims
  3. Current PO# :
  4. Actual Cost :
  5. Vendor Code : JW&S
  6. Ship To     : UNIT5
  7. Clm Code    : noclm
  8. Routing ID  : P91000168
  9. Notes       : Copyright Deposit 1st copy


 Options:
  # line   Line by line   Routing list   Binding list   Type of holdings
  File   Quit holdings   ? Help   Exit
```

Creating Bound Volumes

Bound volumes can be created by the system from Holdings edit when you access the *Binding List* option from the SERIAL COPY SET DETAIL screen.

You can also create bound volumes manually by using the linking feature from the *Volume/Part#* field on the PIECES DETAIL screen. (See *Updating the Piece (Changing the status, naming the bound volume, etc.)* on page 4-70.)

Regardless of the method used to create bound volumes, you must name the bound volume from the PIECES DETAIL screen. This also gives you an opportunity to assign or edit call numbers.

Creating Bound Volumes from Serials

Procedure

Creating a bound volume is a three part process:

- Select the parts to bind (sending items to bindery)

- Update the binding list to indicate that the parts have been bound

- Marking the items as bound

- Update the new barcoded piece, that is, name the bound volume, add notes, change the status, etc.

Marking Items (Parts) as Sent to the Bindery

1. From the search screen, select the *Holdings edit* option. The Option line changes.

```
                         Online Catalogue - BRIEF DISPLAY       (1 of 1 titles)
Local Control # :10008609
LCCN           :sf 80001055
ISSN           :0009-5982
AUTHOR         :Editorial Projects for Education, Inc.
TITLE          :The Chronicle of higher education
Pub/Size       :Chronicle of higher education, etc.] 43 cm.

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.  ADVLIB Central GENERAL c.1 /Regular print
     Paper: Vol.43:No.49(AUG:22:1997)-Vol.44:No.4(SEP:26:1997),
            Vol.44:No.6(OCT:10:1997),Vol.44:No.8(OCT:24:1997)-
            Vol.44:No.16(JAN:02:1998)
 2.  ADVLIB Central GENERAL c.2 /Regular print
     Paper: Vol.43:No.49(AUG:22:1997),Vol.44:No.2(SEP:12:1997)-
            Vol.44:No.4(SEP:26:1997),Vol.44:No.6(OCT:10:1997),
            Vol.44:No.9(OCT:31:1997)-Vol.44:No.16(JAN:02:1998)
 3.  ADVLIB Central GENERAL c.3 /Regular print
     Paper: Vol.43:No.49(AUG:22:1997),Vol.44:No.2(SEP:12:1997)-
4 item(s) in list.
Options:
 OPAC display   Pieces display   Type of holdings display   Parts display
 Pub. pattern display   Locations display   Serial copy display
 Check-in serials   Bibliographic edit   Order display   Exit
```

2. Select the Serial copy display option. The SERIAL COPY SET SUMMARY screen appears.

```
           SERIAL COPY SET SUMMARY                      MASTER

 LCN      :10008609   Call #: UNC                  ISSN: 0009-5982
 Title    :The Chronicle of higher education
 Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

      Physical Location    Collection/Call number/Copy    Vendor    Status
      -----------------    --------------------------     ------    ------
  1.  ADVLIB Central       GENERAL c.1                    FAXON     Claimed
      Notes: Purchase copy
  2.  ADVLIB Central       GENERAL c.2                    FAXON     Claimed
      Notes: Purchase copy
  3.  ADVLIB Central       GENERAL c.3                    JW&S      Claimed
      Notes: Copyright deposit 2nd copy
  4.  ADVLIB Central       GENERAL c.4                    JW&S      Claimed
      Notes: Copyright Deposit 1st copy


 4 item(s) in list
 Options:
  # item   Add item   Go to   MARC   Limit list   Quit holdings   ? Help
  Exit
```

3. Use the *# item* to select an active copy set. The SERIAL COPY SET
    DETAIL screen appears

```
            SERIAL COPY SET DETAIL                      MASTER

 LCN      :10008609   Call #: UNC                  ISSN: 0009-5982
 Title    :The Chronicle of higher education
 Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055


  1. Location    : AL CENTRAL GENERAL c.1
  2. Status      : ACTIVE - Y  Outstanding Claims
  3. Current PO# :
  4. Actual Cost :
  5. Vendor Code : FAXON
  6. Ship To     : UNIT5
  7. Clm Code    : 21day
  8. Routing ID  : P91000170
  9. Notes       : Purchase copy


 Options:
  # line   Line by line   Routing list   Binding list   Type of holdings
  File   Quit holdings   ? Help   Exit
```

4. Select the *Binding list* option. The BINDING LIST screen appears. All parts for this copy set that have a status of Received or In Bindery are displayed.

```
            BINDING LIST                              MASTER

LCN      :10008609   Call #: UNC                  ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+   LCCN: sf 80001055
CAMPUS   :ADVLIB                   LIBRARY: CENTRAL   COPY #: 1

    Enumeration/Chronology                       Status    In Bindery

  1. Vol.44:No.16(JAN:02:1998)                   Received      N
  2. Vol.44:No.15(DEC:12:1997)                   Received      Y
  3. Vol.44:No.14(DEC:05:1997)                   Received      Y
  4. Vol.44:No.13(NOV:28:1997)                   Received      Y
  5. Vol.44:No.12(NOV:21:1997)                   Received      Y
  6. Vol.44:No.11(NOV:14:1997)                   Received      Y
  7. Vol.44:No.10(NOV:07:1997)                   Received      Y
  8. Vol.44:No.9(OCT:31:1997)                    Received      N
  9. Vol.44:No.8(OCT:24:1997)                    Received      N
 10. Vol.44:No.6(OCT:10:1997)                    Received      N
 11. Vol.44:No.4(SEP:26:1997)                    Received      N


Is item in BINDERY
```

5. Select the *Update* option. The cursor is positioned at the first line in the *In Bindery* column. The system prompts: Is item in BINDERY. Change the N to Y for each part that you want to bind. You must respond to each Y or N prompt. (If you reach a point in the list when you want to exit <Space Bar> <Enter> to return to the option line.) The option line appears when you have completed the list or if you exit the list.

6. Select *File*. The system updates the status of the Received parts (whose flags you set to Y) to *In Bindery* and displays the SERIAL COPY SET DETAIL screen. If you choose the *Binding List* option again, you see the following screen. Note that the statuses have changed.

```
            BINDING LIST                            MASTER

LCN      :10008609  Call #: UNC                 ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+    LCCN: sf 80001055
CAMPUS   :ADVLIB                    LIBRARY: CENTRAL   COPY #: 1


    Enumeration/Chronology                      Status    In Bindery

  1. Vol.44:No.16(JAN:02:1998)                  Received      N
  2. Vol.44:No.15(DEC:12:1997)                  In Bindery    N
  3. Vol.44:No.14(DEC:05:1997)                  In Bindery    N
  4. Vol.44:No.13(NOV:28:1997)                  In Bindery    N
  5. Vol.44:No.12(NOV:21:1997)                  In Bindery    N
  6. Vol.44:No.11(NOV:14:1997)                  In Bindery    N
  7. Vol.44:No.10(NOV:07:1997)                  In Bindery    N
  8. Vol.44:No.9(OCT:31:1997)                   Received      N
  9. Vol.44:No.8(OCT:24:1997)                   Received      N
 10. Vol.44:No.6(OCT:10:1997)                   Received      N
 11. Vol.44:No.4(SEP:26:1997)                   Received      N
Options:
 Forward   Backward   Update   File   Quit holdings  ? Help   Exit
```

Marking the Items as Bound

When the bound volume is returned from the Bindery, update the Binding List.

1. Obtain the SERIAL COPY SET DETAIL screen for the same copy set that you selected parts for.

```
                 SERIAL COPY SET DETAIL                        MASTER

 LCN      :10008609   Call #: UNC                      ISSN: 0009-5982
 Title    :The Chronicle of higher education
 Imprint  :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055


  1. Location    : AL CENTRAL GENERAL c.1
  2. Status      : ACTIVE - Y  Outstanding Claims
  3. Current PO# :
  4. Actual Cost :
  5. Vendor Code : FAXON
  6. Ship To     : UNIT5
  7. Clm Code    : 21day
  8. Routing ID  : P91000170
  9. Notes       : Purchase copy


Options:
  # line   Line by line   Routing list   Binding list   Type of holdings
  File    Quit holdings   ? Help   Exit
```

2. Select the *Binding List* option. The Binding List screen appears.

```
            BINDING LIST                              MASTER

 LCN       :10008609   Call #: UNC                  ISSN: 0009-5982
 Title     :The Chronicle of higher education
 Imprint   :[Washington, etc., Chronicle of higher e+    LCCN: sf 80001055
 CAMPUS    :ADVLIB                     LIBRARY: CENTRAL    COPY #: 1


     Enumeration/Chronology                      Status     In Bindery

  1. Vol.44:No.16(JAN:02:1998)                    Received     N
  2. Vol.44:No.15(DEC:12:1997)                    In Bindery   Y
  3. Vol.44:No.14(DEC:05:1997)                    In Bindery   Y
  4. Vol.44:No.13(NOV:28:1997)                    In Bindery   Y
  5. Vol.44:No.12(NOV:21:1997)                    In Bindery   Y
  6. Vol.44:No.11(NOV:14:1997)                    In Bindery   Y
  7. Vol.44:No.10(NOV:07:1997)                    In Bindery   Y
  8. Vol.44:No.9(OCT:31:1997)                     Received     N
  9. Vol.44:No.8(OCT:24:1997)                     Received     N
 10. Vol.44:No.6(OCT:10:1997)                     Received     N
 11. Vol.44:No.4(SEP:26:1997)                     Received     N
 Options:
  Forward   Backward   Update   File   Quit holdings   ? Help   Exit
```

3. Select the *Update* option.

```
                    BINDING LIST                              MASTER

  LCN      :10008609   Call #: UNC                  ISSN: 0009-5982
  Title    :The Chronicle of higher education
  Imprint  :[Washington, etc., Chronicle of higher e+    LCCN: sf 80001055
  CAMPUS   :ADVLIB                    LIBRARY: CENTRAL    COPY #: 1

      Enumeration/Chronology                      Status     In Bindery

   1. Vol.44:No.16(JAN:02:1998)                   Received        N
   2. Vol.44:No.15(DEC:12:1997)                   In Bindery      Y
   3. Vol.44:No.14(DEC:05:1997)                   In Bindery      Y
   4. Vol.44:No.13(NOV:28:1997)                   In Bindery      Y
   5. Vol.44:No.12(NOV:21:1997)                   In Bindery      Y
   6. Vol.44:No.11(NOV:14:1997)                   In Bindery      Y
   7. Vol.44:No.10(NOV:07:1997)                   In Bindery      Y
   8. Vol.44:No.9(OCT:31:1997)                    Received        N
   9. Vol.44:No.8(OCT:24:1997)                    Received        N
  10. Vol.44:No.6(OCT:10:1997)                    Received        N
  11. Vol.44:No.4(SEP:26:1997)                    Received        N


 Is item in BINDERY
```

4. The cursor is positioned at the first line in the *In Bindery* column.
    The system prompts: Is item in BINDERY. For each part that
    has the status In Bindery and is now part of a bound volume,
    change the status from Y to N. The option line appears when you
    have completed the list or if you exit the list.

```
          BINDING LIST                                 MASTER

 LCN      :10008609   Call #: UNC                  ISSN: 0009-5982
 Title    :The Chronicle of higher education
 Imprint  :[Washington, etc., Chronicle of higher e+    LCCN: sf 80001055
 CAMPUS   :ADVLIB                    LIBRARY: CENTRAL   COPY #: 1

     Enumeration/Chronology                         Status    In Bindery

  1. Vol.44:No.16(JAN:02:1998)                     In Bindery     N
  2. Vol.44:No.9(OCT:31:1997)                      Received       N
  3. Vol.44:No.8(OCT:24:1997)                      Received       N
  4. Vol.44:No.6(OCT:10:1997)                      Received       N
  5. Vol.44:No.4(SEP:26:1997)                      Received       N
  6. Vol.44:No.3(SEP:19:1997)                      Received       N
  7. Vol.44:No.2(SEP:12:1997)                      Received       N
  8. Vol.44:No.1(SEP:05:1997)                      Received       N
  9. Vol.43:No.49(AUG:22:1997)                     Received       N


Options:
  Forward   Backward   Update   File   Quit holdings   ? Help   Exit
```

5. *File.* The system prompts: Enter barcode for the bound issues.

```
          BINDING LIST                                 MASTER

 LCN      :10008609   Call #: UNC                  ISSN: 0009-5982
 Title    :The Chronicle of higher education
 Imprint  :[Washington, etc., Chronicle of higher e+    LCCN: sf 80001055
 CAMPUS   :ADVLIB                    LIBRARY: CENTRAL   COPY #: 1

     Enumeration/Chronology                         Status    In Bindery

  1. Vol.44:No.16(JAN:02:1998)                     Received       N
  2. Vol.44:No.15(DEC:12:1997)                     In Bindery     N
  3. Vol.44:No.14(DEC:05:1997)                     In Bindery     N
  4. Vol.44:No.13(NOV:28:1997)                     In Bindery     N
  5. Vol.44:No.12(NOV:21:1997)                     In Bindery     N
  6. Vol.44:No.11(NOV:14:1997)                     In Bindery     N
  7. Vol.44:No.10(NOV:07:1997)                     In Bindery     N
  8. Vol.44:No.9(OCT:31:1997)                      Received       N
  9. Vol.44:No.8(OCT:24:1997)                      Received       N
 10. Vol.44:No.6(OCT:10:1997)                      Received       N
 11. Vol.44:No.4(SEP:26:1997)                      Received       N
 Enter barcode for the bound issues: 39999000677613
```

6. Enter a barcode. When the barcode is accepted the system displays the SERIAL COPY SET DETAIL screen. The system updates the status of the In Bindery parts (whose flags you set to N) to Bound.

   NOTE: Record the barcode number to facilitate searching for the new volume in the next section.

7. Select *Exit*. The SERIAL COPY SET SUMMARY screen appears.

```
              SERIAL COPY SET SUMMARY                        MASTER

LCN     :10008609   Call #: UNC                    ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+    LCCN: sf 80001055

     Physical Location    Collection/Call number/Copy    Vendor    Status
     ----------------     --------------------------     ------    ------
 1.  ADVLIB Central       GENERAL c.1                    FAXON     Claimed
     Notes: Purchase copy
 2.  ADVLIB Central       GENERAL c.2                    FAXON     Claimed
     Notes: Purchase copy
 3.  ADVLIB Central       GENERAL c.3                    JW&S      Claimed
     Notes: Copyright deposit 2nd copy
 4.  ADVLIB Central       GENERAL c.4                    JW&S      Claimed
     Notes: Copyright Deposit 1st copy



4 item(s) in list
Options:
 # item   Add item   Go to   MARC   Limit list   Quit holdings   ? Help
 Exit
```

8. Select the *Go to* option to obtain the Holdings edit options.

Updating the Piece (Changing the status, naming the bound volume, etc.)

When you create a bound volume, you must edit the Pieces record to name the volume. This new name appears:

• in the Online Catalogue,

• on the PIECES SUMMARY screen

• on the PIECES/PARTS SUMMARY screen (when selected from the LOCATION COPY DETAIL screen).

In Serials Checkin, the parts that comprise the bound volume display the status Bound.

```
               SERIAL COPY SET SUMMARY                    MASTER

LCN      :10008609   Call #: UNC                   ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+    LCCN: sf 80001055

      Physical Location      Collection/Call number/Copy    Vendor    Status
      -----------------      --------------------------     ------    ------
 1.  ADVLIB Central          GENERAL c.1                    FAXON     Claimed
     Notes: Purchase copy
 2.  ADVLIB Central          GENERAL c.2                    FAXON     Claimed
     Notes: Purchase copy
 3.  ADVLIB Central          GENERAL c.3                    JW&S      Claimed
     Notes: Copyright deposit 2nd copy
 4.  ADVLIB Central          GENERAL c.4                    JW&S      Claimed
     Notes: Copyright Deposit 1st copy



4 item(s) in list
Options:
 OPAC display   Pieces display   Type of holdings display   Parts display
 Pub. pattern display   Locations display   Serial copy display
 Check-in serials   Bibliographic edit   Order display   Exit
```

1. Select the *Pieces display* option. The PIECES SUMMARY screen appears.

```
              PIECES SUMMARY                               MASTER

 LCN     :10008609  Call #: UNC                 ISSN: 0009-5982
 Title   :The Chronicle of higher education
 Imprint :[Washington, etc., Chronicle of higher e+    LCCN: sf 80001055

      Pieces key        Location Information  Current Status   Numbering   Notes
      ----------        -------------------   --------------   ---------   -----
  1. 39999000677613     ADVLIB Central        In Processing    Vol.44:No.  N
                        GENERAL c.1                            10(NOV:07:
                                                               1997)-Vol.
                                                               44:No.15(D
                                                               EC:12:1997
                                                               )




 1 item(s) in list.
 Options:
  # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
  Quit holdings   ? Help   Exit
```

2. Locate the new bound volume using the Pieces key (barcode). Use the *# item* option to select the record. The PIECES DETAIL screen appears.

    NOTE: If you have numerous pieces records, use the *Limit list* option to quickly locate the records.

```
                  Online Catalogue PIECES DETAIL - MULTIPART
Local Control #:  10008609                          Format  : SE
Status     : In Processing
Title      : The Chronicle of higher education
Author     : Editorial Projects for Education, Inc.
Updated By :                   Patron  :            Last out:
Update Date: 03/18/98  11:45am Due Date:            Created : 03/18/98
Inventory  :                   Due Time:            Circ Cnt: 0 (0)

 1. Barcode      : 39999000555
 2. Current Locn : AL CENTRAL GENERAL c.1
 3. Owning Locn  : AL CENTRAL GENERAL
 4. Volume/Part# : Vol.44:No.8(OCT:24:1997)-Vol.44:No.15(DEC:12:1997)
 5. Bound Label  : Vol.44 Oct.-Dec.
 6. Pend.Action  :                  11. Physical Cond.:
 7. Circ. Code   :                  12. Accession #   :
 8. Statistics   :                      Current PO#   :
 9. Actual Cost  :
10. Public note 1:

Options:
 # line   Line by line   Notes display   File   Delete   Binding entry
 Circ usage   Status   Print   Card print   Additional parameters
 Quit holdings   ? Help   Exit
```

3. Select the *Bound Label* field (this field needs to be edited only if you want to override what is in the *Volume/Part#* field). If you do not want to use the information in the *Volume/Part#* field on spine labels, enter the appropriate information in the *Bound Label* field. If no information appears in this field the system attempts to print **all** the data in field 4 onto the spine label. Enter the name of the volume as you want it to appear on the printed spine label and in the BRIEF DISPLAY, Level 5 Holdings Display. Use the *Status* option to change the status of the barcoded Piece.

4. *File.* The PIECES SUMMARY screen appears.

```
              PIECES SUMMARY                              MASTER

 LCN     :10008609   Call #: UNC                 ISSN: 0009-5982
 Title   :The Chronicle of higher education
 Imprint :[Washington, etc., Chronicle of higher e+    LCCN: sf 80001055

      Pieces key       Location Information  Current Status   Numbering    Notes
      ----------       -------------------- --------------   ---------   -----
  1.  39999000555      ADVLIB Central        In Processing    Vol.44       N
                       GENERAL c.1                            Oct.-Dec.




 1 item(s) in list.
 Options:
  # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
  Quit holdings   ? Help   Exit
```

5. If you changed the label, the new bound label appears in the
   Numbering column.

Updating Bound Volumes

If a part is not linked to the piece, you can manually link the part to the
piece record.

1. At the *Volume/Part#* field enter ??. The LINKED PARTS screen
   appears.

```
           LINKED PARTS                              MASTER

LCN     :10008609  Call #: UNC                  ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+    LCCN: sf 80001055

     Part Number          Type of Holding
     -----------          ---------------
 1.  Vol.44:No.15(DEC:12:  Paper - ISS
     1997)
 2.  Vol.44:No.14(DEC:05:  Paper - ISS
     1997)
 3.  Vol.44:No.13(NOV:28:  Paper - ISS
     1997)
 4.  Vol.44:No.12(NOV:21:  Paper - ISS
     1997)
 5.  Vol.44:No.11(NOV:14:  Paper - ISS
     1997)

6 item(s) in list
Options:
 # item   Link   Unlink item(s)   Accept   Forward   Limit list
 Quit holdings   ? Help   Exit
```

2. Select the *Link* option. The LINK PARTS TO PIECE screen appears.

```
               LINK PARTS TO PIECE                          MASTER

LCN     :10008609   Call #: UNC                    ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+    LCCN: sf 80001055

     Part number      Type               Status        Barcoded  Link?
     -----------      ----               ------        --------  -----
 1.  Vol.44:No.17(JA  Paper              Exp issue     N         N
     N:09:1998)
 2.  Vol.44:No.16(JA  Paper              Received      N         N
     N:02:1998)
 3.  Vol.44:No.15(DE  Paper              Bound         Y         Y
     C:12:1997)
 4.  Vol.44:No.14(DE  Paper              Bound         Y         Y
     C:05:1997)
 5.  Vol.44:No.13(NO  Paper              Bound         Y         Y
     V:28:1997)

18 item(s) in list
Options:
 Retrieve item(s)   # item   Insert at line #   Mark item(s)   Forward
 Limit list   Quit holdings   ? Help   Exit
```

3. This screen displays all parts defined for the title and the status of each part as it applies to the location defined in the piece (that is the part may be received at one location but not at the location that your piece is for). All the parts that are contained in the bound volume display a Y in the *Link?* column. *(*When both the *Link?* and *Barcoded* columns display Y, it means that the part is linked to this barcode number.). Select the *Retrieve item(s)* option and enter the line number of the item(s) you want to link. <Enter>. The LINKED PARTS screen appears.

```
              LINKED PARTS                                MASTER

LCN      :10008609   Call #: UNC                   ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

        Part Number          Type of Holding
        -----------          ---------------
  1.  Vol.44:No.15(DEC:12:   Paper - ISS
      1997)
  2.  Vol.44:No.14(DEC:05:   Paper - ISS
      1997)
  3.  Vol.44:No.13(NOV:28:   Paper - ISS
      1997)
  4.  Vol.44:No.12(NOV:21:   Paper - ISS
      1997)
  5.  Vol.44:No.11(NOV:14:   Paper - ISS
      1997)

8 item(s) in list
Options:
 # item   Link   Unlink item(s)   Accept   Forward   Limit list
 Quit holdings   ? Help   Exit
```

4. Select *Accept*. The PIECES DETAIL screen appears. Select *File* from the PIECES DETAIL screen. The Bound volume now has 8 parts linked to it.

Creating Bound Volumes Manually

To create a bound volume manually, you must either add a piece or select an existing piece from the PIECES SUMMARY screen and then link the Parts (that make up the bound volume) to the piece.

This example assumes you do not have the serials control module. The options *Serials copy display* and *Check-in serials* are not available from Holdings edit.

1. From the search screen select Holdings edit. The option line changes.

```
                     Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10008609
LCCN            :sf 80001055
ISSN            :0009-5982
AUTHOR          :Editorial Projects for Education, Inc.
TITLE           :The Chronicle of higher education
Pub/Size        :Chronicle of higher education, etc.] 43 cm.
LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
            Vol.44:No.4(SEP:26:1997),Vol.44:No.6(OCT:10:1997),
            Vol.44:No.9(OCT:31:1997)-Vol.44:No.16(JAN:02:1998)
 4.  ADVLIB Central GENERAL c.4 /Regular print
     Paper: Vol.43:No.49(AUG:22:1997),Vol.44:No.2(SEP:12:1997)-
            Vol.44:No.4(SEP:26:1997),Vol.44:No.9(OCT:31:1997)-
            Vol.44:No.16(JAN:02:1998)



4 item(s) in list.
Options:
 # item   Backward   Prior screen   Holdings edit   Full display
 Extend search   Limit list   Output   MARC   Order display   Review search
 OPAC parms   New search   Reset   ? Help
```

```
                       Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10008609
LCCN          :sf 80001055
ISSN          :0009-5982
AUTHOR        :Editorial Projects for Education, Inc.
TITLE         :The Chronicle of higher education
Pub/Size      :Chronicle of higher education, etc.] 43 cm.
LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
          Vol.44:No.4(SEP:26:1997),Vol.44:No.6(OCT:10:1997),
          Vol.44:No.9(OCT:31:1997)-Vol.44:No.16(JAN:02:1998)
 4.  ADVLIB Central GENERAL c.4 /Regular print
     Paper: Vol.43:No.49(AUG:22:1997),Vol.44:No.2(SEP:12:1997)-
          Vol.44:No.4(SEP:26:1997),Vol.44:No.9(OCT:31:1997)-
          Vol.44:No.16(JAN:02:1998)


4 item(s) in list.
Options:
 OPAC display   Pieces display   Type of holdings display   Parts display
 Pub. pattern display   Locations display   Bibliographic edit
 Order display   Exit
```

> 2. Select the *Pieces display* option. The PIECES SUMMARY screen appears

```
                                         PIECES SUMMARY
 MASTER

 LCN     :10008609  Call #: UNC                    ISSN: 0009-5982
 Title   :The Chronicle of higher education
 Imprint :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055

     Pieces key     Location Information  Current Status   Numbering   Notes
     ----------     --------------------  --------------   ---------   -----
 1.  39999000555    ADVLIB Central        In Processing    Vol.44      N
                    GENERAL c.1                            Oct.-Dec.
 2.  39999000777    ADVLIB Central        In Processing    Vol.44:No.  N
                    GENERAL c.1                            16(JAN:02:
                                                           1998)


2 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

3. Select the *Add item* option. (This allows you to create a new barcoded piece that in this example will be a bound volume.) A new PIECES DETAIL screen appears. The *Barcode* field will be blank but the system may provide generic information for some fields. For example, if all the pieces have a common owning location, the system assumes the new piece will also belong to that location.

```
                  Online Catalogue PIECES DETAIL - MULTIPART
Local Control #:  10008609                          Format  : SE
Status     : In Library
Title      : The Chronicle of higher education
Author     : Editorial Projects for Education, Inc.
Updated By :                 Patron  :            Last out:
Update Date:                 Due Date:            Created :
Inventory  :                 Due Time:            Circ Cnt: 0 (0)
** New record **
 1. Barcode     : 39999000333
 2. Current Locn : AL CENTRAL GENERAL c.3
 3. Owning Locn  : AL CENTRAL GENERAL
 4. Volume/Part# :
 5. Bound Label  :
 6. Pend.Action  :                  11. Physical Cond.:
 7. Circ. Code   : LCGEN=GENERAL COLLE 12. Accession #   :
 8. Statistics   :                      Current PO#    :
 9. Actual Cost  :
10. Public note 1:

Options:
 # line   Line by line   Notes display   File   Delete   Binding entry
 Circ usage   Status   Print   Card print   Additional parameters
 Quit holdings   ? Help   Exit
```

4. Enter a barcode and the Current Location. At the *Volume/Part#* field enter ??. The LINKED PARTS screen appears.

```
              LINKED PARTS                               MASTER

LCN     :10008609  Call #: UNC                  ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055

     Part Number          Type of Holding
     -----------          ---------------












0 item(s) in list
Options:
 Link   Unlink item(s)   Accept   Limit list   Quit holdings   ? Help
 Exit
```

5. Select the *Link* option. The LINK PARTS TO PIECE screen appears. (When the LINKED PARTS screen is empty, it means no parts are currently linked to the barcode. If you were adding a part to an existing barcode that had linked parts, those parts would appear on this screen.)

```
                   LINK PARTS TO PIECE                        MASTER

LCN      :10008609   Call #: UNC                       ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+    LCCN: sf 80001055

        Part number      Type                Status        Barcoded  Link?
        -----------      ----                ------        --------  -----
  6.  Vol.44:No.12(NO   Paper               Received       N         N
      V:21:1997)
  7.  Vol.44:No.11(NO   Paper               Received       N         N
      V:14:1997)
  8.  Vol.44:No.10(NO   Paper               Received       N         N
      V:07:1997)
  9.  Vol.44:No.9(OCT   Paper               Received       N         N
      :31:1997)
 10.  Vol.44:No.8(OCT   Paper               Item due       N         N
      :24:1997)

18 item(s) in list
Options: 5-8
 Retrieve item(s)   # item   Insert at line #   Mark item(s)   Forward
 Backward   Limit list   Quit holdings   ? Help   Exit
```

6. Use the *Retrieve item(s)* option to choose the parts you want to be bound in this volume. (This screen displays all the parts for this title.) The LINKED PARTS screen displays.

NOTE: If the status *Not expected* appears under the Status column, it indicates that the title was not expected at this location. If you have added a new location and the title has not been ordered or expected, then the system displays this status. You should only bind parts that have the status *Received.*

```
            LINKED PARTS                              MASTER

LCN      :10008609   Call #: UNC                 ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

      Part Number          Type of Holding
      -----------          ---------------
 1.  Vol.44:No.13(NOV:28:  Paper - ISS
     1997)
 2.  Vol.44:No.12(NOV:21:  Paper - ISS
     1997)
 3.  Vol.44:No.11(NOV:14:  Paper - ISS
     1997)
 4.  Vol.44:No.10(NOV:07:  Paper - ISS
     1997)



4 item(s) in list
Options:
 # item   Link   Unlink item(s)   Accept   Limit list   Quit holdings
 ? Help   Exit
```

7. Select the *Accept* option. (The parts listed form the bound volume.) The PIECES DETAIL screen appears.

```
                  Online Catalogue PIECES DETAIL - MULTIPART
  Local Control #:  10008609                           Format  : SE
  Status     : In Library
  Title      : The Chronicle of higher education
  Author     : Editorial Projects for Education, Inc.
  Updated By :                 Patron  :              Last out:
  Update Date:                 Due Date:              Created :
  Inventory  :                 Due Time:              Circ Cnt: 0 (0)
  ** New record **
   1. Barcode      : 39999000333
   2. Current Locn : AL CENTRAL GENERAL c.3
   3. Owning Locn  : AL CENTRAL GENERAL
   4. Volume/Part# : Vol.44:No.10(NOV:07:1997)-Vol.44:No.13(NOV:28:1997)
   5. Bound Label  : Nov. 1997
   6. Pend.Action  :                      11. Physical Cond.:
   7. Circ. Code   : LCGEN=GENERAL COLLE 12. Accession #   :
   8. Statistics   :                          Current PO#   :
   9. Actual Cost  :
  10. Public note 1:


 Options:
   # line   Line by line   Notes display   File   Delete   Binding entry
   Circ usage   Status   Print   Card print   Additional parameters
   Quit holdings   ? Help   Exit
```

8. The system lists the linked parts in the *Volume/Part#* field. Enter a label for the volume in the *Bound Label* field, if you want to override the contents of the *Volume/Part#* field when the piece's numbering is displayed. If you do not want to use the information in the *Volume/Part#* field on spine labels, enter the appropriate information in the *Bound Label* field. If no information appears in this field the system attempts to print **all** the data in field 4 onto the spine label. Complete the record and *File*. The PIECES SUMMARY screen appears.

NOTE: If the message:

`Update owning info from current info (Y/N) ? :`

appears when you *File* and you answer Y, the system will use the location copy information for the Current Location and insert these values in the Institution, Sublocation, Collection, Call Number, Call Number prefix, Call Number suffix and Circulation Code fields for the Owning Location.

```
                 PIECES SUMMARY                                MASTER
 LCN      :10008609   Call #: UNC                  ISSN: 0009-5982
 Title    :The Chronicle of higher education
 Imprint  :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055

      Pieces key       Location Information  Current Status   Numbering     Notes
      ----------       -------------------- --------------   ---------     -----
  1.  39999000777      ADVLIB Central       In Processing    Vol.43        N
                       GENERAL c.1                           (Aug-Sep)
  2.  39999000555      ADVLIB Central       In Processing    Vol.44        N
                       GENERAL c.2                           Oct.-Dec.
  3.  39999000333      ADVLIB Central       Available        Nov. 1997     N
                       GENERAL c.3




 3 item(s) in list.
 Options:
  # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
  Quit holdings   ? Help   Exit
```

9. The new volume appears on the PIECES SUMMARY screen.

Holdings Statements

Holdings are updated by the system immediately as parts are received. All holdings for all copy sets appear in the Online Catalogue along with the last received item.

To view the holdings for a specific copy at a specific location use the *Holdings statement* option from the LOCATION COPY DETAIL screen.

```
            LOCATION COPY SUMMARY                      MASTER

LCN      :10008609   Call #: UNC                 ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+    LCCN: sf 80001055

     Physical Location     Collection/Call number/Copy     Format
     -----------------     --------------------------      ------
 1.  ADVLIB Central        GENERAL c.1                     Regular print
 2.  ADVLIB Central        GENERAL c.2                     Regular print
 3.  ADVLIB Central        GENERAL c.3                     Regular print
 4.  ADVLIB Central        GENERAL c.4                     Regular print



4 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

1. From the LOCATION COPY SUMMARY screen, use the # item option to select a specific location copy. The LOCATION COPY DETAIL screen appears.

```
            LOCATION COPY DETAIL                          MASTER

 LCN      :10008609   Call #: UNC                     ISSN: 0009-5982
 Title    :The Chronicle of higher education
 Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055


  LOCCPY key :  10031561
  1. Institution    : AL=ADVANCE Libra  9. Coded Location     :
  2. Sublocation    : CENTRAL=Central  10. Non-coded Location :
  3. Collection code : GENERAL=General 11. Classification src.:
  4. Call # prefix   :                 12. Shelving Title    :
  5. Call number     :                 13. Copyright fee code :
  6. Call # suffix   :                 14. Materials specified:
  7. Copy number     : 4               15. Placeholder only  : N
  8. Retention policy: 0               16. Physical format    : ta



Options:
  # line   Line by line   Pieces / Parts   Holdings statement
  MARC Holdings   Binding information   File   Delete   Quit holdings
  ? Help   Exit
```

2. Select the *Holdings statement* option. The TYPE OF HOLDING
   SUMMARY screen appears.

```
            TYPE OF HOLDING SUMMARY                       MASTER

 LCN     :10008609   Call #: UNC                      ISSN: 0009-5982
 Title   :The Chronicle of higher education
 Imprint :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

     Description                   Holdings statement
     -----------                   ------------------
 1.  Paper                         Vol.43:No.49(AUG:22:1997),
                                   Vol.44:No.2(SEP:12:1997)-Vol.44:No.4(SEP
                                   :26:1997),
                                   Vol.44:No.9(OCT:31:1997)-Vol.44:No.16(JA
                                   N:02:1998)
 2.  Loose-Leaf                    No.6(1998:SEP)-No.10(1999:JAN),
                                   No.12(1999:MAR)
 3.  General Index                 1995 1996 1997


 3 item(s) in list
 Options:
  # item   Accept   Limit list   Quit holdings   ? Help   Exit
```

3. The system displays the holdings statements grouped by type of holding. To suppress the holdings statement or override the holdings statement from the Online Catalogue see *Adding Retrospective Holdings Statements* on page 4-89.

Adding Retrospective Holdings Statements

The system builds a holdings statement based on which parts are held at a location. You may want to add a note describing retrospective holdings that will display before the holdings statement generated (built) by the system. In some cases you may want to suppress the display of the system generated holdings by entering a manual override note into the holdings statement. The retrospective note and manual override note can be applied at either the Type of Holding or Publication Pattern levels. Some common examples are:

• retrospective note at the Type of Holding level

• manual override at the Type of holding level

• retrospective note at the publication pattern level

• manual override at the publication pattern level.

Example Displays

The following examples illustrate the differences in the OPAC display in the following:

• default display

• holdings suppressed at the TYPE OF HOLDINGS level

• holdings suppressed at the PUBLICATION PATTERN level.

Default Display   The following screen is the default display for a title with three types of holdings: paper issues, loose-leaf and general index. On this screen, all the parts for each type of holding are shown.

```
                       Online Catalogue - BRIEF DISPLAY       (1 of 1 titles)
Local Control # :10008609
LCCN            :sf 80001055
ISSN            :0009-5982
AUTHOR          :Editorial Projects for Education, Inc.
TITLE           :The Chronicle of higher education
Pub/Size        :Chronicle of higher education, etc.] 43 cm.
LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 4.  ADVLIB Central GENERAL c.4 /Regular print
      Paper: Vol.43:No.49(AUG:22:1997),Vol.44:No.2(SEP:12:1997)-
             Vol.44:No.4(SEP:26:1997),Vol.44:No.9(OCT:31:1997)-
             Vol.44:No.16(JAN:02:1998) Vol.44:No.20(FEB:15:1998)-
             Vol.45:No.1(MAY:01:1998)
             Last rec'd: Vol.45:No.1(MAY:01:1998) on APR 24, 1998
      Loose-Leaf: Sec.115(1997:SEP)-Sec.118(1998:FEB) V.3:No.2(NOV:1996)-
                  V.3:No.5(APR:1997),V.3:No.7(SEP:1997)
                  Last rec'd: V.3:No.7(SEP:1997) on APR 28, 1998
      General Index: 1995 1996 1997
                    Last rec'd: 1997 on APR 23, 1998
4 item(s) in list.
Options:
 Full display   Backward   # item   Exit
```

Location Copy Holdings
Statement

In this example, the Loose-Leaf parts have been suppressed and the
message *Moved to Reserve Reading Room Until May 1* displays. A
manual override with a textual statement (message) was used to provide
specific information to OPAC patrons at the LOCATION COPY HOLD-
INGS STATEMENT level.

```
                    Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10008609
LCCN           :sf 80001055
ISSN           :0009-5982
AUTHOR         :Editorial Projects for Education, Inc.
TITLE          :The Chronicle of higher education
Pub/Size       :Chronicle of higher education, etc.] 43 cm.
LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 4.  ADVLIB Central GENERAL c.4 /Regular print
     Paper: Vol.43:No.49(AUG:22:1997),Vol.44:No.2(SEP:12:1997)-
            Vol.44:No.4(SEP:26:1997),Vol.44:No.9(OCT:31:1997)-
            Vol.44:No.16(JAN:02:1998) Vol.44:No.20(FEB:15:1998)-
            Vol.45:No.1(MAY:01:1998)
            Last rec'd: Vol.45:No.1(MAY:01:1998) on APR 24, 1998
     Loose-Leaf: Moved to Reserve Reading Room Until May 1.
                 Last rec'd: V.3:No.7(SEP:1997) on APR 28, 1998
     General Index: 1995 1996 1997
                   Last rec'd: 1997 on APR 23, 1998

4 item(s) in list.
Options:
 Full display   Backward   # item   Exit
```

Publication Patterns

In this example, the Loose-Leaf Type of Holding has two publication patterns. One pattern is labelled Sec. and has been replaced with the message `All issues from 1997 to present are in Reading Room`. The other pattern labelled V. still displays. The suppressed pattern uses a manual override with a textual statement to provide specific information to OPAC patrons about all of the parts using the Sec publication pattern.

```
                    Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10008609
LCCN           :sf 80001055
ISSN           :0009-5982
AUTHOR         :Editorial Projects for Education, Inc.
TITLE          :The Chronicle of higher education
Pub/Size       :Chronicle of higher education, etc.] 43 cm.
LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 4.  ADVLIB Central GENERAL c.4 /Regular print
     Paper: Vol.43:No.49(AUG:22:1997),Vol.44:No.2(SEP:12:1997)-
            Vol.44:No.4(SEP:26:1997),Vol.44:No.9(OCT:31:1997)-
            Vol.44:No.16(JAN:02:1998) Vol.44:No.20(FEB:15:1998)-
            Vol.45:No.1(MAY:01:1998)
            Last rec'd: Vol.45:No.1(MAY:01:1998) on APR 24, 1998
     Loose-Leaf: All issues from 1997 to present are in Reading Room
               V.3:No.2(NOV:1996)-V.3:No.5(APR:1997),
               V.3:No.7(SEP:1997)
               Last rec'd: V.3:No.7(SEP:1997) on APR 28, 1998
     General Index: 1995 1996 1997
4 item(s) in list.
Options:
 Full display   Forward   Backward  # item   Exit
```

Procedure

This example illustrates how to suppress holdings information at the Type of Holding level, or at the publication pattern level.

```
               LOCATION COPY DETAIL                          MASTER

LCN      :10008609   Call #: UNC                     ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055


 LOCCPY key :  10031561
 1. Institution    : AL=ADVANCE Libra  9. Coded Location    :
 2. Sublocation    : CENTRAL=Central  10. Non-coded Location :
 3. Collection code : GENERAL=General  11. Classification src.:
 4. Call # prefix   :                  12. Shelving Title    :
 5. Call number    :                   13. Copyright fee code :
 6. Call # suffix   :                  14. Materials specified:
 7. Copy number    : 4                 15. Placeholder only   : N
 8. Retention policy: 0                16. Physical format    : ta




Options:
 # line   Line by line   Pieces / Parts   Holdings statement
 MARC Holdings   Binding information   File   Delete   Quit holdings
 ? Help   Exit
```

1. From the LOCATION COPY DETAIL screen select the *Holdings Statement* option. The Type of Holding Summary screen appears. This screen lists all the types of holdings that have been defined for this location and this title.

```
               TYPE OF HOLDING SUMMARY                      MASTER

 LCN     :10008609   Call #: UNC                    ISSN: 0009-5982
 Title   :The Chronicle of higher education
 Imprint :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055

      Description                    Holdings statement
      -----------                    ------------------
  1.  Paper                          Vol.43:No.49(AUG:22:1997),
                                     Vol.44:No.2(SEP:12:1997)-Vol.44:No.4(SEP
                                     :26:1997),
                                     Vol.44:No.9(OCT:31:1997)-Vol.44:No.16(JA
                                     N:02:1998)
                                     Vol.44:No.20(FEB:15:1998)-Vol.45:No.1(MA
                                     Y:01:1998)
  2.  Loose-Leaf                     Sec.115(1997:SEP)-Sec.118(1998:FEB)
                                     V.3:No.2(NOV:1996)-V.3:No.5(APR:1997),
                                     V.3:No.7(SEP:1997)
  3.  General Index                  1995 1996 1997
 3 item(s) in list
 Options:
  # item   Accept   Limit list   Quit holdings   ? Help   Exit
```

2. Use the *# item* option and enter 2 to select the Loose-Leaf Type of Holding record. The LOCATION COPY HOLDINGS STATEMENT appears.

```
              LOCATION COPY HOLDINGS STATEMENT                    MASTER

LCN      :10008609   Call #: UNC                        ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+       LCCN: sf 80001055


Type of Holding     : Loose-Leaf              Publication Type: 0 - ISS
Supplement/Index Type:
System Generated: Sec.115(1997:SEP)-Sec.118(1998:FEB) V.3:No.2(NOV:1996)-V.3:
                  No.5(APR:1997),V.3:No.7(SEP:1997)



1. Type    : 1-Manual Override
2. Textual : Moved to Reserve Reading Room Until May 1.
   Statement


Publication Pattern Notes : No
Options:
 # line   Line by line   Accept   Quit holdings   ? Help   Exit
```

3. Use the *Line by line* option to edit the fields. Enter `1 - Manual Override` in the *Type* field. Enter a message at the Textual Statement field. Select *Accept*. The TYPE OF HOLDING SUMMARY screen appears. Select *Accept*. The LOCATION COPY DETAIL screen appears. Select *File*. The LOCATION COPY SUMMARY screen appears.

```
                    Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10008609
LCCN           :sf 80001055
ISSN           :0009-5982
AUTHOR         :Editorial Projects for Education, Inc.
TITLE          :The Chronicle of higher education
Pub/Size       :Chronicle of higher education, etc.] 43 cm.
LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 4.  ADVLIB Central GENERAL c.4 /Regular print
     Paper: Vol.43:No.49(AUG:22:1997),Vol.44:No.2(SEP:12:1997)-
            Vol.44:No.4(SEP:26:1997),Vol.44:No.9(OCT:31:1997)-
            Vol.44:No.16(JAN:02:1998) Vol.44:No.20(FEB:15:1998)-
            Vol.45:No.1(MAY:01:1998)
            Last rec'd: Vol.45:No.1(MAY:01:1998) on APR 24, 1998
     Loose-Leaf: Moved to Reserve Reading Room Until May 1.
                 Last rec'd: V.3:No.7(SEP:1997) on APR 28, 1998
     General Index: 1995 1996 1997
4 item(s) in list.
Options:
 Full display   Forward   Backward   # item   Exit
```

4. The message appears in the Online Catalogue.

Publication Patterns

You can display a message in the Online Catalogue for a specific publication pattern by adding a textual statement at the publication pattern level. In this example, Sec. 115(1995:SEP)-Sec. 118(1996:FEB) will be replaced with the message *Items prior to Nov 1996 have been withdrawn*.

```
                TYPE OF HOLDING SUMMARY                      MASTER

LCN     :10008609   Call #: UNC                      ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055

     Description                    Holdings statement
     -----------                    ------------------
 1.  Paper                          Vol.43:No.49(AUG:22:1997),
                                    Vol.44:No.2(SEP:12:1997)-Vol.44:No.4(SEP
                                    :26:1997),
                                    Vol.44:No.9(OCT:31:1997)-Vol.44:No.16(JA
                                    N:02:1998)
                                    Vol.44:No.20(FEB:15:1998)-Vol.45:No.1(MA
                                    Y:01:1998)
 2.  Loose-Leaf                     Sec.115(1995:SEP)-Sec.118(1996:FEB)
                                    V.3:No.2(NOV:1996)-V.3:No.5(APR:1997),
                                    V.3:No.7(SEP:1997)
 3.  General Index                  1995 1996 1997
3 item(s) in list
Options:
 # item   Accept   Limit list   Quit holdings   ? Help   Exit
```

1. From the TYPE OF HOLDING SUMMARY screen use *# item* option to select a type of holding record. The LOCATION COPY HOLDINGS STATEMENT appears.

```
                  LOCATION COPY HOLDINGS STATEMENT              MASTER

LCN      :10008609   Call #: UNC                       ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055


Type of Holding     : Loose-Leaf             Publication Type: 0 - ISS
Supplement/Index Type:
System Generated: Sec.115(1995:SEP)-Sec.118(1996:FEB) V.3:No.2(NOV:1996)-V.3:
                  No.5(APR:1997),V.3:No.7(SEP:1997)



1. Type    :
2. Textual :
   Statement


Publication Pattern Notes : No
Options:
 # line   Line by line   Publication pattern   Accept   Quit holdings
 ? Help   Exit
```

2. Select the *Publication pattern* option. The PUBLICATION PATTERN SUMMARY screen appears.

```
                  PUBLICATION PATTERN SUMMARY                    MASTER

LCN      :10008609   Call #: UNC                    ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055


     Enumeration/Chronology   Frequency      Description
     ---------------------    ---------      -----------
 1.  V.:No.:(Month):(Year)    Monthly        Loose-Leaf
     PUBPAT statement: V.3:No.2(NOV:1996)-V.3:No.5(APR:1997),
     V.3:No.7(SEP:1997)
 2.  Sec.:(year):(month)      Completely     Loose-Leaf
                              irregular
     PUBPAT statement: Sec.115(1995:SEP)-Sec.118(1996:FEB)




2 item(s) in list
Options:
 Retrieve #   Accept   Limit list   Quit holdings   ? Help   Exit
```

3. Use the *Retrieve #* option to select a publication pattern. The LOCA-TION COPY HOLDINGS STATEMENT appears.

```
                LOCATION COPY HOLDINGS STATEMENT             MASTER

LCN      :10008609   Call #: UNC                    ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055


Type of Holding     : Loose-Leaf           Publication Type: 0 - ISS
Publication Pattern : Sec.:(year):(month)    Date Range      :
System Generated: Sec.115(1995:SEP)-Sec.118(1996:FEB)




1. Type     : 1-Manual Override
2. Textual  : Items prior to Nov 1996 have been withdrawn.
   Statement


Options:
 # line   Line by line   Accept   Quit holdings   ? Help   Exit
```

4. Use the *Line by line* option to edit the fields. Enter 1 - Manual Override in the *Type* field. Enter a message at the Textual Statement field. Select *Accept*. The PUBLICATION PATTERN SUMMARY screen appears.

```
            PUBLICATION PATTERN SUMMARY                    MASTER

LCN     :10008609   Call #: UNC                      ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055


     Enumeration/Chronology    Frequency      Description
     ---------------------    ---------     -----------
 1.  V.:No.:(Month):(Year)    Monthly       Loose-Leaf
     PUBPAT statement: V.3:No.2(NOV:1996)-V.3:No.5(APR:1997),
     V.3:No.7(SEP:1997)
 2.  Sec.:(year):(month)      Completely    Loose-Leaf
                              irregular
     PUBPAT statement: Items prior to Nov 1996 have been withdrawn.




2 item(s) in list
Options:
 Retrieve #   Accept   Limit list   Quit holdings   ? Help   Exit
```

5. Select *Accept*. The LOCATION COPY HOLDINGS STATEMENT screen appears.

```
                LOCATION COPY HOLDINGS STATEMENT               MASTER

LCN      :10008609   Call #: UNC                        ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055


Type of Holding     : Loose-Leaf           Publication Type: 0 - ISS
Supplement/Index Type:
System Generated: Sec.115(1997:SEP)-Sec.118(1998:FEB) V.3:No.2(NOV:1996)-V.3:
                  No.5(APR:1997),V.3:No.7(SEP:1997)


1. Type    :
2. Textual :
   Statement


Publication Pattern Notes : Yes
Options:
 # line   Line by line   Publication pattern   Accept   Quit holdings
 ? Help   Exit
```

6. Select *Accept*. The TYPE OF HOLDING SUMMARY screen appears.

```
              TYPE OF HOLDING SUMMARY                      MASTER

 LCN      :10008609   Call #: UNC                    ISSN: 0009-5982
 Title    :The Chronicle of higher education
 Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

      Description                     Holdings statement
      -----------                     ------------------
  1.  Paper                           Vol.43:No.49(AUG:22:1997),
                                      Vol.44:No.2(SEP:12:1997)-Vol.44:No.4(SEP
                                      :26:1997),
                                      Vol.44:No.9(OCT:31:1997)-Vol.44:No.16(JA
                                      N:02:1998)
                                      Vol.44:No.20(FEB:15:1998)-Vol.45:No.1(MA
                                      Y:01:1998)
  2.  Loose-Leaf                      Items prior to Nov 1996 have been
                                      withdrawn.
                                      V.3:No.2(NOV:1996)-V.3:No.5(APR:1997),
                                      V.3:No.7(SEP:1997)
  3.  General Index                   1995 1996 1997
 3 item(s) in list
 Options:
  # item   Accept   Limit list   Quit holdings   ? Help   Exit
```

7. Select *Accept*. The LOCATION COPY DETAIL screen appears.

```
          LOCATION COPY DETAIL                         MASTER

 LCN      :10008609  Call #: UNC                 ISSN: 0009-5982
 Title    :The Chronicle of higher education
 Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055


 LOCCPY key :  10031561
 1. Institution    : AL=ADVANCE Libra  9. Coded Location    :
 2. Sublocation    : CENTRAL=Central  10. Non-coded Location :
 3. Collection code : GENERAL=General  11. Classification src.:
 4. Call # prefix  :                  12. Shelving Title    :
 5. Call number    :                  13. Copyright fee code :
 6. Call # suffix  :                  14. Materials specified:
 7. Copy number    : 4                15. Placeholder only   : N
 8. Retention policy: 0               16. Physical format    : ta




 Options:
  # line   Line by line   Pieces / Parts   Holdings statement
  MARC Holdings   Binding information   File   Delete   Quit holdings
  ? Help   Exit
```

8. Select *File*.

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5

Moving Holdings

The *Move* option is available from several screens in *Holdings edit*:

- Pieces Summary
- Type of Holding Summary
- Location Copy Summary
- Pieces/Parts Summary
- Parts Summary

From within the *Move* function you can search by LCN for a bibliographic record or search by OPAC search command for a bibliographic record. If you are moving between locations, you can select a new location from the Location Copy Summary screen.

For example, the *Move* option allows you to move:

- all the holdings on a Location copy record to another title. For example, if a publication changes its title, you might move all the holdings to the new title.

- parts/pieces from one location to another title or to another location with this title. For example, you might move all parts to off site storage.

- parts records to another type of holding. For example, if you have the same title in two different physical formats, such as paper and microfiche, you can move all the paper parts to one Type of Holding record and all microfiche parts to another. Then, you would have separate publication patterns and predictions for each format. In the Online Catalogue, these formats would display in separate groups.

- type of holdings record to another title. For example, if a publication has a title split, by moving the type of holdings record to the new title you automatically move all the parts associated with the type of

holdings record to the new title without having to move parts individually.

- all holdings from one title to another title. For example, you can move all the holdings on one bibliographic record to another bibliographic record.

- move some of your pieces or parts to another location. For example, you might move some of your copies of a title to a branch location.

Moving Single-part Holdings

Single-part holdings can be moved:

- from one bibliographic record to another

- from one location copy record to another. For a single copy title, edit the location on the piece record instead of using the move command. Use the move command when you want to move several pieces to a new location or you want to move electronic titles.

NOTE: Single-part holdings cannot be moved to a multipart record or to a Fast Add title.

Task Summary

1. Obtain the PIECES SUMMARY screen by:

   - selecting the *Holdings edit* option and then choosing the *Pieces display* option, or

   - selecting the *Go to* option from any Summary screen and choosing the *Pieces display* option.

2. Select the *Move #(s)* option and enter the line number(s) for the pieces you want to move.

3. Enter L (Location) or B (Bibliographic) at the move prompt.

4. Enter Y on the confirmation prompt.

5. Retrieve the Location or search for and *Retrieve* the Bibliographic record.

6. The pieces are moved to a different location copy or a different bibliographic title.

Task Details -— Moving Holdings from One Bibliographic Record to Another

1. Go to the PIECES SUMMARY screen.

```
             PIECES SUMMARY                              MASTER

 LCN      :10003333  Call #: Z678.9.G45 1984            ISSN:
 Title    :Integrated online library systems : principles, planning, and impl+
 Imprint  :White Plains, NY : Knowledge Industry Pu+      LCCN: 84015406 //r9

      Pieces key       Location Information  Current Status   Numbering   Notes
      ----------       -------------------- --------------   ---------   -----
  1.  00017762859      ADVLIB Central        In Processing                 N
                       GEN-STAFF c.3
  2.  39999000222      ADVLIB Central        In Library                    N
                       GENERAL
  3.  39990001211      ADVLIB Central        In Library                    N
                       GENERAL
  4.  00035778843      ADVLIB Central        DUE: 02/26/98                 N
                       GENERAL c.2
      Staff notes: Send for deacidification Lot 651 / Rebind after
      deacidification / deacidify / 19970502 / DLC / bind / 19970804 / DLC

 4 item(s) in list.
 Options:
  # item   Add item   Delete item(s)   Move #(s)   Multipart/serial   Go to
  Limit list   Quit holdings   ? Help   Exit
```

2. Select the *Move #(s)* option and enter the line numbers, 2–3, because items 2 and 3 are being moved.

```
              PIECES SUMMARY                            MASTER

LCN      :10003333  Call #: Z678.9.G45 1984            ISSN:
Title    :Integrated online library systems : principles, planning, and impl+
Imprint  :White Plains, NY : Knowledge Industry Pu+      LCCN: 84015406 //r9

      Pieces key      Location Information  Current Status   Numbering   Notes
      ----------      -------------------- --------------   ---------   -----
 1.  00017762859     ADVLIB Central       In Processing                  N
                     GEN-STAFF c.3
 2.  39999000222     ADVLIB Central       In Library                     N
                     GENERAL
 3.  39990001211     ADVLIB Central       In Library                     N
                     GENERAL
 4.  00035778843     ADVLIB Central       DUE: 02/26/98                  N
                     GENERAL c.2
     Staff notes: Send for deacidification Lot 651 / Rebind after
     deacidification / deacidify / 19970502 / DLC / bind / 19970804 / DLC

4 item(s) in list.

Move to new Bibliographic record (B) or to new Location (L)?    B
Select 'B' to move holdings to another bibliographic record
Select 'L' to move holdings to another location on this bib
```

3. The system prompts for a choice to move to a new Bibliographic record (B) or a new Location (L). Enter B.

```
             PIECES SUMMARY                                MASTER

 LCN     :10003333  Call #: Z678.9.G45 1984             ISSN:
 Title   :Integrated online library systems : principles, planning, and impl+
 Imprint :White Plains, NY : Knowledge Industry Pu+     LCCN: 84015406 //r9

        Pieces key       Location Information  Current Status   Numbering   Notes
        ----------       --------------------  --------------   ---------   -----
 1.  00017762859     ADVLIB Central       In Processing                  N
                     GEN-STAFF c.3
 2.  39999000222     ADVLIB Central       In Library                     N
                     GENERAL
 3.  39990001211     ADVLIB Central       In Library                     N
                     GENERAL
 4.  00035778843     ADVLIB Central       DUE: 02/26/98                  N
                     GENERAL c.2
     Staff notes: Send for deacidification Lot 651 / Rebind after
     deacidification / deacidify / 19970502 / DLC / bind / 19970804 / DLC

Checking order status and permissions, please be patient


2 of 2 can be moved. Move them (Y/N)? y
```

4. The system checks permissions and prompts: `2 of 2 can be moved. Move it (Y/N)?` Enter `Y` to move the items.

```
              PIECES SUMMARY                               MASTER

LCN     :10003333  Call #: Z678.9.G45 1984            ISSN:
Title   :Integrated online library systems : principles, planning, and impl+
Imprint :White Plains, NY : Knowledge Industry Pu+        LCCN: 84015406 //r9

      Pieces key       Location Information  Current Status   Numbering   Notes
      ----------       -------------------- --------------   ---------   -----
  1.  00017762859      ADVLIB Central       In Processing                  N
                       GEN-STAFF c.3
  2.  39999000222      ADVLIB Central       In Library                     N
                       GENERAL
  3.  39990001211      ADVLIB Central       In Library                     N
                       GENERAL
  4.  00035778843      ADVLIB Central       DUE: 02/26/98                  N
                       GENERAL c.2
      Staff notes: Send for deacidification Lot 651 / Rebind after
      deacidification / deacidify / 19970502 / DLC / bind / 19970804 / DLC




Enter new LCN or search string :  10008117
```

5. The system prompts you for a Local Control Number (LCN) or search string. If you enter a LCN, ADVANCE moves the record immediately. If you search, you must retrieve the bibliographic record by selecting the *Retrieve* option from the OPAC DETAILED DISPLAY screen.

```
                   PIECES SUMMARY                              MASTER

 LCN     :10003333  Call #: Z678.9.G45 1984              ISSN:
 Title   :Integrated online library systems : principles, planning, and impl+
 Imprint :White Plains, NY : Knowledge Industry Pu+       LCCN: 84015406 //r9

      Pieces key       Location Information Current Status   Numbering   Notes
      ----------       -------------------- --------------   ---------   -----
 1.  00017762859       ADVLIB Central       In Processing                  N
                       GEN-STAFF c.3
 2.  39999000222       ADVLIB Central       In Library                     N
                       GENERAL
 3.  39990001211       ADVLIB Central       In Library                     N
                       GENERAL
 4.  00035778843       ADVLIB Central       DUE: 02/26/98                  N
                       GENERAL c.2
      Staff notes: Send for deacidification Lot 651 / Rebind after
      deacidification / deacidify / 19970502 / DLC / bind / 19970804 / DLC

 2 holdings moved from 10003333 to 10008117
 Press <ENTER>
```

6. When the item has been moved to the new bibliographic record the system displays the message: 2 holdings moved from [source LCN] to [target LCN].<Enter> to return to the PIECES SUMMARY screen.

```
                   PIECES SUMMARY                              MASTER

 LCN     :10003333  Call #: Z678.9.G45 1984              ISSN:
 Title   :Integrated online library systems : principles, planning, and impl+
 Imprint :White Plains, NY : Knowledge Industry Pu+       LCCN: 84015406 //r9

      Pieces key       Location Information Current Status   Numbering   Notes
      ----------       -------------------- --------------   ---------   -----
 1.  00017762859       ADVLIB Central       In Processing                  N
                       GEN-STAFF c.3
 2.  00035778843       ADVLIB Central       DUE: 02/26/98                  N
                       GENERAL c.2
      Staff notes: Send for deacidification Lot 651 / Rebind after
      deacidification / deacidify / 19970502 / DLC / bind / 19970804 / DLC


 2 item(s) in list.
 Options:
  # item   Add item   Delete item(s)   Move #(s)   Multipart/serial   Go to
  Limit list   Quit holdings   ? Help   Exit
```

Moving Multipart/Serial Holdings

The *Move* option is available from several screens in *Holdings edit*. Move functions differ depending on the holdings records being moved. Move allows you to move holdings to a different bibliographic record, to another location, or to a different Type of Holding record. For clarity, the term source is used to refer to the record from which the holdings are being moved, and the term target is used to refer to the record to which the holdings are being moved.

NOTE: When you move holdings between bibliographic records, you can use an OPAC search command, such as `tw = smith`, or a Local Control Number (LCN) to search for the bibliographic record that you are moving holdings to.

Screen	Type of Move	Allowed Action
Parts Summary (from Type of Holding Detail screen)	Parts	Move to a Type of Holding only.
Type of Holding Summary	Bibliographic	Move to a bibliographic record only.
Location Copy Summary	Bibliographic only	Move to another bibliographic record only.
Pieces/Parts from the Location Copy Detail	Bibliographic	Move to a bibliographic record.
Pieces/Parts from the Location Copy Detail	Location	Move to a location copy record.
Pieces Summary	Bibliographic	Move to a bibliographic record.
Pieces Summary	Location	Move to a location copy record.
Parts Summary	Not Available	
Publication Pattern	Not Available	

Moving Parts to a Different Type of Holding Record

Purpose

In this example, there are holdings starting from 1990 for the title, *American Environment*. The annual indexes for the title were never set up to be predicted but rather were just checked in as they arrived and interfiled with the regular quarterly issues. It has been decided to move the parts for the annual indexes to a new Type of Holding called Indexes so holdings for Issues and Indexes display separately.

Task Summary

1. From Holdings edit obtain the TYPE OF HOLDING SUMMARY screen.

2. Select the Type of Holding record that contains the parts you want to move.

3. Select the *Parts* option.

4. Select the *Move #(s)* option to select the parts you want to move.

5. The system prompts you for confirmation to move the parts. Enter Y.

6. Select the *Add item* option.

7. Edit the numbered fields. *File*.

8. Retrieve the Type of Holding record that you want to move the parts to.

9. The system prompts you for the position where the parts will be inserted. Enter Y or N. The move is now complete.

10. Select the *Exit* option.

11. Select the *Exit* option.

12. If you want to see the parts that were moved or make changes to the publication pattern (captions, frequency) for the parts on the new Indexes Type of Holding, continue with these steps, otherwise skip to step 21. Select the new Type of Holding record.

13. Select the *Parts* option to see the parts that were moved to the new Type of Holding.

14. Select the *Exit* option

15. Select the *Patterns* option to see the list of publication patterns that the new Type of Holding is using.

16. Select the new publication pattern record.

17. Edit the publication pattern to reflect the enumeration and chronology of the Indexes. When you are finished updating the publication pattern, choose the *File* option.

18. Answer N to the prompt Do you want to retain the old record ? (Y/N)

19. Select the *Exit* option.

20. Select the *Exit* option.

21. To see how the holdings display in the OPAC, select the *Go to* option. The system repaints the option line.

22. Choose the *OPAC display* option. The system responds by displaying the holdings. Notice that the holdings for Issues and Indexes are now separated.

Procedure

1. From *Holdings edit* obtain the TYPE OF HOLDING SUMMARY screen.

```
                  Online Catalogue TYPE OF HOLDING SUMMARY
Local Control #:  10009216                             Format  : SE
Title     : American environment : a publication of the American Society
Author    : American Society for Environmental Education
Publisher : American Society for Environmental Education, 1987
ISBN/ISSN : 0894-1394
Last update: 05 NOV 1993 System

     Description                     Type  Supplement/Index type
     -----------                     ----  --------------------
  1. Issues                          ISS
     Captions/Labels: v.:iss.:(Year):(Mo.)




1 item(s) in list
Options:  1
  # item   Add item   Delete item(s)   Sequence TOHs   Move #(s)   Go to
  Limit list   Quit holdings   ? Help   Exit
```

2. Select *# item* to select the Type of Holding Record that contains the parts you want to move. The TYPE OF HOLDING DETAIL screen appears.

```
                   Online Catalogue TYPE OF HOLDING DETAIL
Local Control #:  10009216                            Format  : SE
Title     : American environment : a publication of the American Society
Author    : American Society for Environmental Education
Publisher : American Society for Environmental Education, 1987
ISBN/ISSN : 0894-1394

 1. Description        : Issues              3. Publication Type: 0  - ISS
 2. Supplement/Index Type:
                            ** ACTIVE **   - (1 of 1 Publication Patterns)
 Enumeration       Level 1    Level 2   Level 3   Level 4  Level 5  Level 6
  Caption       : v.         iss.
  Alternate Caption:

 Chronology        Level 1    Level 2   Level 3   Level 4
  Caption       : (Year)     (Mo.)
  Alternate Caption:
 Frequency : q  - Quarterly
 Notes     :

Options:
  # line   Line by line   Patterns   Parts   Delete   File   Quit holdings
  ? Help   Exit
```

3. Select the *Parts* option. The PARTS SUMMARY screen appears and displays all the parts that are currently linked to this type of holding. Use the *Forward* and *Backward* options to determine the line numbers of the parts that you want to move. In this example, the parts on lines 4, 9, 14, 19, 24, 29, 34, and 39 will be moved.

```
                     Online Catalogue PARTS SUMMARY
Local Control #:  10009216                             Format  : SE
Title      : American environment : a publication of the American Society
Author     : American Society for Environmental Education
Publisher  : American Society for Environmental Education, 1987
ISBN/ISSN  : 0894-1394
Last update: 05 NOV 1993 System


     Part Number           Type of Holding
     -----------           ---------------
  1.  v.98:iss.3(1998:JUL)  Issues - ISS
  2.  v.98:iss.2(1998:APR)  Issues - ISS
  3.  v.98:iss.1(1998:JAN)  Issues - ISS
  4.  1997                  Issues - ISS
  5.  v.97:iss.4(1997:OCT)  Issues - ISS
  6.  v.97:iss.3(1997:JUL)  Issues - ISS
  7.  v.97:iss.2(1997:APR)  Issues - ISS
  8.  v.97:iss.1(1997:JAN)  Issues - ISS
  9.  1996                  Issues - ISS
43 item(s) in list
Options:  4,9,14,19,24,29,34,39
  Sequence parts   Move #(s)   # item   Insert at line #   Forward
  Limit list   Quit holdings   ? Help   Exit
```

4. Select *Move #(s)* and enter the line numbers of the parts you want to move, in this case, 4,9,14,19,24,29,34,39. The option line is replaced by a prompt:

    8 of 8 can be moved. Do you want to move them (Y/N)?

```
                        Online Catalogue PARTS SUMMARY
Local Control #:  10009216                              Format  : SE
Title     : American environment : a publication of the American Society
Author    : American Society for Environmental Education
Publisher : American Society for Environmental Education, 1987
ISBN/ISSN  : 0894-1394
Last update: 05 NOV 1993 System

       Part Number          Type of Holding
       -----------          ---------------
  1.  v.98:iss.3(1998:JUL)  Issues - ISS
  2.  v.98:iss.2(1998:APR)  Issues - ISS
  3.  v.98:iss.1(1998:JAN)  Issues - ISS
  4.  1997                  Issues - ISS
  5.  v.97:iss.4(1997:OCT)  Issues - ISS
  6.  v.97:iss.3(1997:JUL)  Issues - ISS
  7.  v.97:iss.2(1997:APR)  Issues - ISS
  8.  v.97:iss.1(1997:JAN)  Issues - ISS
  9.  1996                  Issues - ISS
43 item(s) in list


8 of 8 can be moved. Do you want to move them (Y/N)? Y
```

5. Enter Y. The TYPE OF HOLDING SUMMARY screen appears.

```
                  Online Catalogue TYPE OF HOLDING SUMMARY
Local Control #:  10009216                              Format  : SE
Title     : American environment : a publication of the American Society
Author    : American Society for Environmental Education
Publisher : American Society for Environmental Education, 1987
ISBN/ISSN  : 0894-1394
Last update: 05 NOV 1993 System

       Description                  Type  Supplement/Index type
       -----------                  ----  ---------------------
  1** Issues                        ISS
       Captions/Labels: v.:iss.:(Year):(Mo.)




1 item(s) in list
Options:
  Retrieve #   # item   Add item   Limit list   Quit holdings   ? Help
  Exit
```

6. Select *Add item*. The TYPE OF HOLDING DETAIL screen appears.

```
                 Online Catalogue TYPE OF HOLDING DETAIL
Local Control #:  10009216                             Format  : SE
Title     : American environment : a publication of the American Society
Author    : American Society for Environmental Education
Publisher : American Society for Environmental Education, 1987
ISBN/ISSN : 0894-1394

 1. Description       : Indexes            3. Publication Type: 1  - IND
 2. Supplement/Index Type:

 Enumeration        Level 1     Level 2    Level 3    Level 4   Level 5   Level 6
  Caption      :
  Alternate Caption:

 Chronology         Level 1     Level 2    Level 3    Level 4
  Caption      :
  Alternate Caption:
 Frequency :
 Notes     :

Options:
  # line   Line by line   File   Quit holdings   ? Help   Exit
```

7. Edit the numbered fields. Name the Type of Holding record (in the *Description* field) so that it is easily identifiable. (In this example it is called Indexes.) *File*. The TYPE OF HOLDING SUMMARY screen appears.

```
                   Online Catalogue TYPE OF HOLDING SUMMARY
Local Control #:  10009216                               Format  : SE
Title      : American environment : a publication of the American Society
Author     : American Society for Environmental Education
Publisher  : American Society for Environmental Education, 1987
ISBN/ISSN  : 0894-1394
Last update: 05 NOV 1993 System

     Description                      Type  Supplement/Index type
     ------------                     ----  --------------------
  1** Issues                          ISS
     Captions/Labels: v.:iss.:(Year):(Mo.)
  2.  Indexes                         IND




2 item(s) in list
Options:  2
  Retrieve #   # item   Add item   Limit list   Quit holdings   ? Help
  Exit
```

8. Select the *Retrieve #* option and enter the line number of the TYPE
    OF HOLDING record that you want to move the parts to. The option
    line is replaced by the prompt:

    ```
    Insert parts at the beginning of the new TOH's parts list
    (Y/N)?
    ```

    NOTE: The double asterisk (**) denotes the Type of Holding record
    that the parts are currently linked to.

```
                  Online Catalogue TYPE OF HOLDING SUMMARY
Local Control #:  10009216                              Format  : SE
Title     : American environment : a publication of the American Society
Author    : American Society for Environmental Education
Publisher : American Society for Environmental Education, 1987
ISBN/ISSN : 0894-1394
Last update: 05 NOV 1993 System

     Description                   Type  Supplement/Index type
     -----------                   ----  --------------------
  1** Issues                       ISS
     Captions/Labels: v.:iss.:(Year):(Mo.)
  2.  Indexes                      IND




2 item(s) in list


Insert parts at the beginning of the new TOH's parts list (Y/N)? y
```

9. Enter Y or N. The PARTS SUMMARY screen appears. The parts have been removed from the Issues TYPE OF HOLDING record and have moved to the Indexes TYPE OF HOLDING record.

```
                     Online Catalogue PARTS SUMMARY
Local Control #:  10009216                              Format  : SE
Title       : American environment : a publication of the American Society
Author      : American Society for Environmental Education
Publisher   : American Society for Environmental Education, 1987
ISBN/ISSN   : 0894-1394
Last update: 05 NOV 1993 System


     Part Number           Type of Holding
     -----------           ---------------
  1.  v.98:iss.3(1998:JUL)  Issues - ISS
  2.  v.98:iss.2(1998:APR)  Issues - ISS
  3.  v.98:iss.1(1998:JAN)  Issues - ISS
  4.  v.97:iss.4(1997:OCT)  Issues - ISS
  5.  v.97:iss.3(1997:JUL)  Issues - ISS
  6.  v.97:iss.2(1997:APR)  Issues - ISS
  7.  v.97:iss.1(1997:JAN)  Issues - ISS
  8.  v.96:iss.4(1996:OCT)  Issues - ISS
  9.  v.96:iss.3(1996:JUL)  Issues - ISS
35 item(s) in list
Options:
  Sequence parts   Move #(s)   # item   Insert at line #   Forward
  Limit list   Quit holdings   ? Help   Exit
```

10. Select *Exit*. The TYPE OF HOLDING DETAIL screen appears.

```
                    Online Catalogue TYPE OF HOLDING DETAIL
Local Control #:  10009216                              Format  : SE
Title     : American environment : a publication of the American Society
Author    : American Society for Environmental Education
Publisher : American Society for Environmental Education, 1987
ISBN/ISSN : 0894-1394

 1. Description        : Issues              3. Publication Type: 0  - ISS
 2. Supplement/Index Type:
                            ** ACTIVE **    - (1 of 1 Publication Patterns)
 Enumeration        Level 1     Level 2    Level 3    Level 4  Level 5  Level 6
  Caption      : v.            iss.
  Alternate Caption:


 Chronology        Level 1     Level 2    Level 3    Level 4
  Caption      : (Year)       (Mo.)
  Alternate Caption:
 Frequency : q  - Quarterly
 Notes     :

Options:
  # line   Line by line   Patterns   Parts   Delete   File   Quit holdings
  ? Help   Exit
```

11. Select *Exit*. The TYPE OF HOLDING SUMMARY screen appears.

```
                   Online Catalogue TYPE OF HOLDING SUMMARY
Local Control #:  10009216                             Format  : SE
Title      : American environment : a publication of the American Society
Author     : American Society for Environmental Education
Publisher  : American Society for Environmental Education, 1987
ISBN/ISSN  : 0894-1394
Last update: 05 NOV 1993 System


     Description                    Type  Supplement/Index type
     -----------                    ----  --------------------
  1.  Issues                        ISS
     Captions/Labels: v.:iss.:(Year):(Mo.)
  2.  Indexes                       IND
     Captions/Labels: v.:iss.:(Year):(Mo.)




2 item(s) in list
Options:  2
  # item   Add item   Delete item(s)   Sequence TOHs   Move #(s)   Go to
  Limit list   Quit holdings   ? Help   Exit
```

12. If you want to see the parts that were moved or make changes to the
    publication pattern (captions, frequency) for the parts on the new
    Indexes Type of Holding, choose *# item*. In this case, choose 2. The
    TYPE OF HOLDING DETAIL screen appears.

```
                   Online Catalogue TYPE OF HOLDING DETAIL
Local Control #:  10009216                              Format  : SE
Title      : American environment : a publication of the American Society
Author     : American Society for Environmental Education
Publisher  : American Society for Environmental Education, 1987
ISBN/ISSN  : 0894-1394

 1. Description         : Indexes              3. Publication Type: 1  - IND
 2. Supplement/Index Type:

                            ** ACTIVE **   - (1 of 1 Publication Patterns)
 Enumeration        Level 1     Level 2   Level 3   Level 4  Level 5  Level 6
  Caption        : v.          iss.
  Alternate Caption:

 Chronology         Level 1     Level 2   Level 3   Level 4
  Caption        : (Year)      (Mo.)
  Alternate Caption:
 Frequency : q  - Quarterly
 Notes     :

Options:
  # line   Line by line   Patterns   Parts   Delete   File   Quit holdings
  ? Help   Exit
```

13. Select *Parts*. The PARTS SUMMARY screen appears showing you all of the parts that are now linked to this type of holding. You may notice that the system has created an extra part on your list. This extra part that the system has created is the next expected part and is only created when the parts that you have moved are attached to an active copy set. In other words, the system automatically updates your copy set records to expect material from the new type of holding. You may need to update information within this next expected part record. Do this by choosing the appropriate item from the PARTS SUMMARY list and editing the PARTS DETAIL record. In our example, the system did not create a next expected part since the copy sets for our title are inactive.

```
                     Online Catalogue PARTS SUMMARY
Local Control #:  10009216                           Format  : SE
Title      : American environment : a publication of the American Society
Author     : American Society for Environmental Education
Publisher  : American Society for Environmental Education, 1987
ISBN/ISSN  : 0894-1394
Last update: 05 NOV 1993 System


     Part Number          Type of Holding
     -----------          ---------------
  1.  1997                Indexes - IND
  2.  1996                Indexes - IND
  3.  1995                Indexes - IND
  4.  1994                Indexes - IND
  5.  1993                Indexes - IND
  6.  1992                Indexes - IND
  7.  1991                Indexes - IND
  8.  1990                Indexes - IND

8 item(s) in list
Options:
  Sequence parts   Move #(s)   # item   Insert at line #   Limit list
  Quit holdings   ? Help   Exit
```

14. Select *Exit*. The TYPE OF HOLDINGS DETAIL screen appears.

```
                 Online Catalogue TYPE OF HOLDING DETAIL
Local Control #:  10009216                              Format  : SE
Title     : American environment : a publication of the American Society
Author    : American Society for Environmental Education
Publisher : American Society for Environmental Education, 1987
ISBN/ISSN  : 0894-1394

 1. Description         : Indexes              3. Publication Type: 1  - IND
 2. Supplement/Index Type:

                           ** ACTIVE **   - (1 of 1 Publication Patterns)
 Enumeration       Level 1    Level 2   Level 3   Level 4  Level 5  Level 6
  Caption      : v.          iss.
  Alternate Caption:

 Chronology        Level 1    Level 2   Level 3   Level 4
  Caption      : (Year)      (Mo.)
  Alternate Caption:
 Frequency : q  - Quarterly
 Notes     :

Options:
  # line   Line by line   Patterns   Parts   Delete   File   Quit holdings
  ? Help   Exit
```

15. Select *Patterns*. The PUBLICATION PATTERN SUMMARY screen
    appears showing you the list of publication patterns that the Indexes
    Type of Holding is using.

```
                 Online Catalogue PUBLICATION PATTERN SUMMARY
Local Control #:  10009216                              Format  : SE
Title      : American environment : a publication of the American Society
Author     : American Society for Environmental Education
Publisher  : American Society for Environmental Education, 1987
ISBN/ISSN  : 0894-1394
Last update: 05 NOV 1993 System


      Enumeration/Chronology    Frequency     Description
      ---------------------    ---------    -----------
  1.  v.:iss.:(Year):(Mo.)     Quarterly    Indexes







1 item(s) in list
Options:  1
   # item   Add item   Limit list   Quit holdings   ? Help   Exit
```

16. Select *# item* to update the Publication Pattern to reflect the enumer-
ation, chronology and frequency of our Indexes. The PUBLICATION
PATTERN DETAIL screen appears.

```
                  Online Catalogue PUBLICATION PATTERN DETAIL
Local Control #:  10009216                      (1 of 1 Publication Patterns)
Title     : American environment : a publication of the American Society
Author    : American Society for Environmental Education
Publisher : American Society for Environmental Education, 1987
Publication Type: IND - Indexes                                  ** ACTIVE **
 1. Enumeration       Level 1     Level 2     Level 3   Level 4  Level 5 Level 6
    Caption/Label  : v.          iss.
    Number of Parts :            4
    Numbering Code  :            R
 2. Chronology        Level 1     Level 2    Level 3    Level 4
    Caption/Label  : (Year)      (Mo.)
    Code           : Y           M
 3. Copy Caption    :
 4. Ind/Supp Caption:                             Associated Level:
 5. Frequency Code  : q -Quarterly               6. Auto Prediction : Y
 7. Regularity Pattern: M - Monthly
    JA  FE  MR  AP  MA  JN  JL  AU  SE  OC  NO  DE
    1   0   0   1   0   0   1   0   0   1   0   0
    First Issue: 1 Days btn Issues:    Base Level: 2  Calendar Change:
 8. Date Range      :
Options:
  # line   Line by line   Second screen   Predictions   MARC   Delete   File
  Quit holdings   ? Help   Exit
```

17. Edit the PUBLICATION PATTERN DETAIL screen to reflect that the
    Indexes arrive annually and contain only a year for chronology. *File*.
    The system prompts:

    ```
    Do you want to retain the old record ? (Y/N) N.
    ```

```
                 Online Catalogue PUBLICATION PATTERN DETAIL
Local Control #:  10009216                    (1 of 1 Publication Patterns)
Title      : American environment : a publication of the American Society
Author     : American Society for Environmental Education
Publisher  : American Society for Environmental Education, 1987
Publication Type: IND - Indexes                                 ** ACTIVE **
 1. Enumeration      Level 1     Level 2     Level 3   Level 4  Level 5 Level 6
    Caption/Label  :
    Number of Parts :
    Numbering Code  :
 2. Chronology       Level 1     Level 2     Level 3   Level 4
    Caption/Label  : (Year)
    Code           : Y
 3. Copy Caption    :
 4. Ind/Supp Caption:                              Associated Level:
 5. Frequency Code  : a -Annual                6. Auto Prediction : Y
 7. Regularity Pattern: M - Monthly
    JA  FE  MR  AP  MA  JN  JL  AU  SE  OC  NO  DE
     0   0   0   0   0   0   0   0   0   0   0   1
    First Issue:  1 Days btn Issues:  0 Base Level: 0  Calendar Change:
 8. Date Range      :

      Do you want to retain the old record ? (Y/N)
```

18. Answer N. The PUBLICATION PATTERN SUMMARY screen appears.

```
               Online Catalogue PUBLICATION PATTERN SUMMARY
Local Control #:  10009216                          Format  : SE
Title      : American environment : a publication of the American Society
Author     : American Society for Environmental Education
Publisher  : American Society for Environmental Education, 1987
ISBN/ISSN  : 0894-1394
Last update: 05 NOV 1993 System


     Enumeration/Chronology    Frequency     Description
     ----------------------    ---------     -----------
  1.  (Year)                   Annual        Indexes




1 item(s) in list
Options:
  # item   Add item   Limit list   Quit holdings   ? Help   Exit
```

19. Select *Exit*. The TYPE OF HOLDING DETAIL screen appears.

```
                   Online Catalogue TYPE OF HOLDING DETAIL
Local Control #:  10009216                              Format  : SE
Title     : American environment : a publication of the American Society
Author    : American Society for Environmental Education
Publisher : American Society for Environmental Education, 1987
ISBN/ISSN  : 0894-1394

 1. Description        : Indexes            3. Publication Type: 1  - IND
 2. Supplement/Index Type:
                           ** ACTIVE **   - (1 of 1 Publication Patterns)
 Enumeration       Level 1     Level 2    Level 3   Level 4  Level 5  Level 6
  Caption        :
  Alternate Caption:

 Chronology        Level 1     Level 2    Level 3   Level 4
  Caption        : (Year)
  Alternate Caption:
 Frequency : a  - Annual
 Notes    :

Options:    Display parts
  # line   Line by line   Patterns   Parts   Delete   File   Quit holdings
  ? Help   Exit
```

20. Select *Exit*. The TYPE OF HOLDING SUMMARY screen appears.

```
                   Online Catalogue TYPE OF HOLDING SUMMARY
Local Control #:  10009216                              Format  : SE
Title      : American environment : a publication of the American Society
Author     : American Society for Environmental Education
Publisher  : American Society for Environmental Education, 1987
ISBN/ISSN  : 0894-1394
Last update: 05 NOV 1993 System


     Description                      Type  Supplement/Index type
     -----------                      ----  --------------------
  1.  Issues                          ISS
     Captions/Labels: v.:iss.:(Year):(Mo.)
  2.  Indexes                         IND
     Captions/Labels: (Year)




2 item(s) in list
Options:
  # item   Add item   Delete item(s)   Sequence TOHs   Move #(s)   Go to
  Limit list   Quit holdings   ? Help   Exit
```

21. To see how the holdings display in the OPAC, select the *Go to* option. The system repaints the option line.

```
                 Online Catalogue TYPE OF HOLDING SUMMARY
Local Control #:  10009216                             Format  : SE
Title      : American environment : a publication of the American Society
Author     : American Society for Environmental Education
Publisher  : American Society for Environmental Education, 1987
ISBN/ISSN  : 0894-1394
Last update: 05 NOV 1993 System


     Description                    Type  Supplement/Index type
     ------------                   ----  ---------------------
 1.  Issues                         ISS
     Captions/Labels: v.:iss.:(Year):(Mo.)
 2.  Indexes                        IND
     Captions/Labels: (Year)




2 item(s) in list
Options:
  OPAC display   Pieces display   Type of holdings display   Parts display
```

22. Choose *OPAC display.* The system responds by displaying the hold-
    ings. Notice that the holdings for Issues and Indexes are now sepa-
    rated.

```
                        Online Catalogue - BRIEF DISPLAY       (1 of 1 titles)
Local Control # :10009216
Author         : American Society for Environmental Education
Title          : American environment : a publication of the American Society
                 for Environmental Education
Pub. Date      : c1987.
LCCN           : sf 93094930
Language       : English

 LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
  1.  ADVLIB Central GENERAL c.1
      Issues: v.90:iss.1(1990:JAN)-v.92:iss.4(1992:OCT),
              v.93:iss.3(1993:JUL)-v.95:iss.4(1995:OCT),
              v.96:iss.2(1996:APR),v.96:iss.4(1996:OCT),
              v.97:iss.2(1997:APR),v.98:iss.1(1998:JAN)-
              v.98:iss.3(1998:JUL)
              Last rec'd: v.98:iss.3(1998:JUL) on AUG 6, 1998
      Indexes: 1990 1991 1992 1993 1994 1995 1996 1997
               Last rec'd: 1997 on NOV 2, 1998
2 item(s) in list.
Options:
  Full display   Forward   # item   Exit
```

Moving the Type of Holding Record to a Different Bibliographic Record

Purpose

Move Type of Holding (and its associated pieces/parts) to a different bibliographic record. In the following example, the library has checked in Issues and Indexes on the title *American Environment* since 1990. The title of this publication changed to *North American Environment* in 1996 and the library wants to move all of its holdings since 1995 to the new title. As a first step, follow the instructions for Moving Parts to a Different Type of Holding (covered in the previous section) and move any parts after 1995 to new Type of Holding records. For the purpose of this example, the descriptions given to these new Type of Holding records are: Issues after 1996 and Indexes after 1996.

Task Summary

1. Obtain the TYPE OF HOLDING SUMMARY screen.

2. Select the *Move #(s)* option and enter the line numbers of the Type of Holding records you are moving.

3. Answer Y when the system prompts for confirmation.

4. Enter a search string.

5. Select the *Retrieve* option.

6. The Type of Holdings and their associated parts no longer display on the source bibliographic record.

7. To see how the holdings display in the online catalogue, select the *Go to* option. The option line changes.

8. Select the *OPAC display* option.

Procedure

1. From Holdings edit obtain the TYPE OF HOLDING screen.

```
                    Online Catalogue TYPE OF HOLDING SUMMARY
Local Control #:  10009216                              Format  : SE
Title      : American environment : a publication of the American Society
Author     : American Society for Environmental Education
Publisher  : American Society for Environmental Education, 1987
ISBN/ISSN  : 0894-1394
Last update: 05 NOV 1993 System


     Description                      Type  Supplement/Index type
     -----------                      ----  --------------------
  1. Issues                           ISS
     Captions/Labels: v.:iss.:(Year):(Mo.)
  2. Indexes                          IND
     Captions/Labels: (Year)
  3. Issues after 1996                ISS
     Captions/Labels: (Year)
  4. Indexes after 1996               IND
     Captions/Labels: (Year)


4 item(s) in list
Options:  3-4
  # item   Add item   Delete item(s)   Sequence TOHs   Move #(s)   Go to
  Limit list   Quit holdings   ? Help   Exit
```

2. Select *Move #(s)* and enter 3–4. The system prompts:

   ```
   2 of 2 can be moved. Move them (Y/N)?
   ```

```
                 Online Catalogue TYPE OF HOLDING SUMMARY
Local Control #:  10009216                              Format  : SE
Title      : American environment : a publication of the American Society
Author     : American Society for Environmental Education
Publisher  : American Society for Environmental Education, 1987
ISBN/ISSN  : 0894-1394
Last update: 05 NOV 1993 System


      Description                    Type  Supplement/Index type
      -----------                    ----  --------------------
  1.  Issues                         ISS
      Captions/Labels: v.:iss.:(Year):(Mo.)
  2.  Indexes                        IND
      Captions/Labels: (Year)
  3.  Issues after 1996              ISS
      Captions/Labels: (Year)
  4.  Indexes after 1996             IND
      Captions/Labels: (Year)

4 item(s) in list


2 of 2 can be moved. Move them (Y/N)? Y
```

3. Enter Y. The system then prompts for a search string

```
Enter new LCN or search string :
```

```
                  Online Catalogue TYPE OF HOLDING SUMMARY
Local Control #:  10009216                              Format  : SE
Title      : American environment : a publication of the American Society
Author     : American Society for Environmental Education
Publisher  : American Society for Environmental Education, 1987
ISBN/ISSN  : 0894-1394
Last update: 05 NOV 1993 System


     Description                    Type  Supplement/Index type
     -----------                    ----  --------------------
  1.  Issues                        ISS
     Captions/Labels: v.:iss.:(Year):(Mo.)
  2.  Indexes                       IND
     Captions/Labels: (Year)
  3.  Issues after 1996             ISS
     Captions/Labels: (Year)
  4.  Indexes after 1996            IND
     Captions/Labels: (Year)

4 item(s) in list


Enter new LCN or search string :  t=north american environment
```

4. Enter the Local Control Number or the search string of the biblio-
    graphic record that you want to transfer the type of holdings to. In
    this case, `t=north american environment`. The system
    responds by displaying the search screen for the title North Amer-
    ican Environment.

```
                        Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10008975
Author         : American Society for Environmental Education
Title          : North American environment : the magazine of the American
                 Society for Environmental Education
Pub. Date      : c1996-
LCCN           : cn 89039047
Language       : English




0 item(s) in list.
Options:
  # item   Retrieve   Prior screen   Extend search   Full display
  Limit list   Output   MARC   Order display   Review search   OPAC parms
  New search   Reset   Card print   ? Help
```

5. Select *Retrieve* to move the Type of Holding records to the target.

```
                        Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10008975
Author         : American Society for Environmental Education
Title          : North American environment : the magazine of the American
                 Society for Environmental Education
Pub. Date      : c1996-
LCCN           : cn 89039047
Language       : English




2 holdings moved from 10009216 to 10008975
Press <ENTER>
```

6. The option line is replaced by the message indicating that the hold-
ings have been moved. The TYPE OF HOLDING SUMMARY screen
appears and the moved Type of Holding records are no longer asso-
ciated with this title.

```
                  Online Catalogue TYPE OF HOLDING SUMMARY
Local Control #:  10009216                              Format  : SE
Title     : American environment : a publication of the American Society
Author    : American Society for Environmental Education
Publisher : American Society for Environmental Education, 1987
ISBN/ISSN  : 0894-1394
Last update: 05 NOV 1993 System

     Description                    Type  Supplement/Index type
     -----------                    ----  ---------------------
  1.  Issues                        ISS
      Captions/Labels: v.:iss.:(Year):(Mo.)
  2.  Indexes                       IND
      Captions/Labels: (Year)


2 item(s) in list
Options:
  # item   Add item   Delete item(s)   Sequence TOHs   Move #(s)   Go to
  Limit list   Quit holdings   ? Help   Exit
```

7. To see how the holdings display in the online catalogue, select the *Go to* option. The option line changes.

```
                  Online Catalogue TYPE OF HOLDING SUMMARY
Local Control #:  10009216                              Format  : SE
Title     : American environment : a publication of the American Society
Author    : American Society for Environmental Education
Publisher : American Society for Environmental Education, 1987
ISBN/ISSN  : 0894-1394
Last update: 05 NOV 1993 System

     Description                    Type  Supplement/Index type
     -----------                    ----  ---------------------
  1.  Issues                        ISS
      Captions/Labels: v.:iss.:(Year):(Mo.)
  2.  Indexes                       IND
      Captions/Labels: (Year)

2 item(s) in list
Options:
 OPAC display   Pieces display   Type of holdings display   Parts display
 Pub. pattern display   Locations display   Serial copy display
 Check-in serials   Bibliographic edit   Order display   Exit
```

8. Select the *OPAC display* option.

```
                          Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10009216
Author        : American Society for Environmental Education
Title         : American environment : a publication of the American Society
                for Environmental Education
Pub. Date     : c1987.
LCCN          : sf 93094930
Language      : English

 LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
  1.  ADVLIB Central GENERAL c.1
      Issues: v.90:iss.1(1990:JAN)-v.92:iss.4(1992:OCT),
              v.93:iss.3(1993:JUL)-v.95:iss.4(1995:OCT)
              Last rec'd: v.95:iss.4(1995:OCT) on AUG 6, 1998
      Indexes: 1990 1991 1992 1993 1994 1995
               Last rec'd: 1995 on AUG 7, 1998
  2.  ADVLIB Central GENERAL c.2
      Issues: v.90:iss.1(1990:JAN)-v.92:iss.4(1992:OCT),
              v.93:iss.3(1993:JUL)-v.95:iss.4(1995:OCT)
2 item(s) in list.
Options:
  Full display   Forward   # item   Exit
```

In the Online Catalogue display, the original title American environment now has holdings from 1990 through 1995 only. Search for the title *North American Environment*.

```
                      Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10008975
Author         : American Society for Environmental Education
Title          : North American environment : the magazine of the American
                 Society for Environmental Education
Pub. Date      : c1996-
LCCN           : cn 89039047
Language       : English

 LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
  1.  ADVLIB Central GENERAL c.1
      Issues after 1996: v.96:iss.2(1996:APR),v.96:iss.4(1996:OCT),
                         v.97:iss.2(1997:APR),v.98:iss.1(1998:JAN)-
                         v.98:iss.3(1998:JUL)
                         Last rec'd: v.98:iss.3(1998:JUL) on AUG 6, 1998
      Indexes after 1996: 1996 1997
                          Last rec'd: 1997 on AUG 7, 1998
  2.  ADVLIB Central GENERAL c.2
      Issues after 1996: v.96:iss.2(1996:APR),v.96:iss.4(1996:OCT),
2 item(s) in list.
Options:
  # item   Forward   Prior screen   Holdings edit   Full display
  Extend search   Limit list   Output   MARC   Order display   Review search
  OPAC parms   New search   Reset   Card print   ? Help
```

The new title *North American Environment* has holdings from 1996 onward.

Moving Location Holdings to Another Bibliographic Record

Purpose   Move a location and all its holdings to another bibliographic record.

ADVANCE allows you to move selected holdings from one bibliographic record to another in a single procedure from the LOCATION COPY SUMMARY screen. The selected location copy and its pieces are copied to the target record. A copy of the parts, type of holding, and publication patterns is filed with the target record. If all the location copies are not moved to the target, the original type of holding, parts and publication patterns remain on the source as they are still required. However, if **all** the location copies are moved, the system deletes the original type of holding, parts and location copy from the source record (because it has no holdings now).

Task Summary

1. Search screen for the source record (that is, the record whose holdings you want to move) and select the *Holdings edit* option.

2. Select the *Locations display* option.

3. Select the *Move #* option and enter the line numbers to move. The system performs status and permissions checks.

4. The system displays the number of items that can be moved.

5. The system prompts for a search string. Enter your search.

6. Retrieve the target record.

7. The source LOCATION COPY SUMMARY screen displays. The moved location copies do not appear.

Procedure

```
                         Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10000505
LCCN            :map68000873 //r82
AUTHOR          :Encyclopaedia Britannica
TITLE           :Britannica world atlas international
Pub/Size        :41 cm.

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.  ADVLIB Central GENERAL
     Multi-volume Set: 1996




1 item(s) in list.
Options:
 # item   Prior screen   Holdings edit   Extend search   Full display
 Limit list   Output   MARC   Order display   Review search   OPAC parms
 New search   Reset   ? Help
```

1. From the OPAC display select *Holdings edit*. The option line changes.

```
                         Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10000505
LCCN            :map68000873 //r82
AUTHOR          :Encyclopaedia Britannica
TITLE           :Britannica world atlas international
Pub/Size        :41 cm.

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.  ADVLIB Central GENERAL
     Multi-volume Set: 1996




1 item(s) in list.
Options:
 OPAC display   Pieces display   Type of holdings display   Parts display
 Pub. pattern display   Locations display   Serial copy display
 Check-in serials   Bibliographic edit   Order display   Exit
```

2. Select *Locations display.* The `LOCATION COPY SUMMARY` screen appears.

```
              LOCATION COPY SUMMARY                        MASTER

LCN     :10000505   Call #: G1019.E58 1968           ISSN:
Title   :Britannica world atlas international
Imprint :Chicago [1968]                              LCCN: map68000873 /

     Physical Location    Collection/Call number/Copy     Format
     ------------------   --------------------------      ------
 1.  ADVLIB Central       GENERAL                         not defined




1 item(s) in list.
Options:1
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

3. Select the *Move # (s)* option and enter the line number of the location of the parts that you want to move. If the last piece for this location will be moved as a result of this operation the system displays a warning message.

```
              LOCATION Move Error/Warning Report


     Error/Warning message
     ---------------------------------------------------------------
     Warning - moving *LAST* piece from : AL CENTRAL




Options:
 ? Help   Exit
```

4. Select *Exit*. The system prompts: `1 of 1 can be moved. Move it (Y/N)?`

```
                   LOCATION Move Error/Warning Report


       Error/Warning message
       ----------------------------------------------------------------
       Warning - moving *LAST* piece from : AL CENTRAL




 1 of 1 can be moved. Move it (Y/N)?
```

5. Enter `Y`.

6. ADVANCE prompts you for a `LCN` or search string.

```
                   LOCATION Move Error/Warning Report


       Error/Warning message
       ----------------------------------------------------------------
       Warning - moving *LAST* piece from : AL CENTRAL




  Enter new LCN or search string :  LCN=10000522
```

```
                    Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10000522
LCCN            :68010064
TITLE           :Encyclopædia Britannica
Pub/Size        :Encyclopædia Britannica 29 cm.

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.   ADVLIB Central GENERAL AE5 .E363 1968 c.1 /Regular print
      Multipart Set: Vol.A-Vol.C
 2.   ADVLIB Central MRR AE5 .E363 1968  /Regular print
 3.   ADVLIB Landover SER&DOCS AE5 .E363 1968  /Regular print
      Multipart Set: Vol.A-Vol.E




1 holdings moved from 10000505 to 10000522
Press <ENTER>
```

7. The system moves the holdings from the source location copy record to the target record. If you display the LOCATION COPY SUMMARY screen for the source record, you see that all the location copies have been moved.

```
              LOCATION COPY SUMMARY                        MASTER

LCN     :10000505   Call #: G1019.E58 1968           ISSN:
Title   :Britannica world atlas international
Imprint :Chicago [1968]                              LCCN: map68000873 /

     Physical Location    Collection/Call number/Copy    Format
     -----------------    --------------------------    ------


0 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

Moving Pieces/Parts to Another Location

Purpose

Move pieces/parts to another location.

This procedure demonstrates how to move selected pieces to a target location copy record.

In this example, Vol. A-E will be moved from ADVLIB Central MRR to ADVLIB Landover SER&DOCS.

Task Summary

1. Search screen for the source record (that is, the record whose holdings you want to move) and select the *Holdings edit* option.

2. Select the Locations display option. The LOCATION COPY SUMMARY record appears.

3. Use the *item #* option to select the location of the pieces/parts that you want to move.

4. Select the *Pieces/Parts* option.

5. Use the *Move #(s)* option and the line numbers of the parts you want to move.

6. The system prompts you for the type of move. Enter L (Location).

7. The system prompts for confirmation. Enter Y.

8. Use the *Retrieve #* option to retrieve the target location record. The system prompts to determine if owning and current location should be the same.

9. Answer Y or N. The LOCATION COPY SUMMARY screen displays.

Procedure

```
                      Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10000522
LCCN           :68010064
TITLE          :Encyclopædia Britannica
Pub/Size       :Encyclopædia Britannica 29 cm.

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.  ADVLIB Central GENERAL AE5 .E363 1968 c.1 /Regular print
     Multipart Set: Vol.A-Vol.C
 2.  ADVLIB Central MRR AE5 .E363 1968 c.2 /Regular print
     Multipart Set: Vol.A-Vol.E
 3.  ADVLIB Landover SER&DOCS AE5 .E363 1968  /Regular print




3 item(s) in list.
Options:
 # item   Prior screen   Holdings edit   Extend search   Full display
 Limit list   Output   MARC   Order display   Review search   OPAC parms
 New search   Reset   ? Help
```

1. From the OPAC display select *Holdings edit*. The option line changes.

```
                     Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10000522
LCCN          :68010064
TITLE         :Encyclopædia Britannica
Pub/Size      :Encyclopædia Britannica 29 cm.

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.  ADVLIB Central GENERAL AE5 .E363 1968 c.1 /Regular print
     Multipart Set: Vol.A-Vol.C
 2.  ADVLIB Central MRR AE5 .E363 1968 c.2 /Regular print
     Multipart Set: Vol.A-Vol.E
 3.  ADVLIB Landover SER&DOCS AE5 .E363 1968  /Regular print




3 item(s) in list.
Options:
 OPAC display   Pieces display   Type of holdings display   Parts display
 Pub. pattern display   Locations display   Serial copy display
 Check-in serials   Bibliographic edit   Order display   Exit
```

2. Select *Locations display.* The LOCATION COPY SUMMARY screen appears.

```
            LOCATION COPY SUMMARY                          MASTER

LCN     :10000522   Call #: AE5.E363 1968          ISSN:
Title   :Encyclopædia Britannica
Imprint :Chicago, Encyclopædia Britannica [1968]    LCCN: 68010064

     Physical Location    Collection/Call number/Copy    Format
     -----------------    --------------------------     ------
 1.  ADVLIB Central       GENERAL AE5 .E363 1968 c.1     Regular print
 2.  ADVLIB Central       MRR AE5 .E363 1968             Regular print
 3.  ADVLIB Landover      SER&DOCS AE5 .E363 1968        Regular print




3 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

3. Select the *# item* option and enter the line number of the location of the parts that you want to move. The LOCATION COPY DETAIL screen appears.

```
              LOCATION COPY DETAIL                          MASTER

LCN     :10000522  Call #: AE5.E363 1968               ISSN:
Title   :Encyclopædia Britannica
Imprint :Chicago, Encyclopædia Britannica [1968]       LCCN: 68010064


 LOCCPY key :  10031560
 1. Institution     : AL=ADVANCE Libra  9. Coded Location    :
 2. Sublocation     : CENTRAL=Central  10. Non-coded Location :
 3. Collection code : MRR=Main Reading 11. Classification src.:
 4. Call # prefix   :                  12. Shelving Title    :
 5. Call number     : AE5 .E363 1968   13. Copyright fee code :
 6. Call # suffix   :                  14. Materials specified:
 7. Copy number     : 2                15. Placeholder only   : N
 8. Retention policy: 0                16. Physical format    : ta


Options:
 # line   Line by line   Pieces / Parts   Holdings statement
 MARC Holdings   Binding information   File   Delete   Quit holdings
 ? Help   Exit
```

4. Select *Pieces/Parts*. The PIECES/PARTS SUMMARY screen appears.

```
              Online Catalogue PIECES / PARTS SUMMARY

LCN     :10000522   Call #: AE5.E363 1968               ISSN:
Title   :Encyclopædia Britannica
Imprint :Chicago, Encyclopædia Britannica [1968]       LCCN: 68010064

     Part number/Bound label     Status            Barcoded
     ----------------------      ------            --------
 1.  Vol.A-Vol.E                 Available         Y




1 item(s) in list
Options:
 # item   Delete item(s)   Move #(s)   Limit list   Quit holdings   ? Help
 Exit
```

5. Select *Move #(s)* and enter the line number(s) of the parts you want to move to the new location.

```
              Online Catalogue PIECES / PARTS SUMMARY

LCN     :10000522   Call #: AE5.E363 1968              ISSN:
Title   :Encyclopædia Britannica
Imprint :Chicago, Encyclopædia Britannica [1968]       LCCN: 68010064

     Part number/Bound label      Status            Barcoded
     ----------------------       ------            --------
 1.  Vol.A-Vol.E                  Available          Y




1 item(s) in list

Move to new Bibliographic record (B) or to new Location (L)?    L
Select 'B' to move holdings to another bibliographic record
Select 'L' to move holdings to another location on this bib
```

6. The system prompts you for the type of move: to a bibliographic record, or to a location. Select L.

```
            PIECES/PARTS Location Move Error/Warning Report


     Error/Warning message
     -----------------------------------------------------------------
     Warning - moving *LAST* piece from : AL






1 of 1 can be moved. Move it (Y/N)? Y
```

7. ADVANCE tells you how many items can be moved and asks you to confirm. (A warning message appears if you are moving the last

piece from a location.) Enter Y. The LOCATION COPY SUMMARY
screen appears.

NOTE: The double asterisk (**) indicates the location currently
linked to the pieces/parts.

```
              LOCATION COPY SUMMARY                        MASTER

LCN     :10000522  Call #: AE5.E363 1968            ISSN:
Title   :Encyclopædia Britannica
Imprint :Chicago, Encyclopædia Britannica [1968]    LCCN: 68010064

     Physical Location    Collection/Call number/Copy    Format
     -----------------    --------------------------     ------
 1.  ADVLIB Central       GENERAL AE5 .E363 1968 c.1     Regular print
 2** ADVLIB Central       MRR AE5 .E363 1968 c.2         Regular print
 3.  ADVLIB Landover      SER&DOCS AE5 .E363 1968        Regular print



3 item(s) in list.
Options:
 Retrieve #   # item   Add item   Limit list   Quit holdings   ? Help
 Exit
```

8. Select *Retrieve #* and enter the line number of the location where you
   want to move the pieces/parts. When you <Enter> ADVANCE moves
   the pieces to the new location. The system prompts:

   ```
   Update owning info from current info for attached PIECES
   (Y/N) ? :
   ```

   If you answer Yes, the owning and current information for the
   piece(s) will be the same.

   If all the parts from a location are moved the system deletes the
   source location copy record and displays the LOCATION COPY
   SUMMARY. If parts remain at a location, then the PIECES/PARTS
   SUMMARY screen of the source location copy record redisplays. In
   this example, all the pieces/parts were moved.

```
                    LOCATION COPY SUMMARY                        MASTER

LCN      :10000522   Call #: AE5.E363 1968            ISSN:
Title    :Encyclopædia Britannica
Imprint  :Chicago, Encyclopædia Britannica [1968]     LCCN: 68010064

      Physical Location    Collection/Call number/Copy     Format
      -----------------    --------------------------      ------
 1.   ADVLIB Central       GENERAL AE5 .E363 1968 c.1      Regular print
 2.   ADVLIB Landover      SER&DOCS AE5 .E363 1968         Regular print



2 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

In the Online Catalogue display, the moved pieces/parts are now located at ADVLIB Landover SER&DOCS. The ADVLIB Central MRR location is no longer present. It has no holdings and has been deleted by the system.

```
                     Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10000522
LCCN          :68010064
TITLE         :Encyclopædia Britannica
Pub/Size      :Encyclopædia Britannica 29 cm.

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.  ADVLIB Central GENERAL AE5 .E363 1968 c.1 /Regular print
     Multipart Set: Vol.A-Vol.C
 2.  ADVLIB Landover SER&DOCS AE5 .E363 1968  /Large print
     Multipart Set: Vol.A-Vol.E




2 item(s) in list.
Options:
 # item   Prior screen   Holdings edit   Extend search   Full display
 Limit list   Output   MARC   Order display   Review search   OPAC parms
 New search   Reset   ? Help
```

Moving Pieces/Parts to Another Bibliographic Record

Purpose

Move pieces/parts to another bibliographic record.

This procedure demonstrates how to move selected pieces to a target bibliographic record. When the move is complete, the Type of Holding, Parts, and Publication Pattern records are copied to the target bibliographic record and deleted from the source records.

In this example, a CD-ROM will be moved to a different bibliographic record.

Task Summary

1. Search screen for the source record (that is, the record whose holdings you want to move) and select the *Holdings edit* option.

2. Select the Locations display option. The LOCATION COPY SUMMARY record appears.

3. Use the *item #* option to select the location of the pieces/parts that you want to move.

4. Select the *Pieces/Parts* option.

5. Use the *Move #(s)* option and enter the line numbers of the parts you want to move.

6. The system prompts you for the type of move. Enter B (Bibliographic).

7. The system prompts for confirmation. Enter Y.

8. Enter a search string.

9. Use the *Retrieve* option to retrieve the target bibliographic record.

Procedure

```
                      Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10005009
LCCN            :90084190
AUTHOR          :Encyclopaedia Britannica, inc.
TITLE           :The New encyclopaedia Britannica
Pub/Size        :Encyclopaedia Britannica, 29 cm.

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.  ADVLIB Central GENERAL  /Regular print
     Multi-volume set: Pt.A-Pt.D
     Multipart CD-ROM: CD.1
     Multi-volume Set: V.A-C;V.D-G;V.H-K;V.L-O;V.P-S;V.T-Z



1 item(s) in list.
Options:
 # item   Prior screen   Holdings edit   Extend search   Full display
 Limit list   Output   MARC   Order display   Review search   OPAC parms
 New search   Reset   ? Help
```

1. From the OPAC display select *Holdings edit*. The option line changes.

```
                      Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10005009
LCCN            :90084190
AUTHOR          :Encyclopaedia Britannica, inc.
TITLE           :The New encyclopaedia Britannica
Pub/Size        :Encyclopaedia Britannica, 29 cm.

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.  ADVLIB Central GENERAL  /Regular print
     Multi-volume set: Pt.A-Pt.D
     Multipart CD-ROM: CD.1
     Multi-volume Set: V.A-C;V.D-G;V.H-K;V.L-O;V.P-S;V.T-Z



1 item(s) in list.
Options:
 OPAC display   Pieces display   Type of holdings display   Parts display
 Pub. pattern display   Locations display   Serial copy display
 Check-in serials   Bibliographic edit   Order display   Exit
```

2. Select *Locations display.* The LOCATION COPY SUMMARY screen
   appears.

```
            LOCATION COPY SUMMARY                          MASTER

LCN     :10005009   Call #: AE5.E363 1992           ISSN:
Title   :The New encyclopaedia Britannica
Imprint :Chicago : Encyclopaedia Britannica, c199+    LCCN: 90084190

     Physical Location    Collection/Call number/Copy    Format
     ------------------   --------------------------    ------
 1.  ADVLIB Central       GENERAL                       not defined
 2.  ADVLIB Central       GENERAL                       Regular print




2 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

3. Select the *# item* option and enter the line number of the location of
   the pieces/parts that you want to move. The LOCATION COPY DETAIL
   screen appears.

```
              LOCATION COPY DETAIL                         MASTER

 LCN      :10005009   Call #: AE5.E363 1992              ISSN:
 Title    :The New encyclopaedia Britannica
 Imprint  :Chicago : Encyclopaedia Britannica, c199+     LCCN: 90084190


 LOCCPY key :  10031816
  1. Institution     : AL=ADVANCE Libra  9. Coded Location    :
  2. Sublocation     : CENTRAL=Central  10. Non-coded Location :
  3. Collection code : GENERAL=General  11. Classification src.:
  4. Call # prefix   :                  12. Shelving Title    :
  5. Call number     :                  13. Copyright fee code :
  6. Call # suffix   :                  14. Materials specified:
  7. Copy number     :                  15. Placeholder only   : N
  8. Retention policy: 0                16. Physical format    : ta




 Options:
  # line   Line by line   Pieces / Parts   Holdings statement
  MARC Holdings   Binding information   File   Delete   Quit holdings
  ? Help   Exit
```

4. Select *Pieces/Parts*. The PIECES/PARTS SUMMARY screen appears.

```
                    Online Catalogue PIECES / PARTS SUMMARY

LCN      :10005009   Call #: AE5.E363 1992                ISSN:
Title    :The New encyclopaedia Britannica
Imprint  :Chicago : Encyclopaedia Britannica, c199+       LCCN: 90084190


      Part number/Bound label      Status              Barcoded
      ----------------------       ------              --------
 1.  Pt.A                          Received            N
 2.  Pt.B                          Received            N
 3.  Pt.C                          Received            N
 4.  Pt.D                          Received            N
 5.  CD.1                          Received            N
 6.  V.T-Z                         Received            N
 7.  V.P-S                         Received            N
 8.  V.L-O                         Received            N
 9.  V.H-K                         Received            N
10.  V.D-G                         Received            N

11 item(s) in list
Options: 5
 # item   Delete item(s)   Move #(s)   Forward   Limit list   Quit holdings
 ? Help   Exit
```

5. Select *Move #(s)* and enter the line number(s) of the parts you want to move to the new bibliographic record. In this example, the part on line 5 (CD.1) will be moved to the new bibliographic record.

```
               Online Catalogue PIECES / PARTS SUMMARY

 LCN     :10005009   Call #: AE5.E363 1992              ISSN:
 Title   :The New encyclopaedia Britannica
 Imprint :Chicago : Encyclopaedia Britannica, c199+      LCCN: 90084190

      Part number/Bound label        Status            Barcoded
      ----------------------         ------            --------
  1.  Pt.A                           Received          N
  2.  Pt.B                           Received          N
  3.  Pt.C                           Received          N
  4.  Pt.D                           Received          N
  5.  CD.1                           Received          N
  6.  V.T-Z                          Received          N
  7.  V.P-S                          Received          N
  8.  V.L-O                          Received          N
  9.  V.H-K                          Received          N
 10.  V.D-G                          Received          N

 11 item(s) in list


 Move to new Bibliographic record (B) or to new Location (L)?    B
 Select 'B' to move holdings to another bibliographic record
 Select 'L' to move holdings to another location on this bib
```

6. The system prompts you for the type of move: to a bibliographic record, or to a location. Select B .

```
                Online Catalogue PIECES / PARTS SUMMARY

 LCN     :10005009   Call #: AE5.E363 1992              ISSN:
 Title   :The New encyclopaedia Britannica
 Imprint :Chicago : Encyclopaedia Britannica, c199+     LCCN: 90084190

       Part number/Bound label      Status            Barcoded
       ----------------------       ------            --------
  1.  Pt.A                          Received          N
  2.  Pt.B                          Received          N
  3.  Pt.C                          Received          N
  4.  Pt.D                          Received          N
  5.  CD.1                          Received          N
  6.  V.T-Z                         Received          N
  7.  V.P-S                         Received          N
  8.  V.L-O                         Received          N
  9.  V.H-K                         Received          N
 10.  V.D-G                         Received          N

 Checking order status and permissions, please be patient


 1 of 1 can be moved. Move it (Y/N)?
```

7. ADVANCE tells you how many items can be moved and asks you to confirm. (A warning message appears if you are moving the last piece/part from a location.) Enter Y. The system prompts you for a LCN or search string.

```
                    Online Catalogue PIECES / PARTS SUMMARY

  LCN      :10005009   Call #: AE5.E363 1992               ISSN:
  Title    :The New encyclopaedia Britannica
  Imprint  :Chicago : Encyclopaedia Britannica, c199+      LCCN: 90084190

       Part number/Bound label      Status              Barcoded
       ----------------------       ------              --------
   1.  Pt.A                         Received            N
   2.  Pt.B                         Received            N
   3.  Pt.C                         Received            N
   4.  Pt.D                         Received            N
   5.  CD.1                         Received            N
   6.  V.T-Z                        Received            N
   7.  V.P-S                        Received            N
   8.  V.L-O                        Received            N
   9.  V.H-K                        Received            N
  10.  V.D-G                        Received            N

 Checking order status and permissions, please be patient

  Enter new LCN or search string : 10002476
```

8. Enter a LCN or search string. The bibliographic record appears.

```
                    Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
 Local Control # :10002476
 LCCN           :80070040 //r81
 TITLE          :Library guide to Encyclopaedia Britannica, 15th edition
 Pub/Size       :Encyclopaedia Britannica, 29 cm.

 HELD AT THE FOLLOWING LOCATIONS, CHOOSE ONE FOR MORE DETAIL




 0 item(s) in list.
 Options:
  # item   Retrieve   Prior screen   Extend search   Full display
  Limit list   Output   MARC   Order display   Review search   OPAC parms
  New search   Reset   ? Help
```

9. Select *Retrieve*. When you <Enter> ADVANCE moves the pieces/parts
    to the new bibliographic record.

```
                     Online Catalogue - BRIEF DISPLAY       (1 of 1 titles)
Local Control # :10002476
LCCN            :80070040 //r81
TITLE           :Library guide to Encyclopaedia Britannica, 15th edition
Pub/Size        :Encyclopaedia Britannica, 29 cm.

HELD AT THE FOLLOWING LOCATIONS, CHOOSE ONE FOR MORE DETAIL




1 holdings moved from 10005009 to 10002476
Press <ENTER>
```

If all the parts from a location are moved the system deletes the source location copy record and displays the LOCATION COPY SUMMARY. If parts remain at a location, then the PIECES/PARTS SUMMARY screen of the source location copy record displays. In this example, only one piece/ part was moved. In the Online Catalogue display, the moved piece/part has been removed from the source bibliographic record and now appears on the target bibliographic record.

Source Record

```
                  Online Catalogue PIECES / PARTS SUMMARY
Local Control # :10002476
LCN     :1000500900 Call #: AE5.E363 1992              ISSN:
Title   :The New encyclopaedia Britannica
Imprint :Chicago : Encyclopaedia Britannica, c199+       LCCN: 90084190

    Part number/Bound label      Status              Barcoded
    ----------------------       ------              --------
 1.  Pt.A                        Received            N
 2.  Pt.B                        Received            N
 3.  Pt.C                        Received            N
 4.  Pt.D                        Received            N
 5.  V.T-Z                       Received            N
 6.  V.P-S                       Received            N
 7.  V.L-O                       Received            N
 8.  V.H-K                       Received            N
 9.  V.D-G                       Received            N
10.  V.A-C                       Available           Y

10 item(s) in list
Options:   Display item/piece record
 # item   Delete item(s)   Move #(s)   Limit list   Quit holdings   ? Help
 Exit
```

Target Record

```
                  Online Catalogue - BRIEF DISPLAY        (1 of 1 titles)
Local Control # :10002476
LCCN          :80070040 //r81
TITLE         :Library guide to Encyclopaedia Britannica, 15th edition
Pub/Size      :Encyclopaedia Britannica, 29 cm.

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.  ADVLIB Central GENERAL  /Regular print
     Multipart CD-ROM: CD.1




1 item(s) in list.
Options:
 # item   Prior screen   Holdings edit   Extend search   Full display
 Limit list   Output   MARC   Order display   Review search   OPAC parms
 New search   Reset   ? Help
```

Moving Pieces to Another Bibliographic Record

Purpose   Move pieces to another bibliographic record.

This procedure demonstrates how to move selected pieces from the PIECES SUMMARY screen to a target bibliographic record. When the move is complete, the Type of Holding, Parts, and Publication Pattern records are copied to the target bibliographic record. These records would be deleted from the source records if there are no pieces that require these definitions.

In this example, a piece on CD-ROM will be moved to a different bibliographic record.

Task Summary

1. Search screen for the source record (that is, the record whose holdings you want to move) the select the *Holdings edit* option.

2. Select the Pieces display option. The PIECES SUMMARY record appears.

3. Use the *Move #(s)* option and the line numbers of the pieces you want to move.

4. The system prompts you for the type of move. Enter B (Bibliographic).

5. The system prompts for confirmation. Enter Y.

6. Enter a search string.

7. Use the *Retrieve* option to retrieve the target bibliographic record.

Procedure

```
                        Online Catalogue - BRIEF DISPLAY        (1 of 1 titles)
Local Control # :10002476
LCCN            :80070040 //r81
TITLE           :Library guide to Encyclopaedia Britannica, 15th edition
Pub/Size        :Encyclopaedia Britannica, 29 cm.

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.  ADVLIB Central GENERAL  /Regular print
     Multipart CD-ROM: CD.3 CD.2 CD.1




1 item(s) in list.
Options:
 # item   Prior screen   Holdings edit   Extend search   Full display
 Limit list   Output   MARC   Order display   Review search   OPAC parms
 New search   Reset   ? Help
```

1. From the OPAC display select *Holdings edit*. The option line changes.

```
                        Online Catalogue - BRIEF DISPLAY        (1 of 1 titles)
Local Control # :10002476
LCCN            :80070040 //r81
TITLE           :Library guide to Encyclopaedia Britannica, 15th edition
Pub/Size        :Encyclopaedia Britannica, 29 cm.

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.  ADVLIB Central GENERAL  /Regular print
     Multipart CD-ROM: CD.3 CD.2 CD.1




1 item(s) in list.
Options:
 OPAC display   Pieces display   Type of holdings display   Parts display
 Pub. pattern display   Locations display   Serial copy display
 Check-in serials   Bibliographic edit   Order display   Exit
```

2. Select *Pieces display*. The PIECES SUMMARY screen appears.

```
                    PIECES SUMMARY                           MASTER

LCN      :10002476   Call #: AE5.E363 1974 Suppl        ISSN:
Title    :Library guide to Encyclopaedia Britannica, 15th edition
Imprint  :Chicago : Encyclopaedia Britannica, c198+      LCCN: 80070040 //r8

     Pieces key        Location Information  Current Status   Numbering    Notes
     ----------        -------------------   --------------   ---------    -----
 1.  39999000249       ADVLIB Central        Available        CD.3         N
                       GENERAL
 2.  39999000248       ADVLIB Central        Available        CD.2         N
                       GENERAL
 3.  39999000247       ADVLIB Central        Available        CD.1         N
                       GENERAL




3 item(s) in list.
Options: 3
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

3. Select the *Move # (s)* option and enter the line number(s) of the pieces that you want to move.

```
               PIECES SUMMARY                              MASTER

LCN      :10002476   Call #: AE5.E363 1974 Suppl          ISSN:
Title    :Library guide to Encyclopaedia Britannica, 15th edition
Imprint  :Chicago : Encyclopaedia Britannica, c198+       LCCN: 80070040 //r8

     Pieces key       Location Information  Current Status   Numbering   Notes
     ----------       -------------------- --------------   ---------   -----
 1.  39999000249      ADVLIB Central        Available        CD.3        N
                      GENERAL
 2.  39999000248      ADVLIB Central        Available        CD.2        N
                      GENERAL
 3.  39999000247      ADVLIB Central        Available        CD.1        N
                      GENERAL




3 item(s) in list.

Move to new Bibliographic record (B) or to new Location (L)?    B
Select 'B' to move holdings to another bibliographic record
Select 'L' to move holdings to another location on this bib
```

4. The system prompts you for the type of move: to a bibliographic record, or to a location. Select B .

```
               PIECES SUMMARY                              MASTER

LCN      :10002476   Call #: AE5.E363 1974 Suppl          ISSN:
Title    :Library guide to Encyclopaedia Britannica, 15th edition
Imprint  :Chicago : Encyclopaedia Britannica, c198+       LCCN: 80070040 //r8

     Pieces key       Location Information  Current Status   Numbering   Notes
     ----------       -------------------- --------------   ---------   -----
 1.  39999000249      ADVLIB Central        Available        CD.3        N
                      GENERAL
 2.  39999000248      ADVLIB Central        Available        CD.2        N
                      GENERAL
 3.  39999000247      ADVLIB Central        Available        CD.1        N
                      GENERAL




Checking order status and permissions, please be patient


1 of 1 can be moved. Move it (Y/N)? Y
```

5. ADVANCE tells you how many items can be moved and asks you to confirm. (A warning message appears if you are moving the last piece.) Enter Y.

```
            PIECES SUMMARY                               MASTER

 LCN     :10002476   Call #: AE5.E363 1974 Suppl        ISSN:
 Title   :Library guide to Encyclopaedia Britannica, 15th edition
 Imprint :Chicago : Encyclopaedia Britannica, c198+     LCCN: 80070040 //r8

      Pieces key        Location Information  Current Status   Numbering   Notes
      ----------        -------------------- --------------   ---------   -----
  1.  39999000249       ADVLIB Central       Available        CD.3        N
                        GENERAL
  2.  39999000248       ADVLIB Central       Available        CD.2        N
                        GENERAL
  3.  39999000247       ADVLIB Central       Available        CD.1        N
                        GENERAL




 Checking order status and permissions, please be patient

  Enter new LCN or search string : 10005009
```

6. The system prompts you for a LCN or search string. Enter your response and <ENTER>. The system displays the bibliographic record.

```
                         Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10005009
LCCN            :90084190
AUTHOR          :Encyclopaedia Britannica, inc.
TITLE           :The New encyclopaedia Britannica
Pub/Size        :Encyclopaedia Britannica, 29 cm.

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.  ADVLIB Central GENERAL  /Regular print
     Multi-volume set: Pt.A-Pt.D
     Multi-volume Set: V.A-C;V.D-G;V.H-K;V.L-O;V.P-S;V.T-Z




1 item(s) in list.
Options:
 # item   Retrieve   Prior screen   Extend search   Full display
 Limit list   Output   MARC   Order display   Review search   OPAC parms
 New search   Reset   ? Help
```

7. Select *Retrieve*. When you <Enter> ADVANCE moves the pieces to the new bibliographic record.

```
                         Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10005009
LCCN            :90084190
AUTHOR          :Encyclopaedia Britannica, inc.
TITLE           :The New encyclopaedia Britannica
Pub/Size        :Encyclopaedia Britannica, 29 cm.

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.  ADVLIB Central GENERAL  /Regular print
     Multi-volume set: Pt.A-Pt.D
     Multi-volume Set: V.A-C;V.D-G;V.H-K;V.L-O;V.P-S;V.T-Z






1 holdings moved from 10002476 to 10005009
Press <ENTER>
```

```
                PIECES SUMMARY                          MASTER

LCN     :10002476  Call #: AE5.E363 1974 Suppl        ISSN:
Title   :Library guide to Encyclopaedia Britannica, 15th edition
Imprint :Chicago : Encyclopaedia Britannica, c198+     LCCN: 80070040 //r8

     Pieces key        Location Information  Current Status   Numbering   Notes
     ----------        -------------------- --------------   ---------   -----
 1.  39999000249       ADVLIB Central        Available        CD.3        N
                       GENERAL
 2.  39999000248       ADVLIB Central        Available        CD.2        N
                       GENERAL




2 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

If all the pieces are moved the system deletes the Type of Holding, Location Copy, Parts, and Publication Pattern records from the source and displays a blank PIECES SUMMARY screen. These records are copied to the target pieces record. If parts remain at a location, then the PIECES SUMMARY screen of the source record displays. In this example, only one piece was moved. In the Online Catalogue display, the moved piece has been removed from the source bibliographic record and now appears on the target bibliographic record.

Source Record

```
                        Online Catalogue - BRIEF DISPLAY       (1 of 1 titles)
Local Control # :10002476
LCCN           :80070040 //r81
TITLE          :Library guide to Encyclopaedia Britannica, 15th edition
Pub/Size       :Encyclopaedia Britannica, 29 cm.

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.  ADVLIB Central GENERAL  /Regular print
     Multipart CD-ROM: CD.3 CD.2




1 item(s) in list.
Options:
 Full display  # item   Exit
```

Target Record

```
                        Online Catalogue - BRIEF DISPLAY       (1 of 1 titles)
Local Control # :10005009
LCCN           :90084190
AUTHOR         :Encyclopaedia Britannica, inc.
TITLE          :The New encyclopaedia Britannica
Pub/Size       :Encyclopaedia Britannica, 29 cm.

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.  ADVLIB Central GENERAL  /Regular print
     Multi-volume set: Pt.D-Pt.A
     Multi-volume Set: V.A-C;V.D-G;V.H-K;V.L-O;V.P-S;V.T-Z
 2.  ADVLIB Central GENERAL  /Regular print
     Multipart CD-ROM: CD.1




2 item(s) in list.
Options:
 # item   Prior screen   Holdings edit   Extend search   Full display
 Limit list   Output   MARC   Order display   Review search   OPAC parms
 New search   Reset   ? Help
```

Moving Pieces to Another Location

Purpose

Move pieces to another location.

This procedure demonstrates how to move selected pieces from the PIECES SUMMARY screen to a target location copy record.

In this example, three pieces will be moved to a different location.

Task Summary

1. Obtain the search screen for the source record (that is, the record whose holdings you want to move) and select the *Holdings edit* option.

2. Select the *Pieces display* option. The PIECES SUMMARY screen appears.

3. Use the *Move # (s)* option to select the pieces that you want to move.

4. The system prompts you for the type of move. Enter L (Location).

5. The system tells you how many pieces can be moved and prompts for confirmation. Enter Y.

6. Use the *Retrieve #* option to retrieve the target Location Copy record. Or, use the *Add item* option to create the Location Copy record.

7. The system prompts you to update the owning information. Answer Y or N. The PIECES SUMMARY screen displays. The pieces have been moved to another location on the same bibliographic record.

Procedure

```
                         Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
  Local Control # :10004434
  LCCN           :88083263
  AUTHOR         :Encyclopaedia Britannica, inc.
  TITLE          :The New Encyclopaedia Britannica
  Pub/Size       :Encyclopaedia Britannica, 29 cm.

  LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
   1.  ADVLIB Central GENERAL
       Issue: N.120 N.121 N.122 N.123 N.124 N.125
       Index: 1993 1994 1995 1996
   2.  ADVLIB Landover GENERAL
       Issue: N.130 N.131
   3.  MAIN BRA1 GEN1


  3 item(s) in list.
  Options:
   # item   Prior screen   Holdings edit   Extend search   Full display
   Limit list   Output   MARC   Order display   Review search   OPAC parms
   New search   Reset   ? Help
```

1. From the OPAC display select *Holdings edit*. The option line changes.

```
                         Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
  Local Control # :10004434
  LCCN           :88083263
  AUTHOR         :Encyclopaedia Britannica, inc.
  TITLE          :The New Encyclopaedia Britannica
  Pub/Size       :Encyclopaedia Britannica, 29 cm.

  LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
   1.  ADVLIB Central GENERAL
       Issue: N.120 N.121 N.122 N.123 N.124 N.125
       Index: 1993 1994 1995 1996
   2.  ADVLIB Landover GENERAL
       Issue: N.130 N.131
   3.  MAIN BRA1 GEN1

3 item(s) in list.
 Options:
  OPAC display   Pieces display   Type of holdings display   Parts display
  Pub. pattern display   Locations display   Serial copy display
  Check-in serials   Bibliographic edit   Order display   Exit
```

2. Select *Pieces display.* The PIECES SUMMARY screen appears.

```
               PIECES SUMMARY                            MASTER

LCN     :10004434  Call #: AE5.E363 1990            ISSN:
Title   :The New Encyclopaedia Britannica
Imprint :Chicago, Ill. : Encyclopaedia Britannica+     LCCN: 88083263

     Pieces key     Location Information  Current Status   Numbering   Notes
     ----------     --------------------  --------------   ---------   -----
 1.  39999000402    ADVLIB Central        Available        N.120       N
                    GENERAL
 2.  39999000123    ADVLIB Central        Available        N.121       N
                    GENERAL
 3.  39999000152    ADVLIB Central        Available        N.122       N
                    GENERAL                                N.123
 4.  39999000133    ADVLIB Central        Available        N.124       N
                    GENERAL
 5.  39999000134    ADVLIB Central        Available        N.125       N
                    GENERAL

7 item(s) in list.
Options: 2-4
 # item   Add item   Delete item(s)   Move #(s)   Go to    Forward
 Limit list   Quit holdings   ? Help   Exit
```

3. Select the *Move # (s)* option and enter the line number of the pieces
    that you want to move.

```
                 PIECES SUMMARY                            MASTER

LCN      :10004434   Call #: AE5.E363 1990              ISSN:
Title    :The New Encyclopaedia Britannica
Imprint  :Chicago, Ill. : Encyclopaedia Britannica+     LCCN: 88083263

     Pieces key       Location Information  Current Status  Numbering   Notes
     ----------       -------------------- --------------  ---------   -----
 1.  39999000402      ADVLIB Central       Available       N.120       N
                      GENERAL
 2.  39999000123      ADVLIB Central       Available       N.121       N
                      GENERAL
 3.  39999000152      ADVLIB Central       Available       N.122       N
                      GENERAL                              N.123
 4.  39999000133      ADVLIB Central       Available       N.124       N
                      GENERAL
 5.  39999000134      ADVLIB Central       Available       N.125       N
                      GENERAL


7 item(s) in list.


Move to new Bibliographic record (B) or to new Location (L)?    L
Select 'B' to move holdings to another bibliographic record
Select 'L' to move holdings to another location on this bib
```

4. The system prompts you for the type of move: to a bibliographic record, or to a location. Select L.

```
                 PIECES SUMMARY                              MASTER

 LCN       :10004434   Call #: AE5.E363 1990                ISSN:
 Title     :The New Encyclopaedia Britannica
 Imprint   :Chicago, Ill. : Encyclopaedia Britannica+       LCCN: 88083263

      Pieces key       Location Information  Current Status   Numbering   Notes
      ----------       -------------------- --------------   ---------   -----
  1.  39999000402      ADVLIB Central       Available        N.120       N
                       GENERAL
  2.  39999000123      ADVLIB Central       Available        N.121       N
                       GENERAL
  3.  39999000152      ADVLIB Central       Available        N.122       N
                       GENERAL                                N.123
  4.  39999000133      ADVLIB Central       Available        N.124       N
                       GENERAL
  5.  39999000134      ADVLIB Central       Available        N.125       N
                       GENERAL

 7 item(s) in list.

 Move to new Bibliographic record (B) or to new Location (L)?    L
3 of 3 can be moved. Move them (Y/N)? Y
```

5. ADVANCE tells you how many items can be moved and asks you to
   confirm. (A warning message appears if you are moving the last
   piece.) Enter Y. The LOCATION COPY SUMMARY screen appears.

```
                 LOCATION COPY SUMMARY                       MASTER

 LCN       :10004434   Call #: AE5.E363 1990                ISSN:
 Title     :The New Encyclopaedia Britannica
 Imprint   :Chicago, Ill. : Encyclopaedia Britannica+       LCCN: 88083263

      Physical Location    Collection/Call number/Copy    Format
      -----------------    --------------------------     ------
  1.  ADVLIB Central       GENERAL                        not defined
  2** ADVLIB Central       GENERAL                        not defined
  3.  ADVLIB Landover      GENERAL                        not defined
  4.  MAIN BRA1            GEN1                           not defined

 4 item(s) in list.
 Options: 4
   Retrieve #   # item   Add item   Limit list   Quit holdings   ? Help
   Exit
```

6. Use the *Retrieve #* option to select the target location for the pieces. (Or, use the *Add item* option to define the location.)

```
              LOCATION COPY SUMMARY                        MASTER

 LCN     :10004434   Call #: AE5.E363 1990           ISSN:
 Title   :The New Encyclopaedia Britannica
 Imprint :Chicago, Ill. : Encyclopaedia Britannica+    LCCN: 88083263

      Physical Location    Collection/Call number/Copy    Format
      ------------------   --------------------------     ------
  1.  ADVLIB Central       GENERAL                        not defined
  2** ADVLIB Central       GENERAL                        not defined
  3.  ADVLIB Landover      GENERAL                        not defined
  4.  MAIN BRA1            GEN1                           not defined




  4 item(s) in list.


 Update owning info from current info for attached PIECES (Y/N) ? :  Y
```

7. The system prompts:

   ```
   Update owning info from current info for attached PIECES
   (Y/N) ? :
   ```

   If you answer Yes, the owning and current information will be the same on the piece.

8. The PIECES SUMMARY screen appears.

```
                  PIECES SUMMARY                           MASTER
LCN     :10004434   Call #: AE5.E363 1990            ISSN:
Title   :The New Encyclopaedia Britannica
Imprint :Chicago, Ill. : Encyclopaedia Britannica+     LCCN: 88083263

      Pieces key      Location Information  Current Status  Numbering   Notes
      ----------      -------------------  --------------  ---------   -----
 1.  39999000402     ADVLIB Central       Available       N.120       N
                     GENERAL
 2.  39999000134     ADVLIB Central       Available       N.125       N
                     GENERAL
 3.  39999000455     ADVLIB Landover      Available       N.130       N
                     GENERAL
 4.  39999000153     ADVLIB Landover      Available       N.131       N
                     GENERAL
 5.  39999000123     MAIN BRA1 GEN1       Available       N.121       N
 6.  39999000152     MAIN BRA1 GEN1       Available       N.122       N
                                                          N.123
7 item(s) in list.
Options:
 # item  Add item  Delete item(s)  Move #(s)  Go to  Forward
 Limit list  Quit holdings  ? Help  Exit
```

The pieces have been moved to the new location and the changes display in the Online Catalogue.

```
                   Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10004434
LCCN          :88083263
AUTHOR        :Encyclopaedia Britannica, inc.
TITLE         :The New Encyclopaedia Britannica
Pub/Size      :Encyclopaedia Britannica, 29 cm.

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.  ADVLIB Central GENERAL
     Issue: N.120,N.125
     Index: 1993 1994 1995 1996
 2.  ADVLIB Landover GENERAL
     Issue: N.130 N.131
 3.  MAIN BRA1 GEN1
     Issue: N.121 N.122 N.123 N.124


3 item(s) in list.
Options:
 Full display  # item  Exit
```

If all the pieces are moved the system deletes the Type of Holding, Location Copy, Parts, and Publication Pattern records from the source and displays a blank PIECES SUMMARY screen. These records are copied to the target pieces record. If parts remain at a location, then the PIECES SUMMARY screen of the source record displays. In this example, three pieces were moved. In the Online Catalogue display, the moved pieces appear at the target location.

6

Other Holdings Tasks

This chapter describes how to use holdings to:

- convert single-part holdings to multiparts

- create electronic holdings

- sequence parts

- sequence Types of Holdings records

- create placeholder barcodes for use in circulating unbarcoded materials

- circulate material that will never be catalogued using the Fast Add function

- add action notes, reproduction notes, and so forth, to specific pieces and locations.

Converting Single-part Holdings to a Multipart

When you convert a single-part holding to a multipart, ADVANCE automatically creates three new records:

- Type of Holding record with the description Bound PIECES

- Publication Pattern Record with a pattern (Unknown.)

- Part Record identified as ???

These records are linked to the existing location copies. There will be the same number of location copies as there were before you converted the holding, but only one part will exist.

You will need to edit the Type of Holding, Publication Pattern and Parts records. If the pieces record represents different parts, new parts records will have to be created.

NOTE: If you had multiple single-part pieces, the pieces will share the same enumeration. However, if the pieces require different numbering you must unlink this part and link the piece to a new part. Enter ?? at the *Volume/Part#* field on the PIECES DETAIL screen to access the LINKED PARTS screen.

```
                    Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10001761
LCCN            :77094292 //r88
TITLE           :The New Encyclopaedia Britannica
Pub/Size        :Encyclopaedia Britannica, 29 cm.

CURRENT LOCATION & COPIES HELD:
     Location           Collection      Call Number/Copy #      Status / Due
     --------           ----------      ------------------      -----------
 1.  ADVLIB Central     GENERAL         AE5. E363 c.5           Available




1 item(s) in list.
Options:
 # item   Prior screen   Holdings edit   Extend search   Full display
 Limit list   Output   MARC   Order display   Review search   OPAC parms
 New search   Reset   ? Help
```

1. From the search screen, select the *Holdings edit* option. The option line changes.

```
                      Online Catalogue - BRIEF DISPLAY        (1 of 1 titles)
Local Control # :10001761
LCCN            :77094292 //r88
TITLE           :The New Encyclopaedia Britannica
Pub/Size        :Encyclopaedia Britannica, 29 cm.

CURRENT LOCATION & COPIES HELD:
     Location            Collection      Call Number/Copy #      Status / Due
     --------            ----------      ------------------      ------------
 1.  ADVLIB Central      GENERAL         AE5. E363 c.5           Available




1 item(s) in list.
Options:
 OPAC display    Pieces display    Locations display    Bibliographic edit
 Order display    Exit
```

2. Select the *Pieces display* option. The PIECES SUMMARY screen appears.

```
              PIECES SUMMARY                                    MASTER
LCN     :10001761   Call #: AE5.E363 1979               ISSN:
Title   :The New Encyclopaedia Britannica
Imprint :Chicago : Encyclopaedia Britannica, c197+       LCCN: 77094292 //r8

     Pieces key        Location Information  Current Status   Numbering   Notes
     ----------        --------------------  --------------   ---------   -----
 1.  39999000141       ADVLIB Central        Available                    N
                       GENERAL AE5. E363
                       c.5




1 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Multipart/serial   Go to
 Limit list   Quit holdings   ? Help    Exit
```

3. Select the *Multipart/serial* option.

```
              PIECES SUMMARY                              MASTER

LCN      :10001761   Call #: AE5.E363 1979             ISSN:
Title    :The New Encyclopaedia Britannica
Imprint  :Chicago : Encyclopaedia Britannica, c197+    LCCN: 77094292 //r8

     Pieces key       Location Information  Current Status   Numbering   Notes
     ----------       -------------------   --------------   ---------   -----
 1.  39999000141      ADVLIB Central        Available                      N
                      GENERAL AE5. E363
                      c.5


1 item(s) in list.


You already have pieces, okay to continue?
```

4. The system prompts:

    > You already have pieces, okay to continue?

    Enter Y. (If you say N, the holdings will **not** be converted.)

```
              PIECES SUMMARY                              MASTER

LCN      :10001761   Call #: AE5.E363 1979             ISSN:
Title    :The New Encyclopaedia Britannica
Imprint  :Chicago : Encyclopaedia Britannica, c197+    LCCN: 77094292 //r8

     Pieces key       Location Information  Current Status   Numbering   Notes
     ----------       -------------------   --------------   ---------   -----
 1.  39999000141      ADVLIB Central        Available                      N
                      GENERAL AE5. E363
                      c.5


1 item(s) in list.


Holdings will be converted to multipart format. Okay to continue?  Y
```

5. The system prompts:

Holdings will be converted to multipart format. Okay to
continue?

Enter Y. (If you say N, the holdings will **not** be converted.)

```
               PIECES SUMMARY                               MASTER

LCN     :10001761   Call #: AE5.E363 1979              ISSN:
Title   :The New Encyclopaedia Britannica
Imprint :Chicago : Encyclopaedia Britannica, c197+      LCCN: 77094292 //r8

     Pieces key       Location Information  Current Status  Numbering   Notes
     ----------       -------------------- --------------  ---------   -----
 1.  39999000141      ADVLIB Central        Available        ???         N
                      GENERAL AE5. E363
                      c.5




1 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

6. Select the *Go to* option. The option line changes.

```
               PIECES SUMMARY                               MASTER

LCN     :10001761   Call #: AE5.E363 1979              ISSN:
Title   :The New Encyclopaedia Britannica
Imprint :Chicago : Encyclopaedia Britannica, c197+      LCCN: 77094292 //r8

     Pieces key       Location Information  Current Status  Numbering   Notes
     ----------       -------------------- --------------  ---------   -----
 1.  39999000141      ADVLIB Central        Available        ???         N
                      GENERAL AE5. E363
                      c.5




1 item(s) in list.
Options:
 OPAC display   Pieces display   Type of holdings display   Parts display
 Pub. pattern display   Locations display   Serial copy display
 Check-in serials   Bibliographic edit   Order display   Exit
```

7. Select the *Type of holdings display* option. The TYPE OF HOLDING SUMMARY screen appears.

Editing the Type of Holding Record

Multipart holdings require a Type of Holding record. When you convert single-part holdings to multipart the system supplies a default Type of Holding record that is defined as Bound Pieces. Use the *# item* option to edit an existing record. If you attempt to delete the last Type of Holding record the system issues a warning and you will not be allowed to delete the record.

```
                    TYPE OF HOLDING SUMMARY                    MASTER

 LCN     :10001761   Call #: AE5.E363 1979              ISSN:
 Title   :The New Encyclopaedia Britannica
 Imprint :Chicago : Encyclopaedia Britannica, c197+      LCCN: 77094292 //r8

     Description                     Type  Supplement/Index type
     -----------                     ----  --------------------
  1. Bound PIECES                    ISS
     Captions/Labels: (Unknown.)




 1 item(s) in list
 Options:
  # item   Add item   Delete item(s)   Sequence TOHs   Move #(s)   Go to
  Limit list   Quit holdings   ? Help   Exit
```

1. Select the *# item* option and enter 1 (Bound PIECES). The Type of Holding Detail record appears.

```
            TYPE OF HOLDING DETAIL                         MASTER

LCN     :10001761   Call #: AE5.E363 1979              ISSN:
Title   :The New Encyclopaedia Britannica
Imprint :Chicago : Encyclopaedia Britannica, c197+     LCCN: 77094292 //r8


1. Description        : Bound PIECES          3. Publication Type: 0  - ISS
2. Supplement/Index Type:
                          ** ACTIVE **   - (1 of 1 Publication Patterns)
Enumeration      Level 1     Level 2    Level 3   Level 4  Level 5  Level 6
 Caption        : (Unknown.)
 Alternate Caption:

Chronology       Level 1     Level 2    Level 3   Level 4
 Caption        :
 Alternate Caption:
Frequency :
Notes     :

Options:
 # line   Line by line   Patterns   Parts   Delete   File   Quit holdings
 ? Help   Exit
```

2. Edit the numbered fields. The *Description* field appears in the Summary Holdings Statements so you should edit this field to contain appropriate text. *File.* The TYPE OF HOLDING SUMMARY screen appears.

NOTE: The *Enumeration* and *Chronology* (numbering and dates) fields can not be changed from this screen. They are accessed from the *Patterns* option from the TYPE OF HOLDING DETAIL screen or from the *Pub.Pattern display* option in Holdings edit.

```
                    TYPE OF HOLDING DETAIL                        MASTER

LCN      :10001761   Call #: AE5.E363 1979              ISSN:
Title    :The New Encyclopaedia Britannica
Imprint  :Chicago : Encyclopaedia Britannica, c197+        LCCN: 77094292 //r8


1. Description         : Multipart Set        3. Publication Type: 0  - ISS
2. Supplement/Index Type:
                           ** ACTIVE **    - (1 of 1 Publication Patterns)
Enumeration         Level 1     Level 2    Level 3   Level 4  Level 5  Level 6
 Caption        : (Unknown.)
 Alternate Caption:

Chronology          Level 1     Level 2    Level 3   Level 4
 Caption        :
 Alternate Caption:
Frequency :
Notes     :

Options:
 # line   Line by line   Patterns   Parts   Delete   File   Quit holdings
 ? Help   Exit
```

3. Select the *Patterns* option. The PUBLICATION PATTERN SUMMARY
    screen appears.

```
              PUBLICATION PATTERN SUMMARY                      MASTER

LCN      :10001761   Call #: AE5.E363 1979              ISSN:
Title    :The New Encyclopaedia Britannica
Imprint  :Chicago : Encyclopaedia Britannica, c197+        LCCN: 77094292 //r8

     Enumeration/Chronology    Frequency     Description
     ----------------------    ---------     -----------
 1.  (Unknown.)                              Multipart Set



1 item(s) in list
Options:
 # item   Add item   Limit list   Quit holdings   ? Help   Exit
```

4. Use the *# item* option to select pattern 1, *Unknown*. The PUBLICA-
    TION PATTERN DETAIL screen appears.

```
                 PUBLICATION PATTERN DETAIL                      MASTER
                                            (1 of 1 Publication Patterns)
LCN      :10001761   Call #: AE5.E363 1979            ISSN:
Title    :The New Encyclopaedia Britannica
Imprint  :Chicago : Encyclopaedia Britannica, c197+      LCCN: 77094292 //r8
Publication Type:ISS - Multipart Set                         ** ACTIVE **
1. Enumeration      Level 1      Level 2     Level 3    Level 4  Level 5 Level 6
   Caption/Label   : Pt.
   Number of Parts :
   Numbering Code  :
2. Chronology       Level 1      Level 2     Level 3    Level 4
   Caption/Label   : (Date)
   Code            :
3. Copy Caption    :
4. Ind/Supp Caption:                             Associated Level:
5. Frequency Code  :                             6. Auto Prediction : Y
7. Regularity Pattern:



8. Date Range      :
Options:
 # line   Line by line   Second screen   Predictions   MARC   Delete   File
 Quit holdings   ? Help   Exit
```

5. Edit the appropriate fields. For multipart holdings that are not under serials control, the caption fields are the only ones that need to be edited. *File*.

The system prompts:

```
Is this publication pattern going to be used to predict
issues?
```

Answer Y or N.

If this is a new publication pattern the system prompts:

```
Can holdings data for this publication pattern be
compressed?
```

Answer Y or N.

If you are editing an existing publication pattern the system prompts:

```
Do you want to retain the old record ? (Y/N)
```

Answer Y or N.

The PUBLICATION PATTERN SUMMARY screen appears.

```
              PUBLICATION PATTERN SUMMARY                   MASTER

LCN      :10001761   Call #: AE5.E363 1979              ISSN:
Title    :The New Encyclopaedia Britannica
Imprint  :Chicago : Encyclopaedia Britannica, c197+      LCCN: 77094292 //r8


     Enumeration/Chronology    Frequency     Description
     ---------------------    ---------    -----------
 1.  Pt.:(Date)                            Multipart Set




1 item(s) in list
Options:
 # item   Add item   Limit list   Quit holdings   ? Help   Exit
```

6. *Exit.* The TYPE OF HOLDING DETAIL screen appears.

```
                 TYPE OF HOLDING DETAIL                      MASTER

LCN      :10001761   Call #: AE5.E363 1979              ISSN:
Title    :The New Encyclopaedia Britannica
Imprint  :Chicago : Encyclopaedia Britannica, c197+      LCCN: 77094292 //r8


1. Description         : Multipart Set       3. Publication Type: 0  - ISS
2. Supplement/Index Type:
                          ** ACTIVE **   - (1 of 1 Publication Patterns)
Enumeration        Level 1    Level 2    Level 3   Level 4  Level 5  Level 6
 Caption         : Pt.
 Alternate Caption:

Chronology         Level 1    Level 2    Level 3   Level 4
 Caption         : (Date)
 Alternate Caption:
Frequency :
Notes     :

Options:
 # line   Line by line   Patterns   Parts   Delete   File   Quit holdings
 ? Help   Exit
```

7. Select the *Parts* option. The PARTS SUMMARY screen appears.

```
              PARTS SUMMARY                            MASTER

LCN     :10001761   Call #: AE5.E363 1979            ISSN:
Title   :The New Encyclopaedia Britannica
Imprint :Chicago : Encyclopaedia Britannica, c197+      LCCN: 77094292 //r8


     Part Number              Type of Holding
     -----------              ---------------
 1.  Pt.???                   Multipart Set - ISS




1 item(s) in list
Options:
 Sequence parts    Move #(s)   # item   Insert at line #   Limit list
 Quit holdings   ? Help   Exit
```

8. Use the *# item* to select the *Pt. ???* record. The PARTS DETAIL screen appears.

```
              PARTS DETAIL                             MASTER

LCN     :10001761   Call #: AE5.E363 1979            ISSN:
Title   :The New Encyclopaedia Britannica
Imprint :Chicago : Encyclopaedia Britannica, c197+      LCCN: 77094292 //r8


 PARTS key :  10004048
1. Type of Holding    : Multipart set   8. Title       :
2. Publication Pattern : Pt.:(Date)      9. Copyright Fee :
3. Enumeration/Chronology :             10. Gregorian Year:
   Pt.    : ???
   (Date) :

4. Alternate Enumeration/Chronology :

5. Status : Received    1/1 ;  - 06/09/98
6. Barcode: 39999000291
7. Nonpublic notes:

Options:
 # line   Line by line   File   Delete   Quit holdings   ? Help   Exit
```

9. Edit the *Enumeration/Chronology* fields. *File*.

Adding Notes

If you want to add notes, use the *# line* option to select lines 5-7 on the PARTS DETAIL screen. A window opens. Select the *Notes Update* option to open the notes screen.

```
                    PARTS DETAIL                              MASTER

LCN      :10001761   Call #: AE5.E363 1979              ISSN:
Title    :The New Encyclopaedia Britannica
Imprint  :Chicago : Encyclopaedia Britannica, c197+      LCCN: 77094292 //r8

PART NUMBERING: Pt.A(JUN 1996 )
+-------------------------------------------------------------------------+
|    CURRENT LOCATION  STATUS            DATE     BARCODE          NOTES |
|  1 AL CENTRAL        1  - Received    06/09/98 39999000291         N   |
|    GENERAL AE5. E...                                                   |
|                                                                       |
|                                                                       |
|                                                                       |
|                                                                       |
|                                                                       |
|                                                                       |
|                                                                       |
|                                                                       |
+-------------------------------------------------------------------------+

Options:
 # line    Line by line   Location add   Column by Column   Accept
 Add Barcodes    Notes Update   Forward    Backward   ? Help   Exit
```

The system inserts default information into the window. When you have completed your editing select *Accept*. The PARTS DETAIL screen appears. *File*. The PARTS SUMMARY screen appears. *Exit*. The TYPE OF HOLDING DETAIL screen appears. *File.* The single-part is now a multi-part.

Creating Electronic Holdings

Electronic holdings require a location copy record only. Because electronic holdings do not have barcodes, a Piece record is not necessary. Electronic holdings can exist on a bibliographic record with real physical holdings. Electronic holdings are defined by adding 856 tags to the MARC holdings record in the electronic location copy record. Use multiple 856 tags if necessary.

Create Institution Codes for Electronic Titles

Use the Institution Code table (CHIC) and/or the Sublocation/Building Code (CHSC) on HOLDING SETUP MENU from the Cataloguing Holdings Menu (CHM) to create institution and sublocation codes for electronic holdings. These codes are necessary if you want your electronic titles to display in the online catalogue.

Create a Workform

To assign the URL (Uniform Resource Locator) to an electronic title, you must edit the 856 field in the MARC holdings record. Before you can edit the record, you should either:

- ensure that tag 856 is defined in Tag & Subfield Descriptions (BTSD) and specified for holdings format (HO) in Tag & Subfield Edit Checks (BTSE), or

- create a cataloguing workform for electronic titles. Workforms are defined on Cataloguing Workforms (BCW) screen on the Bibliographic Set-up Menu (BSM) from the Bibliographic Cataloguing Menu (BCM).

Defining Level 2 and Level 4 OPAC Display

Use the OPAC Display Level Four and the OPAC Display Level Two table on the Holdings Display Menu (OHD) to define what information appears in the Online Catalogue for your electronic holdings. (See the Online Catalogue Guide for more information about specifying the Holdings Display Definitions.)

Task

In this example, an electronic location is added to an existing title. To create only an electronic location use the *Add item* option from the LOCATION COPY SUMMARY screen.

1. Obtain the search screen.

```
                        Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10003333
LCCN            :84015406 //r953
AUTHOR          :Genaway, David C., 1937-
TITLE           :Integrated online library systems : principles, planning, and
                 implementation
Pub/Size        :Knowledge Industry Publications, 29 cm.

CURRENT LOCATION & COPIES HELD:
     Library  Locn          Call Number           Ltype    Status / Due date
     -------  -------   -------------------------  -----    ----------------
 1.  Central  GEN-STA   c.3                        2week    In Processing
 2.  Central  GENERAL   c.2                        INTUSE   DUE: 02/26/98 23:




2 item(s) in list.
Options:
 # item   Prior screen   Holdings edit   Extend search   Full display
 Limit list   Output   MARC   Order display   Review search   OPAC parms
 New search   Reset   ? Help
```

2. Select *Holdings edit*. The option line changes.

```
                        Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
```
• Local Control # :10003333
```
LCCN            :84015406 //r953
AUTHOR          :Genaway, David C., 1937-
TITLE           :Integrated online library systems : principles, planning, and
                 implementation
Pub/Size        :Knowledge Industry Publications, 29 cm.

CURRENT LOCATION & COPIES HELD:
     Library  Locn          Call Number           Ltype    Status / Due date
     -------  -------   -------------------------  -----    ----------------
 1.  Central  GEN-STA   c.3                        2week    In Processing
 2.  Central  GENERAL   c.2                        INTUSE   DUE: 02/26/98 23:



2 item(s) in list.
Options:
 OPAC display   Pieces display   Locations display   Bibliographic edit
 Order display   Exit
```

3. Select *Locations display.* The LOCATION COPY SUMMARY screen appears.

```
              LOCATION COPY SUMMARY                        MASTER

LCN     :10003333   Call #: Z678.9.G45 1984            ISSN:
Title   :Integrated online library systems : principles, planning, and impl+
Imprint :White Plains, NY : Knowledge Industry Pu+        LCCN: 84015406 //r9

     Physical Location     Collection/Call number/Copy     Format
     -----------------     --------------------------      ------
 1.  ADVLIB Central        GEN-STAFF c.3                   not defined
 2.  ADVLIB Central        GENERAL c.2                     not defined




2 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

4. Select the *Add item* option. The system displays a new LOCATION COPY DETAIL record.

```
               LOCATION COPY DETAIL                        MASTER

LCN     :10003333   Call #: Z678.9.G45 1984            ISSN:
Title   :Integrated online library systems : principles, planning, and impl+
Imprint :White Plains, NY : Knowledge Industry Pu+        LCCN: 84015406 //r9


** New record **
 1. Institution    : WWW=World Wide W  9. Coded Location    :
 2. Sublocation    :                  10. Non-coded Location :
 3. Collection code :                 11. Classification src.:
 4. Call # prefix  :                  12. Shelving Title    :
 5. Call number    :                  13. Copyright fee code :
 6. Call # suffix  :                  14. Materials specified:
 7. Copy number    :                  15. Placeholder only  : N
 8. Retention policy: 8               16. Physical format   :


Options:
 # line   Line by line   MARC Holdings   Binding information   File
 Delete   Quit holdings   ? Help   Exit
```

5. Enter the Institution Code defined for your electronic holdings. After completing the record, select the *MARC holdings* option to edit the 856 tag. The LOCATION COPY MARC EDIT DISPLAY screen appears.

```
                  LOCATION COPY MARC EDIT MARC DISPLAY

       Control # : New record  Transaction type : RECON
Last updated    :                Leader           : cxH   2     mn
Format type     : Holdings format

008      9804010|||||8   |001|||||0980401
852 BB b WWW




Options:
 ? Help   # tag   Leader   Overlay workform   Reformat   Restore
 Labelled display   Print   Backward   Forward   Quit holdings   Exit
 Accept   Toggle mode
```

6. Select the *Overlay workform* option. The system displays the names of the workforms that are already defined and prompts you for a workform.

```
                  LOCATION COPY MARC EDIT MARC DISPLAY

       Control # : New record  Transaction type : RECON
Last updated    :                Leader           : cxH   2     mn
Format type     : Holdings format

008      9804010|||||8   |001|||||0980401
852 BB b WWW




Valid Workforms    : ELECT.LOC


Enter workform name : ELECT.LOC
```

7. Enter a workform name.

```
                  LOCATION COPY MARC EDIT MARC DISPLAY

       Control # : New record   Transaction type : RECON
Last updated    :               Leader           : cxH  2    mn
Format type     : Holdings format

008      9804010|||||8  |001|||||0980401
852 BB b WWW







(1) Workform over Record or (2) Record over Workform : 1
```

8. The system prompts: `(1) Workform over Record or (2) Record
    over Workform`. Enter 1. The system displays the tags you have
    defined for the workform you selected.

```
                  LOCATION COPY MARC EDIT MARC DISPLAY

       Control # : 10031832    Transaction type : RECON
Last updated    :               Leader           : cxH  2    mn
Format type     : Holdings format

008      9804230|||||8  |001|||||0980423
852 BB b WWW
856 1B a advance.net
      b 123.456.789
      c use WinZip
      d /a2/work/adv/alib/file3
      f intro.doc
      s 23456 bytes
      u http://info.lib.uh.edu/sepb/sepb.html
      z This document is available in html and text formats.



Options:
 ? Help   # tag   Leader   Overlay workform   Reformat   Restore
 Labelled display   Print   Backward   Forward   Quit holdings   Exit
 Accept   Toggle mode
```

9. Edit the record and select the *Accept* option. The LOCATION COPY
   DETAIL screen appears.

```
             LOCATION COPY DETAIL                        MASTER

 LCN     :10003333   Call #: Z678.9.G45 1984            ISSN:
 Title   :Integrated online library systems : principles, planning, and impl+
 Imprint :White Plains, NY : Knowledge Industry Pu+       LCCN: 84015406 //r9


 ** New record **
  1. Institution    : WWW=World Wide W  9. Coded Location    :
  2. Sublocation    :                  10. Non-coded Location :
  3. Collection code :                 11. Classification src.:
  4. Call # prefix  :                  12. Shelving Title    :
  5. Call number    :                  13. Copyright fee code :
  6. Call # suffix  :                  14. Materials specified:
  7. Copy number    :                  15. Placeholder only  : N
  8. Retention policy:                 16. Physical format   :

Options:
  # line   Line by line   MARC Holdings   Binding information   File
  Delete   Quit holdings   ? Help   Exit
```

10. Select the *File* option. The LOCATION COPY SUMMARY screen
    appears. Select the *Go to* option and then the *OPAC display*. The
    electronic location appears along with the other copies of the title.
    The Online Catalogue displays whatever was specified for the Level
    2 (single-part title) or the Level 4 (multipart/serial title) display.

```
                        Online Catalogue - BRIEF DISPLAY        (1 of 1 titles)
Local Control # :10003333
LCCN            :84015406 //r953
AUTHOR          :Genaway, David C., 1937-
TITLE           :Integrated online library systems : principles, planning, and
                 implementation
Pub/Size        :Knowledge Industry Publications, 29 cm.

CURRENT LOCATION & COPIES HELD:
     Location          Collection     Call Number/Copy #      Status / Due
     --------          ----------     ------------------      ------------
 1.  ADVLIB Central    GEN-STAFF      c.3                     In Processing
 2.  ADVLIB Central    GENERAL        c.2                     Available
 3.  WWW                                                      In library
     Access: HTML - http://info.lib.uh.edu/sepb/sepb.html




3 item(s) in list.
Options:
 Full display   Exit
```

Sequence Holdings

Parts and Type of Holdings records can be sequenced. You can sort parts within each type of holding only. For example, if your multipart (or serial holdings) consists of issues and indexes, you can not interfile or sort the parts and the indexes together; each of these categories of material can only be sorted within their own Type of Holding.

You can also specify the order in which the Type of Holding for each location copy is displayed. This affects the OPAC display.

Sorting Display

When you make changes to the sorting order from the PARTS SUMMARY screen, the Online Catalogue and Holdings Statements change to reflect the modifications you have made.

NOTE: The OPAC Display Level Five determines whether holdings display in ascending or descending order. You can reach this table by selecting OPAC Holdings Display (OHD) on the Online Search Setup (OSUP) menu.

Sequencing Parts

Task Details

```
                    Online Catalogue - BRIEF DISPLAY        (1 of 1 titles)

Author(s)       :Encyclopaedia Britannica, inc.
Title           :The new encyclopaedia Britannica
Year            :c1995.
Subject         :Encyclopedias and dictionaries
Language        :English

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.  ADVLIB Central GENERAL  /Regular print
     Multi-volume set: Pt.D-Pt.A
     Multipart CD-ROM: CD.1
     INDEXES: Pt.1




1 item(s) in list.
Options:
 # item   Prior screen   Extend search   Limit list   Full display   Output
 MARC   Holds   ILL request   Order display   Review search   OPAC parms
 New search   Reset   ? Help
```

1. From the search screen select the *Holdings edit* option. The option line changes.

```
                    Online Catalogue - BRIEF DISPLAY     (1 of 1 titles)
Local Control # :10006223
LCCN           :93073891
AUTHOR         :Encyclopaedia Britannica, inc.
TITLE          :The new encyclopaedia Britannica
Pub/Size       :Encyclopaedia Britannica, 29 cm.

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.  ADVLIB Central GENERAL  /Regular print
     Multi-volume set: Pt.D-Pt.A
     INDEXES : Pt.1



1 item(s) in list.
Options:
 OPAC display   Pieces display   Type of holdings display   Parts display
 Pub. pattern display   Locations display   Serial copy display
 Check-in serials   Bibliographic edit   Order display   Exit
```

2. Select the *Type of holdings display* option. The TYPE OF HOLDING SUMMARY screen appears.

```
            TYPE OF HOLDING SUMMARY                        MASTER

LCN     :10006223   Call #: AE5.E363 1995              ISSN:
Title   :The new encyclopaedia Britannica
Imprint :Chicago : Encyclopaedia Britannica, c199+      LCCN: 93073891

     Description                   Type  Supplement/Index type
     -----------                   ----  ---------------------
 1.  Multi-volume set              ISS
     Captions/Labels: Pt.
 2.  Multipart CD-ROM              ISS
     Captions/Labels: CD.
 3.  INDEXES                       IND
     Captions/Labels: Pt.


3 item(s) in list
Options:
 # item   Add item   Delete item(s)   Sequence TOHs   Move #(s)   Go to
 Limit list   Quit holdings   ? Help   Exit
```

3. Use the *# item* option to select a type of holding. The TYPE OF HOLDING DETAIL screen appears.

```
                 TYPE OF HOLDING DETAIL                      MASTER

 LCN     :10006223   Call #: AE5.E363 1995              ISSN:
 Title   :The new encyclopaedia Britannica
 Imprint :Chicago : Encyclopaedia Britannica, c199+      LCCN: 93073891


 1. Description         : Multi-volume Set      3. Publication Type: 0  - ISS
 2. Supplement/Index Type:
                             ** ACTIVE **   - (1 of 1 Publication Patterns)
 Enumeration       Level 1     Level 2    Level 3   Level 4   Level 5   Level 6
  Caption        : Pt.
  Alternate Caption:

 Chronology        Level 1     Level 2    Level 3   Level 4
  Caption       :
  Alternate Caption:
 Frequency :
 Notes     :

 Options:
  # line   Line by line   Patterns    Parts    Delete    File    Quit holdings
  ? Help   Exit
```

4. Select the *Parts* option. The PARTS SUMMARY screen appears.

```
                  PARTS SUMMARY                          MASTER

 LCN     :10006223   Call #: AE5.E363 1995              ISSN:
 Title   :The new encyclopaedia Britannica
 Imprint :Chicago : Encyclopaedia Britannica, c199+      LCCN: 93073891


     Part Number          Type of Holding
     -----------          ---------------
  1.  Pt.A                Multi-volume Set - ISS
  2.  Pt.B                Multi-volume Set - ISS
  3.  Pt.C                Multi-volume Set - ISS
  4.  Pt.D                Multi-volume Set - ISS


 4 item(s) in list
  Options:
   Sequence parts   Move #(s)   # item   Insert at line #   Limit list
   Quit holdings   ? Help   Exit
```

5. Select the *Sequence parts* option. The SEQUENCE PARTS screen appears.

```
              SEQUENCE PARTS                            MASTER

 LCN      :10006223   Call #: AE5.E363 1995            ISSN:
 Title    :The new encyclopaedia Britannica
 Imprint  :Chicago : Encyclopaedia Britannica, c199+    LCCN: 93073891

       Part Number               Type of Holding
       -----------               ---------------
  1.  Pt.A                   Multi-volume Set - ISS
  2.  Pt.B                   Multi-volume Set - ISS
  3.  Pt.C                   Multi-volume Set - ISS
  4.  Pt.D                   Multi-volume Set - ISS




 4 item(s) in list
 Options: 6
  # line(s) to move    Quit holdings   ? Help   Exit
```

6. Select the *# line(s) to move* option. Enter the line numbers of the parts you want to move <Enter>. If the line numbers span more than one screen, you can select line numbers that do not appear on the current screen. You can use a range (15-19) or a list separated by commas (4, 7, 9), or a combination of both.

```
              SEQUENCE PARTS                            MASTER

 LCN      :10006223   Call #: AE5.E363 1995            ISSN:
 Title    :The new encyclopaedia Britannica
 Imprint  :Chicago : Encyclopaedia Britannica, c199+    LCCN: 93073891

       Part Number               Type of Holding
       -----------               ---------------
  1.  Pt.A                   Multi-volume Set - ISS
  2.  Pt.B                   Multi-volume Set - ISS
  3.  Pt.C                   Multi-volume Set - ISS
  4.  Pt.D                   Multi-volume Set - ISS
 4 item(s) in list
 Options: 1
  Drop at line #   Quit holdings   ? Help   Exit
```

7. The system prompts you for an insertion point. (The system prompts you to enter the line number where you want to move the part.) Enter the number of the line. The parts will be inserted above the line you specify. For example, if you drop at line 3, the moved lines appear above line 3. After several moves and drops, the parts will be reordered as follows.

```
              SEQUENCE PARTS                                    MASTER

LCN      :10006223   Call #: AE5.E363 1995            ISSN:
Title    :The new encyclopaedia Britannica
Imprint  :Chicago : Encyclopaedia Britannica, c199+     LCCN: 93073891

     Part Number              Type of Holding
     -----------              ---------------
 1.  Pt.D                 Multi-volume Set - ISS
 2.  Pt.C                 Multi-volume Set - ISS
 3.  Pt.B                 Multi-volume Set - ISS
 4.  Pt.A                 Multi-volume Set - ISS

4 item(s) in list
Options:
 # line(s) to move    File   Quit holdings   ? Help   Exit
```

8. The new sequence displays in the Online Catalogue.

```
                  Online Catalogue - BRIEF DISPLAY        (1 of 1 titles)

Author(s)       :Encyclopaedia Britannica, inc.
Title           :The new encyclopaedia Britannica
Year            :c1995.
Subject         :Encyclopedias and dictionaries
Language        :English

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.  ADVLIB Central GENERAL  /Regular print
     Multi-volume set: Pt.A-Pt.D
     Multipart CD-ROM: CD.1
     INDEXES: Pt.1

1 item(s) in list.
Options:
 # item   Prior screen   Extend search   Limit list   Full display   Output
 MARC   Holds   ILL request   Order display   Review search   OPAC parms
 New search   Reset   ? Help
```

Sequencing Types of Holdings Records

You can sort the order of Type of Holdings records in the same way that you sequence parts by moving the records to appear in the sequence you want. This sequencing is done on the TYPE OF HOLDING SUMMARY screen. The sequence below is based on the order that appears on the TYPE OF HOLDING SUMMARY screen.

In this example, the CD-ROM holdings will be moved to display as the first item in the list.

```
                      Online Catalogue - BRIEF DISPLAY        (1 of 1 titles)

Author(s)        :Encyclopaedia Britannica, inc.
Title            :The new encyclopaedia Britannica
Year             :c1995.
Subject          :Encyclopedias and dictionaries
Language         :English

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.  ADVLIB Central GENERAL  /Regular print
     Multi-volume set: Pt.A-Pt.D
     Multipart CD-ROM: CD.1
     INDEXES: Pt.1



1 item(s) in list.
Options:
 # item   Prior screen   Extend search   Limit list   Full display   Output
 MARC   Holds   ILL request   Order display   Review search   OPAC parms
 New search   Reset   ? Help
```

1. From the search screen select the *Holdings edit* option. The option line changes.

```
                        Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10006223
LCCN           :93073891
AUTHOR         :Encyclopaedia Britannica, inc.
TITLE          :The new encyclopaedia Britannica
Pub/Size       :Encyclopaedia Britannica, 29 cm.

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.  ADVLIB Central GENERAL  /Regular print
     Multi-volume set: Pt.A-Pt.D
     Multipart CD-ROM: CD.1
     INDEXES: Pt.1




1 item(s) in list.
Options:
 OPAC display   Pieces display   Type of holdings display   Parts display
 Pub. pattern display   Locations display   Serial copy display
 Check-in serials   Bibliographic edit   Order display   Exit
```

2. Select the *Type of holdings display* option. The TYPE OF HOLDING
   SUMMARY screen appears.

```
            TYPE OF HOLDING SUMMARY                        MASTER

LCN     :10006223   Call #: AE5.E363 1995             ISSN:
Title   :The new encyclopaedia Britannica
Imprint :Chicago : Encyclopaedia Britannica, c199+      LCCN: 93073891

    Description                    Type  Supplement/Index type
    -----------                    ----  --------------------
 1.  Multi-volume set              ISS
     Captions/Labels: Pt.
 2.  Multipart CD-ROM              ISS
     Captions/Labels: CD.
 3.  INDEXES                       IND
     Captions/Labels: Pt.


3 item(s) in list
Options:
 # item   Add item   Delete item(s)   Sequence TOHs   Move #(s)   Go to
 Limit list   Quit holdings   ? Help   Exit
```

3. Select the *Sequence TOHs* option. The option line changes.

```
            SEQUENCE TOHs                                    MASTER

LCN      :10006223   Call #: AE5.E363 1995                ISSN:
Title    :The new encyclopaedia Britannica
Imprint  :Chicago : Encyclopaedia Britannica, c199+       LCCN: 93073891

     Description                     Type  Supplement/Index type
     -----------                     ----  --------------------
 1.  Multi-volume set                ISS
     Captions/Labels: Pt.
 2.  Multipart CD-ROM                ISS
     Captions/Labels: CD.
 3.  INDEXES                         IND
     Captions/Labels: Pt.



3 item(s) in list
Options: 2
 # line(s) to move    Quit holdings   ? Help   Exit
```

4. Enter the line number of the Type of Holding record you want to
    move. The system prompts you for an insertion point.

```
            SEQUENCE TOHs                                    MASTER

LCN      :10006223   Call #: AE5.E363 1995                ISSN:
Title    :The new encyclopaedia Britannica
Imprint  :Chicago : Encyclopaedia Britannica, c199+       LCCN: 93073891

     Description                     Type  Supplement/Index type
     -----------                     ----  --------------------
 1.  Multi-volume set                ISS
     Captions/Labels: Pt.
 2.  Multipart CD-ROM                ISS
     Captions/Labels: CD.
 3.  INDEXES                         IND
     Captions/Labels: Pt.



3 item(s) in list
Options: 1
 Drop at line #    Quit holdings   ? Help   Exit
```

5. Enter the line number where you want to move the record to. The record is inserted above the line you specify. For example, if you drop the record at line 3, the moved line appears above line 3. (In a short list of records, re-organizing the list can produce confusing results. For example if you want to move line 2 to the bottom of the list, you must ask the system to drop the record at line 4 which does not appear. The system inserts the record above line 4 in position 3, at the bottom of the list.)

```
              SEQUENCE TOHs                               MASTER

LCN      :10006223   Call #: AE5.E363 1995            ISSN:
Title    :The new encyclopaedia Britannica
Imprint  :Chicago : Encyclopaedia Britannica, c199+      LCCN: 93073891

     Description                   Type  Supplement/Index type
     -----------                   ----  --------------------
 1.  Multipart CD-ROM              ISS
     Captions/Labels: CD.
 2.  Multi-volume set              ISS
     Captions/Labels: Pt.
 3.  INDEXES                       IND
     Captions/Labels: Pt.




3 item(s) in list
Options:
 # line(s) to move     File   Quit holdings   ? Help   Exit
```

6. The new sequence displays. *File*. This display will be reflected on the OPAC display and on the Level 5 display in the Online Catalogue.

```
                       Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10006223
LCCN           :93073891
AUTHOR         :Encyclopaedia Britannica, inc.
TITLE          :The new encyclopaedia Britannica
Pub/Size       :Encyclopaedia Britannica, 29 cm.

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.   ADVLIB Central GENERAL
      Multipart CD-ROM: CD.1
      Multi-volume set: Pt.A-Pt.D
      INDEXES: Pt. 1




1 item(s) in list.
Options:
 Full display   # item   Exit
```

The CD-ROM copies of the title now display before the paper copies.

Creating and Using Placeholders

Placeholders can be used to circulate library items that do not have their own barcode/piece record, such as:

- interlibrary loans

- manual loans

- non-circulating material

- vertical file material

- unbound periodical, that is issues which you want to circulate but will not be barcoded separately (will be bound later).

- Placeholders are also used in the Fast Add function.

Set Up for Single-parts Placeholder barcodes are created from the PIECES DETAIL screen.

Set Up for Multiparts To create placeholder pieces you must first add a placeholder LOCATION COPY, then attach as many pieces to the location copy as you think you will need. If you have multiple subscriptions to a periodical, create a placeholder location copy for each of the subscriptions.

Searching For Placeholder Barcodes Placeholder locations and pieces do not display in the Online Catalogue. These placeholder records do appear on the PIECES SUMMARY screen.

N Barcodes If you do not enter a barcode number in the *Barcode* field on the PIECES DETAIL screen and you file the record, the system assigns a N-barcode.

Checking Out Placeholders The SERIAL IDENTIFIER prompt appears when you check out an item that has a placeholder barcode attached to it. The Serial Identifier is a temporary title that appears in the patrons list of items checked out and on notices. You cannot search for serial identifiers from the Online Catalogue.

Creating Placeholders for a Multipart/Serial Title

Create a location copy record for the placeholder location, then add new pieces and attach them to the placeholder Location Copy record.

The *volume/part#* field displays the text <PLACEHOLDER ONLY>. You can not update this field when this message displays. You cannot change

the contents of this field as long as the piece is attached to a placeholder only location.

```
                     Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10003651
LCCN           :85080367
AUTHOR         :Encyclopædia Britannica, inc.
TITLE          :The New Encyclopaedia Britannica
Pub/Size       :Encyclopaedia Britannica, 29 cm.

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.  ADVLIB Central GENERAL c.2
 2.  ADVLIB Central GENERAL c.3
     Multi-volume set: Pt.A
 3.  MAIN BRA1 GEN1 c.4
     Multi-volume set: Pt.A



3 item(s) in list.
Options:
 # item   Prior screen   Holdings edit   Extend search   Full display
 Limit list   Output   MARC   Order display   Review search   OPAC parms
 New search   Reset   ? Help
```

1. From the search screen select *Holdings edit.* The option line changes.

```
                     Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10003651
LCCN           :85080367
AUTHOR         :Encyclopædia Britannica, inc.
TITLE          :The New Encyclopaedia Britannica
Pub/Size       :Encyclopaedia Britannica, 29 cm.

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
 1.  ADVLIB Central GENERAL c.2
 2.  ADVLIB Central GENERAL c.3
     Multi-volume set: Pt.A
 3.  MAIN BRA1 GEN1 c.4
     Multi-volume set: Pt.A



3 item(s) in list.
Options:
 OPAC display   Pieces display   Type of holdings display   Parts display
 Pub. pattern display   Locations display   Serial copy display
 Check-in serials   Bibliographic edit   Order display   Exit
```

2. Select *Locations display*. The LOCATION COPY SUMMARY record
    appears.

```
                  LOCATION COPY SUMMARY                        MASTER

LCN     :10003651   Call #: AE5.E363 1986              ISSN:
Title   :The New Encyclopaedia Britannica
Imprint :Chicago : Encyclopaedia Britannica, c198+       LCCN: 85080367

     Physical Location     Collection/Call number/Copy     Format
     ------------------    --------------------------      ------
 1.  ADVLIB Central        GENERAL c.2                     not defined
 2.  ADVLIB Central        GENERAL c.3                     not defined
 3.  MAIN BRA1             GEN1 c.4                        not defined



3 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

3. Select the *Add item* option. The LOCATION COPY DETAIL screen
    appears.

```
               LOCATION COPY DETAIL                        MASTER

LCN      :10003651   Call #: AE5.E363 1986              ISSN:
Title    :The New Encyclopaedia Britannica
Imprint  :Chicago : Encyclopaedia Britannica, c198+      LCCN: 85080367


** New record **
 1. Institution     : AL=ADVANCE Libra  9. Coded Location    :
 2. Sublocation     : CENTRAL=Central  10. Non-coded Location :
 3. Collection code : GENERAL=General  11. Classification src.:
 4. Call # prefix   :                  12. Shelving Title    :
 5. Call number     :                  13. Copyright fee code :
 6. Call # suffix   :                  14. Materials specified:
 7. Copy number     :                  15. Placeholder only  : Y
 8. Retention policy: 0                16. Physical format   :


Options:
 # line   Line by line   Holdings statement   MARC Holdings
 Binding information   File   Delete   Quit holdings   ? Help   Exit
```

4. Enter Y at the *Placeholder only* field and *File*. The LOCATION COPY
   SUMMARY screen appears.

```
            LOCATION COPY SUMMARY                         MASTER

LCN     :10003651   Call #: AE5.E363 1986              ISSN:
Title   :The New Encyclopaedia Britannica
Imprint :Chicago : Encyclopaedia Britannica, c198+     LCCN: 85080367

      Physical Location     Collection/Call number/Copy     Format
      -----------------     --------------------------      ------
 1.  ADVLIB Central         GENERAL                         not defined
 2.  ADVLIB Central         GENERAL c.2                     not defined
 3.  ADVLIB Central         GENERAL c.3                     not defined
 4.  MAIN BRA1              GEN1 c.4                         not defined


4 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

5. Select the *Go to* option. The option line changes.

```
            LOCATION COPY SUMMARY                         MASTER

LCN     :10003651   Call #: AE5.E363 1986              ISSN:
Title   :The New Encyclopaedia Britannica
Imprint :Chicago : Encyclopaedia Britannica, c198+     LCCN: 85080367

      Physical Location     Collection/Call number/Copy     Format
      -----------------     --------------------------      ------
 1.  ADVLIB Central         GENERAL                         not defined
 2.  ADVLIB Central         GENERAL c.2                     not defined
 3.  ADVLIB Central         GENERAL c.3                     not defined
 4.  MAIN BRA1              GEN1 c.4                         not defined

 4 item(s) in list.
Options:
 OPAC display   Pieces display   Type of holdings display   Parts display
 Pub. pattern display   Locations display   Serial copy display
 Check-in serials   Bibliographic edit   Order display   Exit
```

6. Select the *Pieces display* option. The PIECES SUMMARY screen
   appears.

```
                 PIECES SUMMARY                              MASTER

LCN      :10003651   Call #: AE5.E363 1986              ISSN:
Title    :The New Encyclopaedia Britannica
Imprint  :Chicago : Encyclopaedia Britannica, c198+     LCCN: 85080367

      Pieces key        Location Information  Current Status   Numbering    Notes
      ----------        --------------------  --------------   ---------    -----




0 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

7. Select the *Add item* option. The PIECES DETAIL screen appears.

```
                Online Catalogue PIECES DETAIL - MULTIPART
Local Control #:  10003651                          Format  : BK
Status      : Not Available
Title       : The New Encyclopaedia Britannica
Author      : Encyclopædia Britannica, inc.
Updated By :                   Patron  :            Last out:
Update Date:                   Due Date:            Created :
Inventory  :                   Due Time:            Circ Cnt: 0 (0)
** New record **
 1. Barcode    :
 2. Current Locn  :
 3. Owning Locn  : AL CENTRAL GENERAL
 4. Volume/Part# :
 5. Bound Label  :
 6. Pend.Action  :                    11. Physical Cond.:
 7. Circ. Code   : LCGEN=GENERAL COLLE 12. Accession #  :
 8. Statistics   :                        Current PO#   :
 9. Actual Cost  :
10. Public note 1:




Enter the barcode for this PIECE
```

8. Enter a barcode. Select the *Current Locn* field and enter `??`. The
    LOCATION COPY SUMMARY screen appears.

```
            LOCATION COPY SUMMARY                        MASTER

LCN     :10003651   Call #: AE5.E363 1986              ISSN:
Title   :The New Encyclopaedia Britannica
Imprint :Chicago : Encyclopaedia Britannica, c198+     LCCN: 85080367

     Physical Location    Collection/Call number/Copy   Format
     -----------------    --------------------------    ------
 1.  ADVLIB Central       GENERAL                       not defined
 2.  ADVLIB Central       GENERAL c.2                   not defined
 3.  ADVLIB Central       GENERAL c.3                   not defined
 4.  MAIN BRA1            GEN1 c.4                      not defined


4 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

9. Use the *Retrieve #* option to select the placeholder Location Copy record.

```
            LOCATION COPY SUMMARY                        MASTER

LCN     :10003655   Call #: AE5.E363 1987              ISSN:
Title   :The New Encyclopaedia Britannica
Imprint :Chicago : Encyclopaedia Britannica, c198+     LCCN: 85082101 //r8

     Physical Location    Collection/Call number/Copy   Format
     -----------------    --------------------------    ------
 1.  ADVLIB Central       GENERAL                       not defined




1 item(s) in list.
You are attempting to link this piece to a placeholder only location.
Okay to continue?
```

10. When you select a location, the system prompts:

```
You are attempting to link this piece to a placeholder
only location. Okay to continue?
```

Enter Y. The PIECES DETAIL screen appears.

```
                  Online Catalogue PIECES DETAIL - MULTIPART
Local Control #:  10003651                            Format  : BK
Status     : In Library
Title      : The New Encyclopaedia Britannica
Author     : Encyclopædia Britannica, inc.
Updated By :               Patron  :              Last out:
Update Date:               Due Date:              Created :
Inventory  :               Due Time:              Circ Cnt: 0 (0)
** New record **
 1. Barcode      : 39999000566
 2. Current Locn : AL CENTRAL GENERAL
 3. Owning Locn  : AL CENTRAL GENERAL
 4. Volume/Part# : <PLACEHOLDER ONLY>
 5. Bound Label  :
 6. Pend.Action  :                  11. Physical Cond.:
 7. Circ. Code   : LCGEN=GENERAL COLLE 12. Accession #   :
 8. Statistics   :                      Current PO#   :
 9. Actual Cost  :                      Serial Ident. :
10. Public note 1:

Options:
 # line   Line by line   Notes display   File   Print   Quit holdings
 ? Help   Exit
```

11. The *Volume/Part#* field displays the message <PLACEHOLDER ONLY>. (You cannot select this field once this message appears.) Complete the screen and *File*. The system prompts:

    Update owning info from current info (Y/N) ? :

    The PIECES SUMMARY screen appears. The barcode can now be used as a placeholder.

Changing a Multipart/Serial Placeholder from Y to N

To change the barcodes on multipart titles from placeholders to non-placeholder barcodes:

• create a new Location Copy record that is not a placeholder

• change the current location of the placeholder barcoded pieces to the new location by changing the *Current Locn* field on the PIECES DETAIL screen

• link the non-placeholder barcodes to the parts

• delete the placeholder barcodes if they are no longer required.

Task Details

```
                      Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10003938
LCCN            :86082929
AUTHOR          :Encyclopaedia Britannica, inc.
TITLE           :The New Encyclopædia Britannica
Pub/Size        :Encyclopædia Britannica, 29 cm.

HELD AT THE FOLLOWING LOCATIONS, CHOOSE ONE FOR MORE DETAIL




0 item(s) in list.
Options:
 # item   Prior screen   Holdings edit   Extend search   Full display
 Limit list   Output   MARC   Order display   Review search   OPAC parms
 New search   Reset   ? Help
```

1. From the search screen select *Holding Edit*. The option line changes.
   (Placeholders do not display in the Online Catalogue.)

```
                      Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10003938
LCCN            :86082929
AUTHOR          :Encyclopaedia Britannica, inc.
TITLE           :The New Encyclopædia Britannica
Pub/Size        :Encyclopædia Britannica, 29 cm.

HELD AT THE FOLLOWING LOCATIONS, CHOOSE ONE FOR MORE DETAIL




0 item(s) in list.
Options:
 OPAC display   Pieces display   Type of holdings display   Parts display
 Pub. pattern display   Locations display   Serial copy display
 Check-in serials   Bibliographic edit   Order display   Exit
```

2. Select *Locations display.* The LOCATION COPY SUMMARY screen appears.

```
              LOCATION COPY SUMMARY                         MASTER

LCN      :10003938   Call #: AE5.E363 1988            ISSN:
Title    :The New Encyclopædia Britannica
Imprint  :Chicago : Encyclopædia Britannica, c1988+       LCCN: 86082929

      Physical Location     Collection/Call number/Copy      Format
      ------------------    --------------------------      ------
  1.  ADVLIB Central        GENERAL                          not defined




1 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

3. Select the *Add item* option. The LOCATION COPY DETAIL screen appears.

```
              LOCATION COPY DETAIL                          MASTER

LCN      :10003938   Call #: AE5.E363 1988            ISSN:
Title    :The New Encyclopædia Britannica
Imprint  :Chicago : Encyclopædia Britannica, c1988+       LCCN: 86082929


** New record **
 1. Institution    : AL=ADVANCE Libra  9. Coded Location    :
 2. Sublocation    : CENTRAL=Central  10. Non-coded Location :
 3. Collection code : GENERAL=General  11. Classification src.:
 4. Call # prefix   :                 12. Shelving Title    :
 5. Call number     :                 13. Copyright fee code :
 6. Call # suffix   :                 14. Materials specified:
 7. Copy number     :                 15. Placeholder only   : N
 8. Retention policy: 0               16. Physical format   :




Options:
 # line   Line by line   Holdings statement   MARC Holdings
 Binding information   File   Delete   Quit holdings   ? Help   Exit
```

4. Create a new Location Copy record. At the *Placeholder only* field enter N. File. The LOCATION COPY SUMMARY screen appears.

```
              LOCATION COPY SUMMARY                        MASTER

LCN     :10003938   Call #: AE5.E363 1988             ISSN:
Title   :The New Encyclopædia Britannica
Imprint :Chicago : Encyclopædia Britannica, c1988+    LCCN: 86082929

     Physical Location    Collection/Call number/Copy    Format
     -----------------    --------------------------     ------
 1.  ADVLIB Central       GENERAL                        not defined
 2.  ADVLIB Central       GENERAL                        not defined




2 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

5. Select *Go to*. The option line changes.

```
              LOCATION COPY SUMMARY                        MASTER

LCN     :10003938   Call #: AE5.E363 1988             ISSN:
Title   :The New Encyclopædia Britannica
Imprint :Chicago : Encyclopædia Britannica, c1988+    LCCN: 86082929

     Physical Location    Collection/Call number/Copy    Format
     -----------------    --------------------------     ------
 1.  ADVLIB Central       GENERAL                        not defined
 2.  ADVLIB Central       GENERAL                        not defined




2 item(s) in list.
Options:
 OPAC display   Pieces display   Type of holdings display   Parts display
 Pub. pattern display   Locations display   Serial copy display
 Check-in serials   Bibliographic edit   Order display   Exit
```

6. Select *Pieces display*. The PIECES SUMMARY screen appears.

```
                   PIECES SUMMARY                               MASTER

LCN    :10003938   Call #: AE5.E363 1988               ISSN:
Title  :The New Encyclopædia Britannica
Imprint :Chicago : Encyclopædia Britannica, c1988+        LCCN: 86082929

      Pieces key       Location Information  Current Status   Numbering   Notes
      ----------       -------------------   --------------   ---------   -----
 1.  39999000677      ADVLIB Central        DUE: 04/21/98                 N
                      GENERAL



1 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

7. Select the piece record that is attached to a placeholder barcode. The PIECES DETAIL screen appears.

```
                Online Catalogue PIECES DETAIL – MULTIPART
Local Control #:  10003938                            Format  : BK
Status     : Checked Out
Title      : The New Encyclopædia Britannica
Author     : Encyclopaedia Britannica, inc.
Updated By :                     Patron  : Patron, Mary    Last out: 04/21/98
Update Date: 04/21/98  09:32am Due Date: 04/21/98        Created : 04/21/98
Inventory  :                    Due Time: 05:29pm         Circ Cnt: 3 (3)

 1. Barcode     : 39999000677
 2. Current Locn : AL CENTRAL GENERAL
 3. Owning Locn  : AL CENTRAL GENERAL
 4. Volume/Part# : <PLACEHOLDER ONLY>
 5. Bound Label  :
 6. Pend.Action  :                      11. Physical Cond.:
 7. Circ. Code   : LCGEN=GENERAL COLLE 12. Accession #   :
 8. Statistics   :                      Current PO#   :
 9. Actual Cost  :                      Serial Ident. : Britannica A
10. Public note 1:

Options:
 # line   Line by line   Notes display   File   Delete   Binding entry
 Circ usage   Status   Print   Card print   Additional parameters
 Quit holdings   ? Help   Exit
```

8. Select the *Current Locn* field and enter C to change. The LOCATION COPY SUMMARY screen appears. The double asterisks (**) indicates which Location Copy record is current attached to this piece.

```
               LOCATION COPY SUMMARY                      MASTER

 LCN     :10003938   Call #: AE5.E363 1988              ISSN:
 Title   :The New Encyclopædia Britannica
 Imprint :Chicago : Encyclopædia Britannica, c1988+     LCCN: 86082929

      Physical Location     Collection/Call number/Copy     Format
      ------------------    --------------------------      ------
  1** ADVLIB Central        GENERAL                         not defined
  2.  ADVLIB Central        GENERAL                         not defined




 2 item(s) in list.
 Options:
  Retrieve #   # item   Add item   Limit list   Quit holdings   ? Help
  Exit
```

9. Use the *Retrieve #* option to select a non-placeholder Location Copy record.

```
                    LOCATION COPY SUMMARY                      MASTER

LCN      :10003938   Call #: AE5.E363 1988            ISSN:
Title    :The New Encyclopædia Britannica
Imprint  :Chicago : Encyclopædia Britannica, c1988+   LCCN: 86082929

      Physical Location    Collection/Call number/Copy    Format
      -----------------    --------------------------     ------
 1**  ADVLIB Central       GENERAL                        not defined
 2.   ADVLIB Central       GENERAL                        not defined




2 item(s) in list.
You are attempting to link this piece to a non-placeholder only location.
Okay to continue? Y
```

10. The system prompts to continue. Type Y to change the piece from a
    placeholder barcode to a non-placeholder barcode. The PIECES
    DETAIL screen appears.

```
              Online Catalogue PIECES DETAIL - MULTIPART
Local Control #:  10003938                         Format  : BK
Status    : Checked Out
Title     : The New Encyclopædia Britannica
Author    : Encyclopaedia Britannica, inc.
Updated By :                 Patron  : Patron, Mary   Last out: 04/21/98
Update Date: 04/21/98  09:32am Due Date: 04/21/98       Created : 04/21/98
Inventory :                 Due Time: 05:29pm       Circ Cnt: 3 (3)

 1. Barcode      : 39999000677
 2. Current Locn : AL CENTRAL GENERAL
 3. Owning Locn  : AL CENTRAL GENERAL
 4. Volume/Part# :
 5. Bound Label  :
 6. Pend.Action  :                    11. Physical Cond.:
 7. Circ. Code   : LCGEN=GENERAL COLLE 12. Accession #   :
 8. Statistics   :                        Current PO#   :
 9. Actual Cost  :
10. Public note 1:

Options:
 # line   Line by line   Notes display   File   Delete   Binding entry
 Circ usage   Status   Print   Card print   Additional parameters
 Quit holdings   ? Help   Exit
```

11. The new location appears in the *Current Locn* field. Placeholder and the <PLACEHOLDER ONLY> display have been removed from the *Volume/Part#* field because the piece is now attached to a non-place-holder location copy. The system will not allow you to *File* until this field has been linked to a part. If you attempt to *File*, ADVANCE displays the message: The piece must have parts linked to it.

```
               Online Catalogue PIECES DETAIL - MULTIPART
Local Control #:  10003938                           Format  : BK
Status     : Checked Out
Title      : The New Encyclopædia Britannica
Author     : Encyclopaedia Britannica, inc.
Updated By :                   Patron  : Patron, Mary   Last out: 04/21/98
Update Date: 04/21/98  09:32am Due Date: 04/21/98       Created : 04/21/98
Inventory  :                   Due Time: 05:29pm        Circ Cnt: 3 (3)

 1. Barcode     : 39999000677
 2. Current Locn : AL CENTRAL GENERAL
 3. Owning Locn  : AL CENTRAL GENERAL
 4. Volume/Part# : ??
 5. Bound Label  :
 6. Pend.Action  :                    11. Physical Cond.:
 7. Circ. Code   : LCGEN=GENERAL COLLE 12. Accession #   :
 8. Statistics   :                        Current PO#   :
 9. Actual Cost  :
10. Public note 1:



Enter ?? to browse the linked parts
```

12. Select the *Volume/Part#* field and enter ?? to link this barcode to a piece. The LINKED PARTS screen appears.

```
          LINKED PARTS                                    MASTER

LCN      :10003938   Call #: AE5.E363 1988            ISSN:
Title    :The New Encyclopædia Britannica
Imprint  :Chicago : Encyclopædia Britannica, c1988+    LCCN: 86082929

     Part Number          Type of Holding
     -----------          ---------------



0 item(s) in list
Options:
 Link   Unlink item(s)   Accept   Limit list   Quit holdings   ? Help
 Exit
```

13. Select *Link*. The LINK PARTS TO PIECE screen appears.

```
               LINK PARTS TO PIECE                          MASTER

LCN      :10003938   Call #: AE5.E363 1988              ISSN:
Title    :The New Encyclopædia Britannica
Imprint  :Chicago : Encyclopædia Britannica, c1988+      LCCN: 86082929

      Part number        Type               Status        Barcoded  Link?
      -----------        ----               ------        --------  -----
 1.  Vol.A              Multivolume Set     Received       N         N




1 item(s) in list
Options:
 Retrieve item(s)   # item   Insert at line #   Mark item(s)   Limit list
 Quit holdings   ? Help   Exit
```

14. Use the *Retrieve item(s)* option to select the items that you want to link to the non-placeholder barcode. The LINKED PARTS screen appears.

```
               LINKED PARTS                                 MASTER

LCN      :10003938   Call #: AE5.E363 1988              ISSN:
Title    :The New Encyclopædia Britannica
Imprint  :Chicago : Encyclopædia Britannica, c1988+      LCCN: 86082929

      Part Number          Type of Holding
      -----------          ---------------
 1.  Vol.A                 Multivolume Set - ISS




1 item(s) in list
Options:
 # item   Link   Unlink item(s)   Accept   Limit list   Quit holdings
 ? Help   Exit
```

15. Select *Accept*. The PIECES DETAIL screen appears. The linked item appears in the *Volume/Part#* field.

```
                    Online Catalogue PIECES DETAIL - MULTIPART
 Local Control #:  10003938                            Format  : BK
 Status      : Checked Out
 Title       : The New Encyclopædia Britannica
 Author      : Encyclopaedia Britannica, inc.
 Updated By :                  Patron  : Patron, Mary    Last out: 04/21/98
 Update Date: 04/21/98  09:32am Due Date: 04/21/98       Created : 04/21/98
 Inventory  :                  Due Time: 05:29pm         Circ Cnt: 3 (3)

  1. Barcode      : 39999000677
  2. Current Locn : AL CENTRAL GENERAL
  3. Owning Locn  : AL CENTRAL GENERAL
  4. Volume/Part# : Vol.A
  5. Bound Label  :
  6. Pend.Action  :                      11. Physical Cond.:
  7. Circ. Code   : LCGEN=GENERAL COLLE 12. Accession #   :
  8. Statistics   :                          Current PO#   :
  9. Actual Cost  :
 10. Public note 1:

 Options:
  # line   Line by line   Notes display   File   Delete   Binding entry
  Circ usage   Status   Print   Card print   Additional parameters
  Quit holdings   ? Help   Exit
```

16. Select *File* to return to the PIECES SUMMARY screen.

Delete Unnecessary Placeholders on a Multipart/Serial Title

Unnecessary placeholders can be deleted by deleting the placeholder
location copy record attached to the bibliographic record.

```
                LOCATION COPY SUMMARY                       MASTER

LCN     :10003938   Call #: AE5.E363 1988              ISSN:
Title   :The New Encyclopædia Britannica
Imprint :Chicago : Encyclopædia Britannica, c1988+      LCCN: 86082929

     Physical Location    Collection/Call number/Copy      Format
     -----------------    --------------------------       ------
 1.  ADVLIB Central       GENERAL                         not defined
 2.  ADVLIB Central       GENERAL                         not defined




2 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

1. From the LOCATION COPY SUMMARY screen select the placeholder
    record that you want to delete. The LOCATION COPY DETAIL screen
    appears.

```
                LOCATION COPY DETAIL                        MASTER

LCN     :10003938   Call #: AE5.E363 1988              ISSN:
Title   :The New Encyclopædia Britannica
Imprint :Chicago : Encyclopædia Britannica, c1988+      LCCN: 86082929


 LOCCPY key :  10031820
 1. Institution    : AL=ADVANCE Libra  9. Coded Location   :
 2. Sublocation    : CENTRAL=Central  10. Non-coded Location :
 3. Collection code : GENERAL=General  11. Classification src.:
 4. Call # prefix  :                   12. Shelving Title    :
 5. Call number    :                   13. Copyright fee code :
 6. Call # suffix  :                   14. Materials specified:
 7. Copy number    :                   15. Placeholder only  : Y
 8. Retention policy: 0                16. Physical format   :


Options:
 # line   Line by line   Pieces / Parts   Holdings statement
 MARC Holdings   Binding information   File   Delete   Quit holdings
 ? Help   Exit
```

2. Check that the *Placeholder only* field is set to Y. Select *Delete*. The system may warn you that pieces are attached to this Location Copy record.

```
                LOCCPY Deletion Error/Warning Report

      Number of records: 2
      Errors/Warnings encountered for attached PIECES record(s)
      ----------------------------------------------------------------
      Warning: Location copy has pieces/parts attached.
      Warning: Deleting the *LAST* piece from this location.




Okay to delete location copy (Y/N)? y
```

3. Enter Y to delete the Location Copy record. The LOCATION COPY SUMMARY screen appears.

```
                LOCATION COPY SUMMARY                          MASTER

 LCN     :10003938   Call #: AE5.E363 1988          ISSN:
 Title   :The New Encyclopædia Britannica
 Imprint :Chicago : Encyclopædia Britannica, c1988+       LCCN: 86082929

      Physical Location    Collection/Call number/Copy    Format
      -----------------    --------------------------     ------
 1.  ADVLIB Central        GENERAL                        not defined




 1 item(s) in list.
 Options:
  # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
  Quit holdings   ? Help   Exit
```

4. Select *Exit*.

Creating Placeholders for a Single-part Title

Task Summary

1. Search for a bibliographic record, access the BRIEF or FULL DISPLAY screen and select *Holdings edit*.

2. Select the *Pieces display* option.

3. Select the piece you want to change to a placeholder or use the *Add item* option to create a new one.

4. On the PIECES DETAIL screen set the placeholder flag to Y. File the record.

```
                    Online Catalogue - BRIEF DISPLAY       (1 of 1 titles)
Local Control # :10003333
LCCN            :84015406 //r953
AUTHOR          :Genaway, David C., 1937-
TITLE           :Integrated online library systems : principles, planning, and
                 implementation
Pub/Size        :Knowledge Industry Publications, 29 cm.

CURRENT LOCATION & COPIES HELD:
     Location           Collection     Call Number/Copy #      Status / Due
     --------           ----------     ------------------      -----------
 1.  ADVLIB Central     GEN-STAFF      c.3                     In Processing
 2.  ADVLIB Central     GENERAL        c.2                     DUE: 02/26/98
                                                               23:30




2 item(s) in list.
Options:
 # item   Prior screen   Holdings edit   Extend search   Full display
 Limit list   Output   MARC   Order display   Review search   OPAC parms
 New search   Reset   ? Help
```

Task

1. From the Search screen, select *Holdings Edit*. The option line changes.

```
                      Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10003333
LCCN           :84015406 //r953
AUTHOR         :Genaway, David C., 1937-
TITLE          :Integrated online library systems : principles, planning, and
                implementation
Pub/Size       :Knowledge Industry Publications, 29 cm.

CURRENT LOCATION & COPIES HELD:
     Location          Collection      Call Number/Copy #      Status / Due
     --------          ----------      ------------------      ------------
 1. ADVLIB Central     GEN-STAFF       c.3                     In Processing
 2. ADVLIB Central     GENERAL         c.2                     DUE: 02/26/98
                                                               23:30



2 item(s) in list.
Options:
 OPAC display   Pieces display   Locations display   Bibliographic edit
 Order display   Exit
```

2.   Select *Pieces display.* The PIECES SUMMARY screen appears.

```
            PIECES SUMMARY                                      USER1

LCN     :10003333  Call #: Z678.9.G45 1984            ISSN:
Title   :Integrated online library systems : principles, planning, and impl+
Imprint :White Plains, NY : Knowledge Industry Pu+       LCCN: 84015406 //r9

     Pieces key      Location Information  Current Status   Numbering   Notes
     ----------      -------------------- --------------   ---------   -----
 1.  00017762859     ADVLIB Central       In Processing                N
                     GEN-STAFF c.3
 2.  00035778843     ADVLIB Central       DUE: 02/26/98                N
                     GENERAL c.2
     Staff notes: Send for deacidification Lot 651 / Rebind after
     deacidification / deacidify / 19970502 / DLC / bind / 19970804 / DLC



2 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Multipart/serial   Go to
 Limit list   Quit holdings   ? Help   Exit
```

3. Select *# item*. (If more than one barcode displays, choose the barcode that you want to change to a placeholder.) If you want to create an entirely new placeholder select the *Add item* option and complete the PIECES DETAIL screen.

```
              Online Catalogue PIECES DETAIL - SINGLE-PART
Local Control #:  10003333                          Format  : BK
Status     : In Processing
Title      : Integrated online library systems : principles, planning, and
Author     : Genaway, David C., 1937-
Updated By :                  Patron  :              Last out:
Update Date: 01/22/98  01:49pm Due Date:             Created : 01/09/98
Inventory  :                  Due Time:             Circ Cnt: 0 (0)

 1. Barcode      : 00017762859
 2. Current Locn : AL CENTRAL GEN-ST c.3
 3. Owning Locn  : AL CENTRAL GEN-ST
 4. Pend. Action :                  11. Shelving title  :
 5. Circ. Code   :                  12. Physical Cond.  :
 6. Statistics   :                  13. Class. Source   :
 7. Actual Cost  : 75.00            14. Retention Policy: 0
 8. Accession #  :                  15. Physical Format :
 9. Placeholder  : Y                    Serial Ident.   :
10. Public note 1:

Options:
 # line   Line by line   Notes display   Binding information   File
 Delete   Binding entry   Circ usage   Status   Print   Card print
 Additional parameters   Quit holdings   ? Help   Exit
```

4. Enter Y at the Placeholder field. Notice that the *Current PO* field located under the *Physical Format* field changes to the *Serial Ident.* field. (You cannot edit the *Serial Ident.* field from this screen. The system provides this information if a serial identifier is entered at the Checkout screen when the placeholder is used.) *File*. The PIECES SUMMARY screen appears. This piece will no longer appear on the BRIEF or FULL DISPLAY screen.

Changing a Single-part Placeholder from Y to N

Follow steps 1-3 above and enter N at the *Placeholder* field and *File*. The piece will now appear on the BRIEF or FULL DISPLAY screen.

Fast Add

Fast Add allows you to circulate material that will never be catalogued.

Set Up

To use Fast Add you must:

- create a Fast Add control record (bibliographic) and enter the LCN in the CF #FAST.ADD.REC at TCL.

- create Fast Add codes for the types of materials you will circulate

- create the barcodes that the system will assign to Fast Add items.

Fast Add Codes

Fast Add codes identify any category of material the library does not catalogue but wishes to circulate, such as comic books, keys to meeting rooms, or newspapers. When a Fast Add code is created, a Circulation Code is assigned to it. The Circulation Code defines the loan period for the material.

Fast Add Barcodes

To circulate Fast Add items, you must create placeholder pieces with barcodes that will be used specifically for this purpose. At Checkout, ADVANCE assigns the barcodes sequentially as they are needed. If all of the Fast Add barcodes are assigned, the system displays the message:

```
Insufficient FAST ADD pieces available for checkout
Press Enter to continue .
```

ADVANCE returns you to the Checkout screen.

When Fast Add items are checked in, the Fast Add barcode becomes available and can be re-assigned to another item.

Searching for Fast Add Items

At Checkout, the system prompts you for a Circulation Code, a temporary title and a serial identifier; this temporary data displays in the patron's list of items checked out.

Fast Add items can be retrieved by barcode number. You cannot retrieve Fast Add items by serial identifier or temporary title.

Fast Add items do not display in the Online Catalogue.

Creating Fast Add Codes

The table used to define Fast Add categories is not displayed as a menu item.

```
DD MM 19YY          Geac ADVANCE Library System (X.XX)          DEFAULT  AU
  HH:YY                     ADVANCE LIBRARY
                            MASTER MENU



       1. CAT   Cataloguing           4. ACQ   Acquisitions

       2. CIRC  Circulation           5. SER   Serials Control Menu

       3. OPAC  Online Catalogue      6. UTIL  Utility Menu

                     7. ON    Change User

                     8. OFF   Log Off



     Enter the number of your selection and press <ENTER>
             or  ?  followed by <ENTER> for Help : FAT
```

1. At the MASTER MENU, enter FAT. The Fast Add Type Control Table appears.

   NOTE: If the Fast Add Type Control Table does not appear, you do not have Fast Add installed.

```
                    Fast Add Type Control Table.

     Number of records : 7
     Code     Description of code
     ------   --------------------------------------------------------
  1. COMICS   RESD   COMIC BOOKS
  2. KEYS     RESH   KEYS FOR MEETING ROOMS
  3. MAGS     RESO   MAGS FOR PUB
  4. MAPS     RESH   SHEET MAPS
  5. PBK      RESD   PULP PAPER FICTION
  6. PER      RESD   PERIODICALS FOR AU
  7. VERT     GEN2   VERTICAL FILE MATERIALS




 Options:
  ? Help   Add item   # line   Print   Forward   Backward   Search jump
  Exit
```

2. Select *Add item*. The system prompts for a code name.

```
                    Fast Add Type Control Table.

     Number of records : 7
     Code     Description of code
     ------   --------------------------------------------------------
  1. COMICS   RESD   COMIC BOOKS
  2. KEYS     RESH   KEYS FOR MEETING ROOMS
  3. MAGS     RESO   MAGS FOR PUB
  4. MAPS     RESH   SHEET MAPS
  5. PBK      RESD   PULP PAPER FICTION
  6. PER      RESD   PERIODICALS FOR AU
  7. VERT     GEN2   VERTICAL FILE MATERIALS




  Enter the code you wish to add : NEWS
```

3. Enter a code (up to 6 characters). A new Fast Add Type Control Table appears.

```
                       Fast Add Type Control Table.

       : NEWS                                           *** New Record ***
     ----------------------------------------------------------------------
  1. Circulation Code                            : LCMRR = MAIN READING ROOM
  2. Description                                 : NEWSPAPERS




 Options:
  ? Help   # line   Line by line   Copy   Print   Delete   Exit   File
```

Circulation Code   [Circulation Code]

Enter a valid Circulation Code as defined on the Circulation Codes
(CCC) table on the Loan Periods Menu. The loan period specified for
this Circulation Code is used to circulate this Fast Add material.

Description   [text - up to 26 characters]

4. Enter a description of the Fast Add code and *File* the record. The
Fast Add Type Control Table appears. The new code has been added.

```
                        Fast Add Type Control Table.

       Number of records : 8
       Code    Description of code
       ------  -----------------------------------------------------------
  1. COMICS  RESD  COMIC BOOKS
  2. KEYS    RESH  KEYS FOR MEETING ROOMS
  3. MAGS    RESO  MAGS FOR PUB
  4. MAPS    RESH  SHEET MAPS
  5. NEWS    LCMRR NEWSPAPERS
  6. PBK     RESD  PULP PAPER FICTION
  7. PER     RESD  PERIODICALS FOR AU
  8. VERT    GEN2  VERTICAL FILE MATERIALS



 Options:
  ? Help   Add item   # line   Print   Forward   Backward   Search jump
  Exit
```

Creating Fast Add Barcodes

When the Fast Add system is set up, a Local Control Number is designated that will be used specifically for Fast Add titles. You must use this number to create barcodes for Fast Add. There are no other methods available.

NOTE: Each Sublocation that circulates Fast Add material needs its own Fast Add barcodes.

Task

```
                    RETRIEVE HOLDINGS INFORMATION

    Enter item barcode or search command : LCN=10009893
```
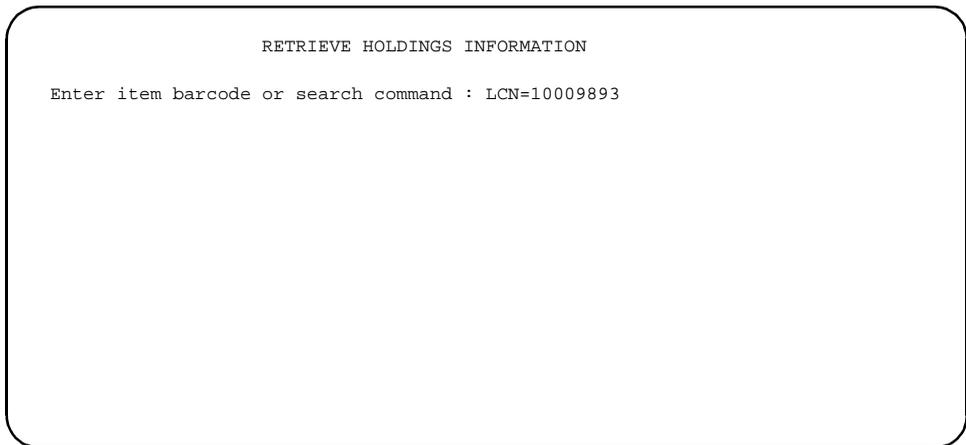
1. From the Edit Holdings search screen (CEHI or CEH), search for Local Control Number that was created for Fast Add pieces. The OPAC search screen appears.

   NOTE: The LCN shown in this example is not a generic Fast Add number. Your ADVANCE system will create a different LCN.

```
                        Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10009893

HELD AT THE FOLLOWING LOCATIONS, CHOOSE ONE FOR MORE DETAIL




0 item(s) in list.
Options:
 # item   Prior screen   Holdings edit   Extend search   Full display
 Limit list   Output   MARC   Holds   Order display   Review search
 OPAC parms   New search   Reset   ? Help
```

2. Select the *Holdings edit* option. The option line changes.

```
                        Online Catalogue - BRIEF DISPLAY      (1 of 1 titles)
Local Control # :10009893

HELD AT THE FOLLOWING LOCATIONS, CHOOSE ONE FOR MORE DETAIL





0 item(s) in list.
Options:
 OPAC display   Pieces display   Locations display   Bibliographic edit
 Order display   Exit
```

3. Select the Pieces display option. The PIECES SUMMARY screen appears.

```
                    Online Catalogue PIECES SUMMARY
Local Control #:  10009893                           Format  : BK
Title    :
Author   :
Publisher :
ISBN/ISSN :
Last update: 07 APR 1998 Master Librarian  (AL)

     Pieces key       Location Information  Current Status    Numbering   Notes
     ----------       --------------------  --------------    ---------   -----
 1.  N10000192        ADVLIB Central        Not Available                 N
                      GENERAL




1 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Multipart/serial   Go to   Limit list
 Quit holdings   ? Help   Exit
```

4. Select the *Add item* option. The PIECES DETAIL screen appears.

```
              Online Catalogue PIECES DETAIL - SINGLE-PART
Local Control #:  10009893                           Format  : BK
Status     : In Library
Title      :
Author     :
Updated By :                    Patron  :              Last out:
Update Date:                    Due Date:              Created :
Inventory  :                    Due Time:              Circ Cnt: 0 (0)
** New record **
 1. Barcode      : 39999171717
 2. Current Locn : AL CENTRAL GENERAL
 3. Owning Locn  : AL CENTRAL GENERAL
 4. Pend. Action :                  11. Shelving title  :
 5. Circ. Code   : LCGEN=GENERAL COLLE 12. Physical Cond.  :
 6. Statistics   :                  13. Class. Source   :
 7. Actual Cost  :                  14. Retention Policy: 8
 8. Accession #  :                  15. Physical Format :
 9. Placeholder  : Y                    Serial Ident.   :
10. Public note 1:

Options:
 # line   Line by line   Notes display   Binding information   File   Print
 Quit holdings   ? Help   Exit
```

5. Enter a barcode and edit any other fields as needed. You cannot change the *Placeholder* field. ADVANCE recognizes this record as a Fast Add item which can only be a placeholder.

    NOTE: If you do not specify a barcode number at the *Barcode* field on the PIECES DETAIL screen and you file the record, the system creates a N-barcode.

```
                Online Catalogue PIECES DETAIL - SINGLE-PART
   Local Control #:  10009893                          Format  : BK
   Status    : In Library
   Title     :
   Author    :
   Updated By :                 Patron  :              Last out:
   Update Date:                 Due Date:              Created :
   Inventory :                  Due Time:              Circ Cnt: 0 (0)
   ** New record **
    1. Barcode      : 39999171717
    2. Current Locn : AL CENTRAL GENERAL
    3. Owning Locn  : AL CENTRAL GENERAL
    4. Pend. Action :                11. Shelving title  :
    5. Circ. Code   : LCGEN=GENERAL COLLE 12. Physical Cond.  :
    6. Statistics   :                13. Class. Source   :
    7. Actual Cost  :                14. Retention Policy: 8
    8. Accession #  :                15. Physical Format :
    9. Placeholder  : Y                  Serial Ident.   :
   10. Public note 1:



 Update owning info from current info (Y/N) ? :  Y
```

6. When you file the record, the system prompts:

    ```
    Update owning info from current info (Y/N) ? :  Y
    ```

    If you answer yes, the system assigns the same institution, subloca-tion and collection information from the current location to the owning location. (The current and owning information will be the same.)

    The PIECES SUMMARY screen appears.

```
                     Online Catalogue PIECES SUMMARY
 Local Control #:  10009893                            Format  : BK
 Title     :
 Author    :
 Publisher :
 ISBN/ISSN :
 Last update: 07 APR 1998 Master Librarian  (AL)

      Pieces key       Location Information  Current Status   Numbering   Notes
      ----------       --------------------  --------------   ---------   -----
  1.  N10000192        ADVLIB Central        Not Available                N
                       GENERAL
  2.  39999171717      ADVLIB Central        Available                    N
                       GENERAL




 2 item(s) in list.
 Options:
  # item   Add item   Delete item(s)   Multipart/serial   Go to   Limit list
  Quit holdings   ? Help   Exit
```

7. The new Fast Add barcoded item appears.

Adding Action and Other Notes to Holdings

Task

Add Note fields to the MARC holdings record.

Select the *MARC Holdings* option on the LOCATION COPY DETAIL screen to edit the holdings record.

583, 84X Note Fields

Note fields contain information about the preservation, use, and form of the bibliographic item. These fields do not have Geac-specific usages.

583	Action Note (R)
841	Holdings Coded Data Values (NR)
842	Textual Physical Form Designator (NR)
843	Reproduction Note (R)
844	Name of Unit(NR)
845	Terms Governing Use and Reproduction Note (R)

Holdings Format Definitions

Before holdings tags can be added to the Holdings record, the tag definitions must exist for the Holdings format. Use Tag and Subfield Edit Checks (BTSE) from the Bibliographic Set-up Menu to add holdings tag definitions. If you attempt to add a tag that is not defined, the system displays the message: Invalid Marc tag for HO format.

Task

1. From the search screen select the *Holdings edit* option. The option line changes.

```
                    Online Catalogue - BRIEF DISPLAY        (1 of 1 titles)
Local Control # :10003333
LCCN            :84015406 //r953
AUTHOR          :Genaway, David C., 1937-
TITLE           :Integrated online library systems : principles, planning, and
                 implementation
Pub/Size        :Knowledge Industry Publications, 29 cm.

CURRENT LOCATION & COPIES HELD:
     Library   Locn          Call Number           Ltype    Status / Due date
     -------   -------   -------------------------  -----    -----------------
 1.  Central   GEN-STA    c.3                       2week    In Processing
 2.  Central   GENERAL    c.2                       INTUSE   DUE: 02/26/98 23:




2 item(s) in list.
Options:
 OPAC display   Pieces display   Locations display   Bibliographic edit
 Order display    Exit
```

2. Select the *Locations display* option. The LOCATION COPY SUMMARY screen appears.

```
                      Online Catalogue LOCATION COPY SUMMARY
  Local Control #:  10003333                              Format  : BK
  Title     : Integrated online library systems : principles, planning, and
  Author    : Genaway, David C., 1937-
  Publisher : Knowledge Industry Publications, 1984
  ISBN/ISSN : 0867290927 :ü$34.50
  Last update: 09 JAN 1998 Super User1 User1  (LC)

       Physical Location     Collection/Call number/Copy      Format
       -----------------     --------------------------       ------
   1.  ADVLIB Central        GEN-STAFF c.3                    not defined
   2.  ADVLIB Central        GENERAL c.2                      not defined



  2 item(s) in list.
  Options:
   # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
   Quit holdings   ? Help   Exit
```

3. Use the *# item* option to select an item. The LOCATION COPY
    DETAIL screen displays.

```
             LOCATION COPY DETAIL                           MASTER

  LCN    :10003333   Call #: Z678.9.G45 1984             ISSN:
  Title  :Integrated online library systems : principles, planning, and impl+
  Imprint :White Plains, NY : Knowledge Industry Pu+        LCCN: 84015406 //r9


   LOCCPY key :  10031556
   1. Institution    : AL=ADVANCE Libra  9. Coded Location    :
   2. Sublocation    : CENTRAL=Central  10. Non-coded Location :
   3. Collection code : GEN-ST=GEN-staff 11. Classification src.:
   4. Call # prefix   :                  12. Shelving Title    :
   5. Call number    :                   13. Copyright fee code :
   6. Call # suffix  :                   14. Materials specified:
   7. Copy number    : 3                 15. Placeholder only   : N
   8. Retention policy: 0                16. Physical format    :


 Options:
   # line   Line by line   Pieces / Parts   MARC Holdings
   Binding information   File   Delete   Quit holdings   ? Help   Exit
```

4. Select MARC holdings. The LOCATION COPY MARC EDIT MARC DISPLAY screen appears.

```
                LOCATION COPY MARC EDIT MARC DISPLAY

      Control # : 10031556     Transaction type : RECON
Last updated    :              Leader           : cxH   2     m
Format type     : Holdings format

008     9801090|||||0   |001|||||0980109
852 BB b AL
      b CENTRAL
      b GEN-ST
      t 3



Options:
 ? Help   # tag   Leader   Overlay workform   Reformat   Restore
 Labelled display   Print   Backward   Forward   Quit holdings   Exit
 Accept   Toggle mode
```

```
                LOCATION COPY MARC EDIT MARC DISPLAY

      Control # : 10031556     Transaction type : RECON
Last updated    :              Leader           : cxH   2     m
Format type     : Holdings format

008     9801090|||||0   |001|||||0980109
583 BB a Microfiche
843 BB a Microfilm.
      b Ottawa.
852 BB b AL
      b CENTRAL
      b GEN-ST
      t 3




Options:
 ? Help   # tag   Leader   Overlay workform   Reformat   Restore
 Labelled display   Print   Backward   Forward   Quit holdings   Exit
 Accept   Toggle mode
```

5. Edit the Holdings format information for the title as you would for any MARC record. Select the *Accept* option. The LOCATION COPY DETAIL screen appears.

Holdings User's Guide   (September 2000)

7

Holdings Screens

This chapter is a reference section for the most commonly used holdings screens. Individual screens and the fields they contain are shown and described for:

- Pieces Records
- Location Copy Records
- Type of Holdings Records
- Publication Pattern Records
- Parts Summary Record
- Parts Detail Record
- Copy Set Summary

Cataloguing Setup   Use the HOLDINGS DISPLAY DEFINITION (HDD) menu to change the information displayed and the column headings for any of the following screens:

- PIECES SUMMARY
- LOCATION COPY SUMMARY
- TYPE OF HOLDING SUMMARY
- PUBLICATION PATTERN SUMMARY
- PARTS SUMMARY
- COPY SET SUMMARY

The HOLDINGS DISPLAY DEFINITION (HDD) menu is available from the HOLDING SETUP MENU (CHSM) in the Cataloguing Module.

Pieces Records

Pieces records include:

- PIECES SUMMARY screen — lists all the barcoded items for the title

- PIECES DETAIL screen — There are two PIECES DETAIL screens: one for single-parts and one for multiparts. These screens provide detailed information about the piece including the barcode, owning and current locations, circulation status, and public note.

Pieces records represent barcoded titles. There is one piece record for each barcoded item. Piece records are equivalent to each unique instance of a subfield p found in the 852/863/864/865 field.

Bound Volumes

Bound volumes are represented by one Piece record for multiple parts/volumes and are bound by linking of parts from the same location.

Access

The PIECES SUMMARY screen is accessible from:

- the *Pieces display* option from within Holdings edit

- the *Go to* option in Holdings edit.

Pieces Summary

```
           PIECES SUMMARY                              MASTER

LCN     :10008609   Call #: UNC                  ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

     Pieces key        Location Information  Current Status   Numbering    Notes
     ----------        -------------------   --------------   ---------    -----
 1.  39999000777       ADVLIB Central        In Processing    Vol.43       N
                       GENERAL c.1                            (Aug-Sep)
 2.  39999000555       ADVLIB Central        In Processing    Vol.44       N
                       GENERAL c.1                            (Oct-Dec)




3 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

Bibliographic Information

The information at the top of the screen is provided by the system and is not user definable.

Screen Content

The screen content is defined on the HOLDINGS DISPLAY DEFINITION (HDD) menu which is available from the HOLDING SETUP MENU (CHSM) in the Cataloguing Module.

Options

 # item   Displays the PIECES DETAIL screen which provides specific piece information for an item.

Add item   Provides a blank PIECES DETAIL screen. Complete the screen to define a new piece.

Delete item(s)	Delete the specified pieces.
Move #(s)	Move pieces to a new bibliographic record or location copy record.
Multipart/serial	Available on the single-part PIECES SUMMARY screen only. Converts single-part holdings to a multipart. Adds a system default Type of Holding record, Part record, and Publication Pattern record to the piece definition.
Go to	Re-displays the option with valid Holdings options for multiparts: *OPAC display, Pieces display, Type of holdings display, Parts display, Pub. pattern display, Locations display, Serial copy display, Check-in serials, Bibliographic edit, Order display, Exit*. For single-parts the options are: *OPAC display, Pieces display, Locations display, Bibliographic edit, Order display, Exit*.
Limit list	Allows you to restrict the items displayed to those that contain the search criteria you specify (search criteria must appear on the screen).
Quit holdings	Exit holdings and do not save changes.
? help	Provides library-specified help about the current screen.
Exit	Exits the current screen and returns you to your entry point for the current screen.

Pieces Detail — Single–parts

From the Pieces Detail screen you can:

- edit the pieces record

- link other pieces to this barcode

- change current and/or owning locations

- add public or staff notes

```
              Online Catalogue PIECES DETAIL - SINGLE-PART
Local Control #:  10003333                          Format  : BK
Status     : En Route GEN-ST
Title      : Integrated online library systems : principles, planning, and
Author     : Genaway, David C., 1937-
Updated By :                  Patron  :              Last out:
Update Date: 07/27/98  05:26pm Due Date:             Created : 01/09/98
Inventory  :                  Due Time:             Circ Cnt: 0 (0)

 1. Barcode     : 00017762859
 2. Current Locn : AL CENTRAL GEN-ST c.3
 3. Owning Locn : AL CENTRAL GEN-ST
 4. Pend. Action :              11. Shelving title  :
 5. Circ. Code   :              12. Physical Cond.  :
 6. Statistics   :              13. Class. Source   :
 7. Actual Cost  : 75.00        14. Retention Policy: 0
 8. Accession #  :              15. Physical Format :
 9. Placeholder  : N                Current PO#     : 971000002/0001
10. Public note 1:

Options:
 # line   Line by line   Notes display   Binding information   File
 Delete   Binding entry   Circ usage   Status   Print   Card print
 Additional parameters   Quit holdings   ? Help   Exit
```

Display Fields

Updated by	Supplied by the system. Specifies who made the last update to the piece.
Update Date	Supplied by the system. Specifies the date when the last update was made to the piece.
Inventory	Date last checked by circulation physical inventory.
Patron	Specifies the patron who has the piece checked out.
Due Date	Specifies the date when the piece is due back in the library.
	Equivalent to the 953 $f.
Due Time	Specifies the time, if applicable, when the piece is due back in the library. (HH:MM:SS)
	Equivalent to the 953 $g.
Last out	Specifies when the piece was last checked out.
Created	Specifies the date when the piece record was created.
Circ Cnt	Indicates the number of times the item has been checked out this year [year to date]. The number in round brackets (all years) indicates the total number of times the item has been checked out in all years.

Edit Fields

1. Barcode	[19 characters]
	Scan or enter a barcode.
	Equivalent to the 852/863/864/865 $p.
2. Current Locn	[Enter C to change the Current Location]
	When C is entered, a window opens.
	Equivalent to the 852 $b (contains the Institution, Sublocation and Collection Codes).

Institution	Required. Enter an Institution Code as defined on the Institution Codes (CHIC) table on the Holding Setup Menu. Enter ?? to browse a list of codes.
Sublocation	Required if the Institution Code requires a Sublocation Code. Enter a Sublocation Code as defined on the Sublocation/Building Codes (CHSC) table on the Holding Setup Menu. Enter ?? to browse a list of codes.
Collection code	Enter a Collection Code as defined on the Collection Codes (CHCC) table on the Holding Setup Menu. Enter ?? to browse a list of codes.
Call number prefix	An additional window opens. The system prompts you to add a call number prefix.
	Enter a Call Number Prefix Code as defined on the Call# Prefix Codes (CHPC) table on the Holding Setup Menu. Enter ?? to browse a list of codes.
	Equivalent to the 852 $k.
Call number	An additional window opens. The system prompts you for the Classification, Cutter/Item, and Shelving Control number.
Call number suffix	Enter a call number suffix.
	Equivalent to the 852 $m.
Copy number	Enter the copy number.
	Equivalent to the 852 $t.
3. Owning Locn	[Various codes, similar to Current Location. Enter C to Change the Current Owning location information.]
	A window opens. The system prompts you for the Institution Code, Sublocation Code, Collection Code, Call number prefix, Call number, and Call number suffix (see descriptions for Current Location).
	Equivalent to the 953 $b (Institution, Sublocation, and Collection Codes), 953 $k (Call number prefix), 953 $m (Call number suffix).
4. Pend. Action	[Action Control Code, or blank]
	If an action needs to take place for this item (e.g. route to or hold for bindery), enter an Action Control Code or ?? to browse a list. Enter 0 to clear the field.

Equivalent to the 953 $t.

5. Circ. Code   [Circulation Code, or blank]

Enter a Circulation Code (for the Current Location) as defined on the Circulation Codes (CCC) table on the Loan Periods Menu or enter ?? to browse a list.

Equivalent to the 953 $w.

6. Statistics   [text, or blank]

Enter any statistics group. (Used for statistics reporting only.)

7. Actual Cost   [numbers only, no symbols such as $., or blank]

Enter the cost of the specific copy. This is the price charged to the patron if the item is lost.

Equivalent to the 953 $c.

8. Accession #   [text, or blank]

Enter the source of the accession number.

9. Placeholder only   [Y/N]

N, unless the piece is to be used as a placeholder barcode. If set to Y, the piece is treated as a placeholder barcode, that is it is used to circulate non-barcoded material. Placeholder barcodes display in Circulation but not in the Online Catalogue.

10. Public note 1   [text, window available, or blank]

If you enter text here, the system assumes that it is your first public note for the piece. To enter more public notes or staff notes, use the Notes display option. Public notes display to patrons if the *Allow OPAC users to see Holdings* display field on the OPAC Control table (OPC) is set to allow holdings display. Or, if the OPAC Holdings Display (OHD), available from the Online Search Setup Menu (OSUP), is set up to display public notes.

Equivalent to the 852 $z subfield.

11. Shelving title	[text, or blank]
	Enter the title that is used to shelve the item.
	Exported in the 852 $l subfield.
12. Physical Cond.	[text, or blank]
	Enter a description of the physical condition of the item.
	Equivalent to the 852 $q subfield.
13. Class. Source	[text]
	Enter the source of the classification or shelving scheme.
	Equivalent to the 852 $2 subfield.
14. Retention Policy	[4 characters in total: 1 character – general retention policy; 3 characters – specific retention policy]
	An additional window opens. Defines the general and specific retention policies for material at this location.

General Policy   Exported in the 008/12 data element.

0	Unknown
1	Other general retention policy.
2	Retained except as replaced by updates.
3	Sample issue retained.
4	Retained until replaced by microform.
5	Retained until replaced by cumulation, replacement volume, or revision.
6	Retained for a limited period.
7	Not retained.
8	Permanently retained. (This is the default for single-parts.)

Specific Policy   Exported in the 008/13-15 data elements. Requires you to define a Type, number of Units and Unit type. For example, `11y` means that the last year of parts is retained.

Type   [l, p, or blank]

l   Latest.

p   Previous.

No. of Units   [1-9, or blank]

Specify the number of parts retained.

Unit Type   [one character code, or blank]

m	month
w	week
y	year(s)
e	edition(s)
i	issues(s)
s	supplement

15. Physical Format   [two letter code, or blank]

The two letter code that defines the physical format, for example, cf (tape cassette), cj (magnetic disk), and so forth.

Physical format is defined in the USMARC 007 field, positions 1 and 2.

Current PO#   Display field only. The purchase order number only appears if the item was ordered through Acquisitions.

Pieces Detail — Multipart

From the Pieces Detail screen you can:

- edit the pieces record

- link other pieces or parts to this barcode

- change current and/or owning locations

- add public or staff notes

```
              Online Catalogue PIECES DETAIL - MULTIPART
Local Control #:  10008609                          Format  : SE
Status    : In Processing
Title     : The Chronicle of higher education
Author    : Editorial Projects for Education, Inc.
Updated By :              Patron  :               Last out:
Update Date: 03/19/98  02:21pm Due Date:          Created : 03/18/98
Inventory  :                 Due Time:            Circ Cnt: 0 (0)

 1. Barcode     : 39999000777
 2. Current Locn : AL CENTRAL GENERAL c.1
 3. Owning Locn  : AL CENTRAL GENERAL
 4. Volume/Part# : Vol.43:No.49(AUG:22:1997)-Vol.44:No.1(SEP:05:1997) Vol.44:N+
 5. Bound Label  : Vol.43 (Aug-Sep)
 6. Pend.Action  :                11. Physical Cond.:
 7. Circ. Code   :                12. Accession #   :
 8. Statistics   :                   Current PO#    :
 9. Actual Cost  :
10. Public note 1:

Options:
 # line   Line by line   Notes display   File   Delete   Binding entry
 Circ usage   Status   Print   Card print   Additional parameters
 Quit holdings   ? Help   Exit
```

Display Fields

Updated by	Supplied by the system. Specifies who made the last update to the piece.
Update Date	Supplied by the system. Specifies the date when the last update was made to the piece.
Inventory	Date last checked by circulation physical inventory.
Patron	Specifies the patron who has the piece checked out.
Due Date	Specifies the date when the piece is due back in the library. Equivalent to the 953 $f.
Due Time	Specifies the time, if applicable, when the piece is due back in the library. (HH:MM:SS) Equivalent to the 953 $g.
Last out	Specifies when the piece was last checked out.
Created	Specifies the date when the piece record was created.
Circ Cnt	Indicates the number of times the item has been checked out this year [year to date]. The number in round brackets (all years) indicates the total number of times the item has been checked out in all years.

Edit Fields

1. Barcode	[19 characters] Scan or enter a barcode. Equivalent to the 852/863/864/865 $p.
2. Current Locn	[C , ??] When C is entered, the LOCATION COPY DETAIL screen appears.

When `??` is entered, the LOCATION COPY SUMMARY screen appears. You can retrieve an existing or create a new location copy from this screen.

Equivalent to the 852 $b (contains the Institution, Sublocation and Collection Codes).

3. Owning Locn

[Enter `C` to change the current owning location information]

A window opens. The system prompts you for the Institution Code, Sublocation Code, Collection Code, Call number prefix, Call number, Call number suffix, and Circulation Code.

Equivalent to the 953 $b (Institution, Sublocation, and Collection Codes), 953 $k (Call number prefix), 953 $m (Call number suffix).

4. Volume/Part#

[Displays summary statement of parts]

This is a linking field, you cannot enter anything other than `??` in this field. The LINKED PARTS screen appears.

This field contains a summary statement describing the parts that are linked to this piece record. Any breaks (between parts) are proceeded by a space; enumeration and chronology levels are separated by a colon, for example, `v.1:iss.1-v.1:iss.5 v.1:iss.7-v.1:iss.12`.

Only those parts already linked to the PIECES record are displayed. If you add parts from the LINKED PARTS screen, when you return to the PIECES DETAIL screen, the system updates the contents of the field with a new summary statement and then proceeds to the next field.

5. Bound Label

[text]

Enter the title of the bound volume, if it is different from the information in the Volume/Part field. A window is available, if necessary.

6. Pend. Action

[Action Control Code, or blank]

If an action needs to take place for this item (e.g. route to or hold for bindery), enter an Action Control Code or `??` to browse a list. Enter `0` to clear the field.

Equivalent to the 953 $t.

7. Circ. Code	[Circulation Code, or blank]
	Enter a Circulation Code (for the Current Location) as defined on the Circulation Codes (CCC) table on the Loan Periods Menu or enter ?? to browse a list.
	Equivalent to the 953 $w.
8. Statistics	[text, or blank]
	Enter any statistics group. (Used for statistics reporting only.)
9. Actual Cost	[numbers only, no symbols such as $., or blank]
	Enter the cost of the specific copy. This is the price charged to the patron if the item is lost.
	Equivalent to the 953 $c.
10. Public note 1	[text, window available, or blank]
	If you enter text here, the system assumes that it is your first public note for the piece. To enter more public notes or staff notes, use the Notes display option. Public notes display to patrons if the *Allow OPAC users to see Holdings* display field on the OPAC Control table (OPC) is set to allow holdings display. Or, if the OPAC Holdings Display (OHD), available from the Online Search Setup Menu (OSUP), is set up to display public notes.
	Equivalent to the 852 $z subfield.
11. Physical Cond.	[text, or blank]
	Enter a description of the physical condition of the item.
	Equivalent to the 852 $q subfield.
12. Accession #	[text, or blank]
	Enter the source of the accession number.

Current PO#	Display field only. The purchase order number only appears if the item was ordered through Acquisitions.

Options – Applies to Single-part and Multipart PIECES DETAIL Screens

# line	Accesses the field specified.
Line by line	Accesses all numbered fields.
Notes display	Displays the PIECES NOTES SUMMARY screen which displays all public and nonpublic notes.
Binding information	Displays the LOCATION COPY BINDING INFORMATION screen which allows you to record information about the binding colour, the number of parts and provides a window in which you can add binding notes.
File	Saves changes to the record and files them into the database.
Delete	Deletes the current piece record.
Binding entry	Displays the BOUND WITH HOLDINGS screen. Displays the volume and title of the part this piece is bound with.
Circ usage	Displays usage by Circulation or in-house use statistics.
Status	Allows you to change the status of the item. The system prompts: `Enter new Item status code`. Use `??` to browse a list of codes. When you enter a code, the system prompts you for confirmation to file the status. Enter `Y` or `N`. To delete the current code, enter `0`. The system replaces the current status with the default status: `Available`.
Print	Prints the screen or the record if a printer is attached to the system.
Card print	Marks this record for shelf card printing.
Additional parameters	Displays the OPAC qualifiers that apply to the item. Also indicates whether the item is in a revolving collection or in the reserve book room.

Quit holdings   Exit holdings and do not save changes.

? Help   Displays library-specific help for the screen.

Exit   Exits the screen without saving changes.

Linked Parts

The LINKED PARTS screen displays all the parts that are currently linked to the current barcode. From this screen you can use the *Unlink* option to remove parts from the piece, or you can use the *Link* option to add more parts to the current barcode.

If no parts are linked to this barcode, no items will appear. Choose the *Link* option to obtain the LINK PARTS TO PIECE screen which displays a list of all parts associated with the title.

Access   This screen is reached by typing ?? at the *Volume/Part#* field on the PIECES DETAIL – MULTIPART screen.

```
              LINKED PARTS                               MASTER

   LCN    :10008609   Call #: UNC                  ISSN: 0009-5982
   Title  :The Chronicle of higher education
   Imprint :[Washington, etc., Chronicle of higher e+    LCCN: sf 80001055

        Part Number          Type of Holding
        -----------          ---------------
    1.  Vol.44:No.15(DEC:12:  Paper - ISS
        1997)
    2.  Vol.44:No.14(DEC:05:  Paper - ISS
        1997)
    3.  Vol.44:No.13(NOV:28:  Paper - ISS
        1997)
    4.  Vol.44:No.12(NOV:21:  Paper - ISS
        1997)
    5.  Vol.44:No.11(NOV:14:  Paper - ISS
        1997)

   8 item(s) in list
   Options:
    # item   Link   Unlink item(s)   Accept   Forward   Limit list
    Quit holdings   ? Help   Exit
```

Bibliographic Information

The information at the top of the screen is provided by the system and is not user definable.

Column Headings

Column headings are defined on the HOLDINGS DISPLAY DEFINITION (HDD) menu which is available from the HOLDING SETUP MENU (CHSM) in the Cataloguing Module.

Content

If no part information appears, there are no parts linked to the piece.

Part Number
System generated. The system obtains this information from definitions made in the *Enumeration* and/or *Chronology* fields on the Publication Pattern Detail screen and the *Enumeration/Chronology* field on the Parts Detail screen.

Type of Holding
System generated. The system obtains this information from definitions made in the *Description* field on the Type of Holding Detail screen.

Options

 # item
Accesses the field specified.

Link
Displays the LINK PART TO PIECE screen. From this screen you can select parts to link to the current barcode.

Unlink item(s)
Remove the link from this part to the current barcode.

Accept
Saves your changes (if any) and exits the screen.

Forward
Browses forward to the next screen of information (if any).

Limit list
Allows you to restrict the items displayed to those that contain the search criteria you specify (search criteria must appear on the screen).

Quit holdings
Exit holdings and do not save changes.

? Help   Displays library-specific help for the screen.

Exit   Exits the screen without saving changes.

Link Parts to Piece

Displays all the parts that are associated with this title and indicates whether the parts are barcoded and linked to the current barcode.

If you select the *Retrieve item(s)* option, the system links the item(s) to the current barcode.

Access   This screen appears when the *Link* option is selected from the LINKED PARTS screen.

```
            LINK PARTS TO PIECE                         MASTER

 LCN     :10008609   Call #: UNC                 ISSN: 0009-5982
 Title   :The Chronicle of higher education
 Imprint :[Washington, etc., Chronicle of higher e+    LCCN: sf 80001055

      Part number      Type              Status        Barcoded  Link?
      -----------      ----              ------        --------  -----
  1.  Vol.44:No.17(JA  Paper             Exp issue     N         N
      N:09:1998)
  2.  Vol.44:No.16(JA  Paper             Bound         Y         N
      N:02:1998)
  3.  Vol.44:No.15(DE  Paper             Bound         Y         Y
      C:12:1997)
  4.  Vol.44:No.14(DE  Paper             Bound         Y         Y
      C:05:1997)
  5.  Vol.44:No.13(NO  Paper             Bound         Y         Y
      V:28:1997)

 18 item(s) in list
 Options:
  Retrieve item(s)   # item   Insert at line #   Mark item(s)   Forward
  Limit list   Quit holdings   ? Help   Exit
```

Bibliographic Information

The information at the top of the screen is provided by the system and is not user definable.

Column Headings

If no part information appears, there are no parts defined for the title.

Part Number
System generated. The system obtains this information from definitions made in the *Enumeration* and/or *Chronology* fields on the Publication Pattern Detail screen and the *Enumeration/Chronology* field on the Parts Detail screen.

Type
The system obtains this information from definitions made *Description* field on the Type of Holding Detail screen.

Status
System generated. Displays the status of this part as it applies to the location of the piece as determined from the *Status* field on the PARTS DETAIL screen.

Barcoded?
[Y or N]

System generated. Indicates whether the part is linked to a piece (not necessarily the current barcode). For example, vol.44:no16(JAN:02:1998) has a status of bound at the piece's location but may not be received yet at another location.

Link?
[Y or N]

System generated. Indicates whether the part is linked to the current barcode. (The barcode on the Pieces Detail screen that you used to access this screen.) Use the *Link* or *Unlink item(s)* option from the Linked Parts screen to change the Y/N toggle.

Options

Retrieve item(s)
Links one or more parts to the current barcode and returns you to the LINKED PARTS screen.

 # item
Accesses the field specified.

Insert at line #
Enter a number to create a new part. If no lines display or you want to insert at the top of the list enter 1. The PARTS DETAIL screen displays. Enter the information for a new part.

Mark item(s)	Select the numbers of the items you want to link, e.g. 1, 3, 13-15. This option allows you to page through multiple screens to mark items for linking to one barcode. When you use this option, the option line changes. Use the *Retrieve* option to return to the LINKED PARTS screen.
Unmark	Any marked items are de-selected. This does not affect any parts that are already linked.
Forward	Browses forward to the next screen of information (if any).
Limit list	Allows you to restrict the items displayed to those that contain the search criteria you specify (search criteria must appear on the screen).
Quit holdings	Exit holdings and do not save changes.
? help	Displays library-specific help for the screen.
Exit	Exits the screen without saving changes.

Location Copy Records

Location Copy screens include:

- LOCATION COPY SUMMARY – provides a list of all the locations where the title can be found.

- LOCATION COPY DETAIL – provides detailed information about a specific location where the title can be found including the physical format, institution, sublocation, collection code, call number and copy number.

There is one Location Copy record for each unique location, physical format and copy held by the library. The record summarizes all the parts/volumes (from multiple types of holdings) held in the location with a common copy designation.

A Location Copy record is equivalent to a separate MARC holdings record and includes textual notes (866/867/868).

Location Copy records describe one copy of a title. If the library has multiple copies of a single-part title, each title has a location copy record. A multi-volume set is defined by one location copy record providing all the parts of the set reside at the same location: for example, if you have two copies of Vol. 2 of a multivolume set, there will be a separate Location Copy record for each. Similarly, copy sets consist of numerous parts but each set is defined by only one location copy record. Titles with only electronic holdings are identified in the system by location copy records and no other records (pieces, type of holding, parts, etc.) because there is no physical volume to represent the title.

It is important to remember the navigational route you use to view holdings because it influences what holdings are displayed. For example, if you select *Holdings edit* and then use the *Locations display* option you see all the locations where the title is held. If you select the *Pieces/Parts* option from the LOCATION COPY DETAIL screen, the holdings displayed are those for that specific location only. To see all parts for the title, use the *Parts display* option from Holdings edit.

Access

The LOCATION COPY SUMMARY screen is accessible from:

- the *Locations display* option from within Holdings edit

- the *Current Location* field on the PIECES DETAIL - MULTIPART screen

- the *Go to* option in Holdings edit

- the Location field on the SERIAL COPY SET DETAIL screen.

Location Copy Summary

```
              LOCATION COPY SUMMARY                        MASTER

LCN      :10008609   Call #: UNC                   ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+    LCCN: sf 80001055

      Physical Location    Collection/Call number/Copy    Format
      -----------------    --------------------------     ------
 1.  ADVLIB Central        GENERAL c.1                    Regular print
 2.  ADVLIB Central        GENERAL c.2                    Regular print
 3.  ADVLIB Central        GENERAL c.3                    Regular print
 4.  ADVLIB Central        GENERAL c.4                    Regular print




4 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

Bibliographic Information

The information at the top of the screen is provided by the system and is not user definable.

Column Headings

Column headings are defined on the HOLDINGS DISPLAY DEFINITION (HDD) menu which is available from the HOLDING SETUP MENU (CHSM) in the Cataloguing Module.

Screen Content

User definable on the HOLDINGS DISPLAY DEFINITION (HDD) menu which is available from the HOLDING SETUP MENU (CHSM) in the Cataloguing Module.

Each numbered line represents one location copy record.

Options

# item	Accesses the field specified.
Add item	Accesses a Detail screen template which allows you to add another Location Copy record.
Delete item(s)	Removes the specified items.
Move #(s)	Allows you to move the location copy and all of its holdings to another bibliographic record.
Go to	Provides access to other Holdings edit screens.
Limit list	Allows you to restrict the items displayed to those that contain the search criteria you specify (search criteria must appear on the screen).
Quit holdings	Exit holdings and do not save changes.
? Help	Displays library-specific help for the screen.
Exit	Exit the screen without saving changes.

Location Copy Detail

The LOCATION COPY DETAIL screen is available by selecting the # *Item* or *Add item* option from the LOCATION COPY SUMMARY screen. This screen is also available from the PIECES DETAIL-MULTIPART or SERIAL COPY SET DETAIL screens by using C to change the current location information.

From this screen you can:

- edit a location copy record

- edit the leader and MARC Holdings information (*MARC holdings* option)

- view the holdings for this location (*Holdings statement* option)

- specify the binding colour, number of parts to bind and binding notes (*Binding information* option).

```
          LOCATION COPY DETAIL                        MASTER

 LCN      :10008609   Call #: UNC                 ISSN: 0009-5982
 Title    :The Chronicle of higher education
 Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055


  LOCCPY key :  10031563
  1. Institution    : AL=ADVANCE Libra  9. Coded Location    :
  2. Sublocation    : CENTRAL=Central  10. Non-coded Location :
  3. Collection code : GENERAL=General  11. Classification src.:
  4. Call # prefix  :                  12. Shelving Title    :
  5. Call number    :                  13. Copyright fee code :
  6. Call # suffix  :                  14. Materials specified:
  7. Copy number    : 1                15. Placeholder only  : N
  8. Retention policy: 0               16. Physical format   : ta

Options:
  # line  Line by line   Pieces / Parts   Holdings statement
  MARC Holdings   Binding information   File   Delete   Quit holdings
  ? Help   Exit
```

Edit Fields

1. Institution

[Institution Code/ 16 characters]

Required. Enter an Institution Code as defined on the Institution Codes (CHIC) table on the Holding Setup Menu. Enter ?? to browse a list of codes.

2. Sublocation

[Sublocation Code/ 16 characters]

Required if the Institution Code requires a Sublocation Code. Enter a Sublocation Code as defined on the Sublocation/Building Codes (CHSC) table on the Holding Setup Menu. Enter ?? to browse a list of codes.

3. Collection Code

[Collection Code/ 16 characters]

Enter a Collection Code as defined on the Collection Codes (CHCC) table on the Holding Setup Menu. Enter ?? to browse a list of codes.

4. Call # prefix	[39 characters per line]
	An additional window opens.
	Enter a Call Number Prefix Code as defined on the Call# Prefix Codes (CHPC) table on the Holding Setup Menu. Enter ?? to browse a list of codes.
5. Call number	[Call number/ 22 characters per line]
	An additional window opens. The system prompts you for the Classification, Cutter/Item, Shelving Control number and the Shelving scheme.
6. Call number suffix	[text, 16 characters]
	Enter a call number suffix.
7. Copy number	[text, 16 characters]
	Enter the copy number.
8. Retention Policy	[4 characters in total: 1 character – general retention policy; 3 characters – specific retention policy]
	An additional window opens. Defines the general and specific retention policies for material at this location.
General Policy	Exported in the 008/12 data element.

0	Unknown
1	Other general retention policy.
2	Retained except as replaced by updates.
3	Sample issue retained.
4	Retained until replaced by microform.
5	Retained until replaced by cumulation, replacement volume, or revision.
6	Retained for a limited period.
7	Not retained.
8	Permanently retained.

Specific Policy   Requires you to define a Type, number of Units and Unit type. For example, `l1y` means that the last year of parts is retained.

Exported in the 008/13-15 data elements.

Type   [l, p, or blank]

l   Latest.

p   Previous.

No. of Units   [1-9, or blank]

Specify the number of parts retained.

Unit Type   [one character code, or blank]

m	month
w	week
y	year(s)
e	edition(s)
i	issues(s)
s	supplement

9. Coded Location   [3 character code, or blank]

An additional window opens. Identifies the specific issues of the title that are kept in this location. It is assumed that this location is not the location where the main holdings are kept.

Requires you to define a Type, number of Units and Unit type. For example, `p2y` means that the previous two years are at this location.

Exported in the 852 $f.

Type   [l, p, or blank]

l   Latest.

p   Previous.

No. of Units   [1-9, or blank]

Unit Type   [one character code, or blank]

m	month
w	week
y	year(s)
e	edition(s)
i	issues(s)
s	supplement

10. Non-coded Location   [text]

Enter a description of the specific units of the title that are held in this location. Only used if you cannot use the Coded Location field to describe the units. Exported in the 852 $g.

11. Classification src.   [text]

Enter the source of the classification or shelving scheme. Exported in the 852 $2.

12. Shelving Title   [text]

Enter the title that is used to shelve the item. Exported in the 852 $l.

13. Copyright fee code   [text]

Enter the copyright article fee code as defined in the 018 field. This field contains the unique identification code for component parts appearing in monographs and serials. For a complete description see the USMARC Bibliographic manual, tag 018. Exported in the 852 $s.

14. Materials specified   [text]

Specifies the parts of the bibliographic item that are held at this location. Exported in 852 $3.

15. Placeholder only	[Y/N]

N, unless the pieces belonging to this location are to be used as place-holder barcodes (that is the pieces are linked to this location). If set to Y, all of the pieces linked to this location are treated as placeholder barcodes, that is they are used to circulate non-barcoded material. Place-holder barcodes display in Circulation but not in the Online Catalogue.

Options

# line	Accesses the field specified.
Line by line	Accesses all numbered fields.
Pieces/parts	Displays the PIECES/PARTS SUMMARY screen. The pieces and loose parts associated with this location copy record are displayed.
Holdings Statement	Displays the TYPE OF HOLDING SUMMARY screen for the current location. Lists the summary holdings statements by Type of Holding (issue, index, supplement) for this location only.
MARC Holdings	Displays LOCATION COPY MARC EDIT DISPLAY screen. From this screen you can edit the leader and MARC Holdings information. Use this screen to enter and maintain electronic holdings information (tag 856).
Binding Information	Displays the LOCATION COPY BINDING INFORMATION screen. Allows you to specify the binding colour, number of parts to bind, and binding notes.

File	Saves changes to the record and files them into the database.
Delete	Deletes the current Location Copy record.
Quit holdings	Exit holdings and do not save changes.
? Help	Displays library-specific help for the screen.
Exit	Exit the screen without saving changes.

Pieces/Parts Summary

Displays all the pieces and non-barcoded parts for a specific title at a specific location. (NOTE: the location can not be determined from this screen but would be identified from the preceding LOCATION COPY DETAIL screen.)

Access

To reach the Pieces/Parts Summary screen select the *Pieces/Parts* option from the LOCATION COPY DETAIL screen.

```
              Online Catalogue PIECES / PARTS SUMMARY

 LCN     :10008609  Call #: UNC                         ISSN: 0009-5982
 Title   :The Chronicle of higher education
 Imprint :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055

     Part number/Bound label       Status              Barcoded
     ----------------------        ------              --------
 1.  Vol.44:No.17(JAN:09:1998)     Exp issue           N
 2.  Vol.43 (Aug-Sep)             In Processing        Y
 3.  Vol.44 Oct.-Dec.             In Processing        Y
 4.  Vol.44:No.7(OCT:17:1997)      Claimed             N
 5.  Vol.44:No.6(OCT:10:1997)      Received            N
 6.  Vol.44:No.5(OCT:03:1997)      Claimed             N
 7.  Vol.44:No.4(SEP:26:1997)      Received            N
 8.  Vol.44:No.3(SEP:19:1997)      Received            N
 9.  Vol.44:No.2(SEP:12:1997)      Received            N



 9 item(s) in list
 Options:
  # item   Delete item(s)   Move #(s)   Limit list   Quit holdings   ? Help
  Exit
```

The information at the top of the screen is provided by the system and is not user definable.

Column Headings

Column headings are defined on the HOLDINGS DISPLAY DEFINITION (HDD) menu which is available from the HOLDING SETUP MENU (CHSM) in the Cataloguing Module.

Options

 # item   Displays the PARTS DETAIL or the PIECES DETAIL screen.

Delete item(s)   Deletes the items specified.

Move #(s)   Allows you to move the selected item(s) to a new location or to a different bibliographic record.

Limit list   Allows you to restrict the items displayed to those that contain the search criteria you specify (search criteria must appear on the screen).

Quit holdings   Exit holdings and do not save changes.

? Help   Displays library-specific help for the screen.

Exit   Exit the screen without saving changes.

Holdings Statement

Summarizes the holdings for this location into Holdings Statements and groups them by type of holding (issues, supplements, or indexes).

```
              TYPE OF HOLDING SUMMARY                    MASTER

LCN     :10008609   Call #: UNC                   ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055

     Description                   Holdings statement
     -----------                   ------------------
 1.  Paper                         Vol.43:No.49(AUG:22:1997)-Vol.44:No.4(SE
                                   P:26:1997),Vol.44:No.6(OCT:10:1997),
                                   Vol.44:No.8(OCT:24:1997)-Vol.44:No.16(JA
                                   N:02:1998)




1 item(s) in list
Options:
 # item   Accept   Limit list   Quit holdings   ? Help   Exit
```

Column Headings

Description   System generated. ADVANCE displays your holdings by the Type of Holding. For example, if this title also had a General Index, Loose Leaf parts, or other types of holdings defined for it, then these categories would display under the Description column and the Holdings Statement for the parts held would display under the Holdings Statement.

Holdings Statement   System generated. The information that appears depends on whether you have chosen to display retrospective holdings notes as well as the system generated statement or whether you choose to override the holdings statement with a note defined on the LOCATION COPY HOLDINGS STATEMENT screen.

Options

item
When you use the *# item* option to select a type of holding the LOCA-TION COPY HOLDINGS STATEMENT screen appears.

Accept
Saves your changes (if any) and exits the screen.

Limit list
Allows you to restrict the items displayed to those that contain the search criteria you specify (search criteria must appear on the screen).

Quit holdings
Exit holdings and do not save changes.

? Help
Displays library-specific help for the screen.

Exit
Exit the screen without saving changes.

Location Copy Holdings Statement

The Location Copy Holdings Statement screen is used to add retrospective holding notes and manual override notes to the holdings statements for the Type of Holding that you selected from the previous screen (TYPE OF HOLDING SUMMARY which you reached by selecting *Holdings Statement* option from the Location Copy Detail screen).

The system generated field represents the holdings statement built by the system and is based on the parts that you currently have at this location.

Display holdings by System Generated default or Customized
You can customize your holdings statement display by adding retrospective and/or manual override statements. These statements can be applied to the holdings with a specific publication pattern or to all the holdings belonging to the same Type of Holding.

You many want to add a note that describes holdings you have that are not represented by parts on your system. This note is known as a Retrospective holdings statement and can be entered on this screen by entering a 0 in the Type field and the text of the note in the Textual Statement field.

You may want to suppress the display of the system generated holdings statement by creating a manual override holdings statement. This textual note displays instead of the system generated holdings statement. It is entered by typing 1 in the TYPE field and the text that you want to

display instead of the system generated statement in the Textual Statement.

```
              LOCATION COPY HOLDINGS STATEMENT             MASTER

LCN     :10008609   Call #: UNC                  ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055


Type of Holding    : Paper              Publication Type: 0 - ISS
Supplement/Index Type:
System Generated: Vol.43:No.49(AUG:22:1997)-Vol.44:No.4(SEP:26:1997),Vol.44:N
                 o.6(OCT:10:1997),Vol.44:No.8(OCT:24:1997)-Vol.44:No.16(JAN:
                 02:1998)


1. Type    :
2. Textual :
   Statement


Publication Pattern Notes : No
Options:
 # line   Line by line   Publication pattern   Accept   Quit holdings
 ? Help   Exit
```

Edit Fields

1.Type   [0, 1 or blank]

                            Enter the type of holding statement.

              0   Retrospective. The information you enter in the *Textual Statement* field
                            is shown prior to the System Generated Statement.

              1   Manual override. No system generated information is shown. The information you enter in the Textual Statement field is shown instead.

          blank   Only system generated information is displayed.

2. Textual Statement   [text - window available]

                            Enter the text that will display in place of the system generated holdings
                            statement if *Type* is set to 1. If Type is set to 0, the text will display
                            before the system holdings.

Options

 # line   Accesses the field specified.

Line by line   Accesses all numbered fields.

Publication Pattern   Allows you to specify either retrospective or manual override holdings
                            statements at the publication pattern level. For example, you can insert a
                            note prior to the holdings for a specific publication pattern or suppress
                            the system generated holdings statement for the holdings belonging to a
                            specific publication pattern.

                            When you select the Publication Pattern option, the PUBLICATION
                            PATTERN SUMMARY screen appears.

```
              PUBLICATION PATTERN SUMMARY                    MASTER

LCN      :10008609   Call #: UNC                     ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

     Enumeration/Chronology    Frequency      Description
     ----------------------    ---------      -----------
 1.  Vol.:No.:(Month):(Day):   Weekly         Paper
     (Year)
     PUBPAT statement: Vol.43:No.49(AUG:22:1997)-Vol.44:No.4(SEP:26:1997),
     Vol.44:No.6(OCT:10:1997),
     Vol.44:No.8(OCT:24:1997)-Vol.44:No.16(JAN:02:1998)




1 item(s) in list
Options:
 Retrieve #   Accept   Limit list   Quit holdings   ? Help   Exit
```

                            Use the *Retrieve #* option to select a pattern. The LOCATION COPY
                            HOLDINGS STATEMENT appears. Use this option if you have multiple
                            publication patterns attached to the same Type of Holding and you want
                            to alter the display of the portion of the holding statement that is built
                            from parts belonging to a specific publication pattern.

Accept   Saves your changes (if any) and exits the screen.

Quit holdings   Exit holdings and do not save changes.

? Help   Displays library-specific help for the screen.

Exit   Exit the screen without saving changes.

MARC Holdings

Displays the MARC Holdings record for the title. The options are the same as for bibliographic MARC editing but the editing applies to the leader and holdings tags only. This option is used to edit electronic holdings (856 tag), action notes, reproduction notes, and so forth.

```
             LOCATION COPY MARC EDIT MARC DISPLAY

      Control # : 10031563    Transaction type : RECON
Last updated     :            Leader           : cyH   2
Format type      : Holdings format

007      ta
008      9801090|||||0  |001|||||0980109
852 BB b AL
      b CENTRAL
      b GENERAL
      t 1


Options:
 ? Help  # tag  Leader  Overlay workform  Reformat  Restore
 Labelled display  Print  Backward  Forward  Quit holdings  Exit
 Accept  Toggle mode
```

Options

? Help   Provides access to a Library-defined help screen.

 # tag   Entering a tag number on this option places the cursor in the record on the specified tag.

Leader	Used to display/edit the leader information in Bibliographic and Authority Cataloguing.
Overlay Workform	This option is available in both authority and bibliographic cataloguing. The system prompts the user for the type of overlay and the workform name to be used.
Reformat	This option performs validity checking on the record and displays any errors encountered. It is recommended to be used prior to the file command to facilitate the workflow.
Restore	Restore the record exactly as it was at retrieval (losing any changes that were made before the restore command was used.)
Labelled Display	This option replaces tag numbers with abbreviated mnemonics as defined by setup for each tag.
Print	This prints the MARC record to a system or terminal printer.
Backward	Displays the previous screen in a multi-screen record.
Forward	Displays the next screen in a multi-screen record.
Quit holdings	Exit holdings and do not save changes.
Exit	Exit the screen without saving changes.
Accept	Save any changes and exit.
Toggle mode	Toggles the record display between the non-MARC descriptions (defined for each tag) and the numeric MARC tags. This option appears only when you are editing records in a database defined for non-MARC cataloguing.

Binding Information

Permits the library to maintain binding information such as binding colour, number of parts, and binding notes.

Access   To reach this screen select the *Binding information* option from the LOCATION COPY DETAIL or the PIECES DETAIL - SINGLEPARTS screens.

```
            LOCATION COPY BINDING INFORMATION           MASTER

LCN     :10008609   Call #: UNC                 ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055



1. Binding Colour : Blue
2. Number of Parts:    6
3. Binding Notes  : Once bound, place on reference shelf.

Options:
 # line   Line by line   Accept   Quit holdings   ? Help   Exit
```

Edit Fields

1. Binding Colour   [25 characters]

                          Enter a text description of the colour.

2. Number of Parts   [4 characters]

                          Enter the number of parts.

3. Binding Notes   [window available]

                          Free text description of the binding notes.

Options

 # line   Accesses the field specified.

Line by line   Accesses all numbered fields.

Accept   Save any changes and exit.

Quit holdings   Exit holdings and do not save changes.

? Help   Provides access to a Library-defined help screen.

Exit   Exit the screen without saving changes.

Types of Holdings Records

Type of Holdings screens include:

- TYPE OF HOLDING SUMMARY — provides a list of all the categories of material defined for this title

- TYPE OF HOLDING DETAIL — provides a description of the type and specifies whether it is an issue, index or supplement. Displays the enumeration, chronology, and other information from the most recent Publication Pattern record and indicates whether the pattern is active or inactive.

The Type of Holding Summary screen describes multiparts or serials. There is no Type of Holding record for single-part items.

There is one Type of Holding record for each physical format and type (basic, supplement, index). Type of Holdings records are equivalent to a unique combination of the 007 and 853/854/855 $o.

Type of Holdings records summarize all the possible parts/volumes by type.

Two examples of TYPE OF HOLDING SUMMARY screens are shown to illustrate the variety of definitions that are possible. There is no limit to the number of Type of Holdings records that can be defined for a title.

Access

The TYPE OF HOLDING SUMMARY screen is accessible from:

- the *Type of holdings display* option within Holdings edit

- the LOCATION COPY DETAIL screen when the *Holdings statement* option is selected

- the Type of Holdings option from the SERIAL COPY SET DETAIL screen

- the PARTS DETAIL screen when you enter ?? in the Type of Holding field

- the *Go to* option in Holdings edit.

The TYPE OF HOLDING DETAIL screen is accessible from:

- the PARTS DETAIL screen when you enter C in the *Type of Holding* field.

Type of Holding Summary

Example 1

```
              TYPE OF HOLDING SUMMARY                      MASTER

LCN      :10008609   Call #: UNC                    ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

    Description                       Type  Supplement/Index type
    -----------                       ----  ---------------------
 1.  Paper                            ISS
    Captions/Labels: Vol.:No.:(Month):(Day):(Year)


1 item(s) in list
Options:
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

Example 2

```
              TYPE OF HOLDING SUMMARY                      MASTER

LCN      :10000312   Call #: KFM2430 1958.A42            ISSN:
Title    :Massachusetts general laws annotated, under arrangement of the off+
Imprint  :St. Paul, West Pub. Co., [1958-              LCCN: 58002790 //r8

    Description                       Type  Supplement/Index type
    -----------                       ----  ---------------------
 1.  Interim Ann. Serv.               ISS
    Captions/Labels: No.:(year):(month)
 2.  Annual Cumulation                ISS
    Captions/Labels: Vol.:(year)
 3.  Pocket Parts                     SUP   Pocket Parts
    Captions/Labels: (year)
 4.  General Index                    IND   General
    Captions/Labels: (year)

4 item(s) in list
Options:
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings   ? Help   Exit
```

Bibliographic Information

The information at the top of the screen is provided by the system and is not user definable.

Column Headings

Column headings are defined on the HOLDINGS DISPLAY DEFINITION (HDD) menu which is available from the HOLDING SETUP MENU (CHSM) in the Cataloguing Module.

Screen Content

Screen content is user definable on the HOLDINGS DISPLAY DEFINITION (HDD) menu which is available from the HOLDING SETUP MENU (CHSM) in the Cataloguing Module.

Each numbered line represents one type of holding record.

Options

 # item   Displays the TYPE OF HOLDING DETAIL screen for the item specified.

Add item   Access a Detail screen template which allows you to add another Type of Holding record.

Delete item(s)   Removes the specified items.

Move #(s)   Allows you to move the Type of Holding record and all of its holdings to another title.

Go to   Provides access to other Holdings edit screens.

Limit list   Allows you to restrict the items displayed to those that contain the search criteria you specify (search criteria must appear on the screen).

Quit holdings   Exit holdings and do not save changes.

? Help   Provides access to a Library-defined help screen.

Exit   Exit the screen without saving changes

Type of Holding Detail

```
             TYPE OF HOLDING DETAIL                      MASTER

LCN     :10008609  Call #: UNC                     ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055


1. Description        : Paper              3. Publication Type: 0  - ISS
2. Supplement/Index Type:
                           ** ACTIVE **   - (1 of 1 Publication Patterns)
Enumeration       Level 1    Level 2   Level 3  Level 4  Level 5  Level 6
 Caption        : Vol.       No.
 Alternate Caption:

Chronology        Level 1    Level 2   Level 3   Level 4
 Caption        : (Month)    (Day)     (Year)
 Alternate Caption:
Frequency : w  - Weekly
Notes     : published weekly except for last week in August and last two week
            s in December
Options:
 # line   Line by line   Patterns   Parts   Delete   File   Quit holdings
 ? Help   Exit
```

Edit Fields

1. Description   [21 characters]

Enter a description of the type of holding. This description displays in the OPAC as a label that proceeds the holdings statement for this Type of Holding.

2. Supplement/Index Type   [21+ characters]

Enter a description of the index or supplement type, such as annual, consolidated, maps, etc. Corresponds to subfield o of the USMARC 854 and 855 fields.

3. Publication Type   [1 digit]

Enter a valid Publication Pattern Code or enter ?? to browse a list of valid codes. Publication types are defined as Publication Pattern Type (PUBP) codes on the Serials Control Code Table Menu (CODM) or the

Holding Setup Menu (CHSM). The standard code descriptions are ISS, IND, and SUP.

0   Issue

The basic issue or a bibliographic unit. Corresponds to the USMARC 853 and 863 fields.

1   Index

Corresponds to the USMARC 855 and 865 fields.

2   Supplement

Accompanying material or special issue. Corresponds to the USMARC 854 and 864 fields.

Options

 # line   Accesses the field specified.

Line by line   Accesses all numbered fields.

Patterns   Displays the PUBLICATION PATTERN SUMMARY screen which lists all of the publication patterns for this type of holding only. See *Publication Pattern* on page 7-45.

```
            PUBLICATION PATTERN SUMMARY                    MASTER

LCN     :10008609   Call #: UNC                    ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055

     Enumeration/Chronology    Frequency      Description
     ---------------------    ---------      -----------
 1.  Vol.:No.:(Month):(Day):  Weekly         Paper
     (Year)
     Notes: published weekly except for last week in August and last two
     weeks in December



1 item(s) in list
Options:
 # item   Add item   Limit list   Quit holdings   ? Help   Exit
```

Parts   Displays the PARTS SUMMARY screen which list the parts for this type
                           of holding only. See *Parts Summary* on page 7-93.

```
          PARTS SUMMARY                              MASTER

 LCN     :10008609   Call #: UNC                 ISSN: 0009-5982
 Title   :The Chronicle of higher education
 Imprint :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

      Part Number          Type of Holding
      -----------          ---------------
 1.   Vol.44:No.17(JAN:09:  Paper - ISS
      1998)
 2.   Vol.44:No.16(JAN:02:  Paper - ISS
      1998)
 3.   Vol.44:No.15(DEC:12:  Paper - ISS
      1997)
 4.   Vol.44:No.14(DEC:05:  Paper - ISS
      1997)
 5.   Vol.44:No.13(NOV:28:  Paper - ISS
      1997)

18 item(s) in list
Options:
 Sequence parts   Move #(s)   # item   Insert at line #   Forward
 Limit list   Quit holdings   ? Help   Exit
```

Delete   Removes this Type of Holding record and parts and publication patterns
                           linked to it.

File   Saves changes to the record and files them into the database.

Quit holdings   Exit holdings and do not save changes.

? Help   Provides access to a Library-defined help screen.

Exit   Exit the screen without saving changes

Publication Pattern

Publication Pattern information is displayed on several screens:

- PUBLICATION PATTERN SUMMARY — provides a list of all publication patterns defined for the title.

- PUBLICATION PATTERN DETAIL — specifies the enumeration, chronology, frequency and regularity of publication.

- PUBLICATION PATTERN SECOND SCREEN — specifies the frequency notes, and alternate enumeration and chronology.

- PUBLICATION PATTERN PREDICTIONS — displays predictions, allows you to specify the starting enumeration and chronology for predictions, as well as receipt and claim delays.

Multiple Patterns

Publication Patterns are linked to Type of Holding records. You can have multiple patterns for each type of holding. Each type of holding has its own set of publication patterns. The set of publication patterns contains the current pattern used for prediction as well as all other variations that the publication has gone through over the years. By creating separate type of holding records for paper and microfiche the system can predict expected arrivals of material in these different formats at different frequencies.

In addition to ACTIVE patterns, you may also have several older INACTIVE patterns.

The system displays the publication patterns for each type of holding (based on the Type of Holding sequence). For each Type of Holding, the most recent publication pattern is displayed first followed by any other publication patterns linked to this Type of Holding.

Active or Inactive Status

Publication Pattern screens display the word ACTIVE or INACTIVE at line 6 on the far right. An ACTIVE pattern is in use by the system to determine the next expected issue. This status cannot be changed directly. Filing a new version of the pattern causes the old pattern to become INACTIVE. You can still *Retrieve* and edit an issue linked to an inactive pattern.

Copy Sets

A copy set of a serial can also be active or inactive. The copy set status is not related to the publication pattern status. The number of copies predicted for each expected issue is equal to the number of active copy

sets that are linked to a particular type of holding. You can display or
edit the copy set status on the SERIAL COPY SET DETAIL screen.

New Pattern

From the Publication Pattern Summary screen you can create new
patterns by selecting *Add item* from the Publication Pattern Summary
screen.

Access

The most direct ways to reach the Publication Pattern screen are:

- From Holdings edit select the *Pub. pattern display* option. The
  system displays the PUBLICATION PATTERN SUMMARY screen
  which lists all the patterns for each Type of Holding on the title.

- From the TYPE OF HOLDING DETAIL screen select the *Patterns*
  option. When you display a publication pattern from the Type of
  Holding screen you see the publication patterns for a specific type of
  holding. For example, if you view the Type of Holding for index
  holdings, then all the publication patterns displayed are those for
  indexes only. You will not see publication patterns for other Types of
  Holdings.

Publication Pattern Summary

```
              PUBLICATION PATTERN SUMMARY                    MASTER

LCN     :10008609   Call #: UNC                      ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

     Enumeration/Chronology   Frequency     Description
     ----------------------   ---------     -----------
 1.  Vol.:No.:(Month):(Day):  Weekly        Issue
     (Year)
 2.  Vol.:No.:(Month):(Day):  Weekly        Issue
     (Year)
     Notes: published weekly except for last week in August and last two
     weeks in December




2 item(s) in list
Options:
 # item   Add item   Delete item(s)   Go to   Limit list   Quit holdings
 ? Help   Exit
```

Bibliographic Information

The information at the top of the screen is provided by the system and is not user definable.

Column Headings

Column headings are defined on the HOLDINGS DISPLAY DEFINITION (HDD) menu which is available from the HOLDING SETUP MENU (CHSM) in the Cataloguing Module.

Screen Content

User definable on the HOLDINGS DISPLAY DEFINITION (HDD) menu which is available from the HOLDING SETUP MENU (CHSM) in the Cataloguing Module.

Each numbered line represents one publication pattern record.

Options

# item	Accesses the field specified.
Add item	Accesses a Detail screen template which allows you to add another Publication Pattern record.
Delete item(s)	Removes the specified items.
Go to	Provides access to other Holdings edit screens.
Limit list	Allows you to restrict the items displayed to those that contain the search criteria you specify (search criteria must appear on the screen).
Quit holdings	Exit holdings and do not save changes.
? Help	Provides access to a Library-defined help screen.
Exit	Exit the screen without saving changes

Publication Pattern Detail

```
              PUBLICATION PATTERN DETAIL                    MASTER
                                           (1 of 2 Publication Patterns)
LCN     :10008609  Call #: UNC                         ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055
Publication Type:ISS - Issue                                ** ACTIVE **
1. Enumeration      Level 1     Level 2    Level 3   Level 4  Level 5 Level 6
   Caption/Label   : Vol.        No.
   Number of Parts :             49
   Numbering Code  :             R
2. Chronology       Level 1     Level 2    Level 3   Level 4
   Caption/Label   : (Month)     (Day)      (Year)
   Code            : M           DD         Y
3. Copy Caption    : c.
4. Ind/Supp Caption:                          Associated Level:
5. Frequency Code  : w -Weekly              6. Auto Prediction : Y
7. Regularity Pattern: U - Monthly (by user)
   Dates Published: 0102,0109,0116,0123,0130,0206,0213,0227,0306,0313,0313,
   Base Level    : 2
   Calendar Change: 09
8. Date Range      :
Options:
 # line   Line by line   Second screen   Predictions   MARC   Delete   File
 Quit holdings   ? Help   Exit
```

Display Fields

The bibliographic information at the top of the screen is provided by the system.

Publication Type   Publication Pattern Type code that describes the category of material, that is the type of holding, that this publication pattern represents. The information in this field is obtained from the *Publication Type* field on the TYPE OF HOLDING DETAIL record. The standard code descriptions are ISS, IND, and SUP. Publication types are defined as Publication Pattern Type (PUBP) codes on the Serials Control Code Table Menu (CODM).

Status

Active   The last filed publication pattern.

Inactive   Previously filed publication pattern.

Using the File Option

File   Saves the current publication pattern – the information on this screen as well as additional information on the PUBLICATION PATTERN SECOND SCREEN and the PUBLICATION PATTERN PREDICTIONS screen. File at the PUBLICATION PATTERN DETAIL screen to save the information on all three screens.

Add or Replace   If you are updating an existing publication pattern, the system prompts:

```
Do you want to retain the old record? (Y/N)
```

The default answer is N.

Y   Retains the initial version of the publication pattern and files the current version as a new pattern.

The new pattern is saved as ACTIVE and the old version as INACTIVE.

Add a pattern when it changes substantially. The old checkin copy holdings statements are linked to the old pattern and the new statements will be linked to the new pattern. The system begins a new separate summary holdings statement for the new pattern.

N   Updates the pattern – replaces the initial version with the current one. The pattern's status does not change.

Update a pattern if it changes only slightly. For example: issues are now published in February instead of March; the expected receipt delay has changed; the text of the enumeration term has been corrected.

Update Expected Information   If the serial has copy sets defined, the system prompts:

```
Do you want next expected information updated?
```

The default answer is N.

Y   Updates the next-expected issue box in the Checkin screen to the starting issue information defined on the PUBLICATION PATTERN PREDICTIONS screen.

The Checkin Screen shows the next-expected issue in box 5.

Changing the starting issue information and then answering Y here has the same effect as *Retrieving* the next expected issue box at the Checkin screen and changing its information there.

N The system ignores the starting issue information defined on the PUBLI-CATION PATTERN PREDICTIONS screen. The Checkin screen's next-expected issue boxes are left unchanged.

Edit Fields

1. Enumeration

[11 characters]

Up to 6 levels of volume numbering can be specified. Enumeration terms are used by the system in holdings statements, lists of parts and serials holding displays.

Caption/Label

[Level 1 – 11 characters; Level 2 – 10 characters; Level 3 – 9 characters; Level 4 – 8 characters; Levels 5 & 6 – 7 characters]

Specify a caption for each level you want to use. Enter punctuation. Most patterns have at least one level. Corresponds to subfields a-f of the USMARC 853, 854, and 855 fields.

Number of Parts

[9+ digits]

Number of units at this enumeration level which make up one unit at the next higher level. Used by the system when predicting issues, for deter-mining when to increment the next higher level's counter. In the sample pattern, 49 numbers make up a volume so the system will add 1 to the volume counter each time the number counter has gone up 49 times. Specify a number for each level of enumeration except the first. (Also see *BASE LEVEL*.)

Numbering Code

[R or C]

Indicates whether the numbering at this enumeration level is continuous or periodically restarted.

A level's numbering is determined by this field together with the *Number of Parts* and the pattern's *BASE LEVEL*.

Corresponds to subfield v of the USMARC 853, 854, and 855 fields.

R Restart the numbering, back to 1 or A, at this enumeration level on a regular basis.

C Continuous numbering. Allows the numbering for this level to increase indefinitely.

2. Chronology	Up to 4 levels of chronology can be specified.
	Corresponds to subfields i-l of the USMARC 853, 854, and 855 fields.

Caption/label   [text]

Enter the caption or label. Enclose this text in round brackets to suppress the display of the text when chronology is displayed. For example, (y.) (mo.) (d.) is replaced by 1997: NOV: 15.

Used by the system as entry prompts and display in holdings statements, parts lists, and serials holdings display.

Code   [Chronology Code or ?? to see a list of valid codes]

Specify a Chronology Code. Specifies the kind of chronological data at this chronology level; e.g. year (YYYY format), month (MMM format), date (MM/DD/YY format).

Chronology codes are defined on the Chronology Codes (CHRN) table on the Serials Control Code Table Menu (CODM).

Used by the system to generate data in holdings statements and to edit-check data entered by the user.

3. Copy Caption   [12 characters]

Prefix for copy numbers.

If you leave this field blank, the system will use the default, c. Specify the same term for all the active patterns of a serial.

Used by the system as the copy number prefix in holdings screens.

Corresponds to subfield t of the USMARC-defined holdings fields 853, 854, and 855.

4. Ind/Supp Caption   [28 characters]

Caption that describes the type of supplementary material. Only valid for indexes and supplements, e.g. *Annual Buyer's Guide*.

Associated
Level   [2 characters]

First character – E(enumeration level) or C(chronology level).

Second character – Level number.

The level of enumeration/chronology that the caption refers to. If you have a value of E1, it means the caption applies to the first enumeration level.

5. Frequency Code [Frequency Code or ?? to see a list of valid codes]

Describes the frequency of publication; e.g. b means bimonthly, or number of issues per year.

Five codes are interpreted by the system: g (biennial – repeat regularity pattern every 2 years), h (triennial – repeat regularity pattern every 3 years), v (quadrennial – every 4 years), y (quinquennial – every 5 years), z (decennial – every 10 years). The system uses this information when predicting the years of expected issues.

Corresponds to subfield w of the USMARC 853, 854, and 855 fields.

Frequency Codes are defined on the Frequency Codes (FREQ) table on the Serials Control Code Table Menu (CODM).

6. Auto Prediction [Y or N]

Y   The system predicts the enumeration, chronology, and expected receipt dates. Predictions display on the Publications Patterns Predictions screen.

N   The pattern is too erratic to predict.

The starting information that you define at the PUBLICATION PATTERN PREDICTIONS screen will be repeated for all expected issues at the Checkin Screen. You may *Retrieve* the next-expected issue and change its enumeration, chronology, or expected receipt date at the CHKM – CHECKIN FOR (SHIPTO CODE) screen.

7. Regularity Pattern [1 char. code]

Enter a Publication regularity code or ?? to see a list of valid codes.

Describes regularity: month-based, season-based, day-based (week-based), erratic, or user-defined.

After you answer this field, the system displays additional fields for detailed information so that it can predict the serial's publication dates. The system displays different detail fields for different Frequency

Types, except that month-based and season-based types are treated identically.

The system uses the predicted publication date to predict the issue's **chronology** (i.e. cover date). For example, if an issue's publication is predicted for April and one of its chronology levels is a months-type, then the prediction for that level would be APR (or some corresponding value such as APRIL, depending on the Chronology Code assigned); if the issue has a seasons-type chronology level, then the prediction for that level would be SPRING (or something similar).

If the receipt and cover dates do not correspond, use the *RECEIPT DELAY* field (on the Predictions screen) to adjust the pattern. For example, a serial whose issues arrive the month before the cover date (the APR issue arrives mid-March, etc.) has a receipt delay of -30 (days).

Corresponds to subfield y of the USMARC-defined holdings fields 853, 854, and 855.

Examples   **Month-based (or Season-based) Regularity Pattern**

```
  7. Regularity Pattern: M - Months
     JA  FE  MR  AP  MA  JN  JL  AU  SE  OC  NO  DE
      1   1   1   1   1   1   1   1   1   1   1   1
     First Issue:  1 Days btn Issues: 25 Base Level: 2  Calendar Change:
```

JA, FE, MR, etc.   [2 digits]

Number of issues published each month of the year. Answer 0 for months in which no issues are published.

FIRST ISSUE   [2 digits]

Day on which the first issue of each month is published. For example, 5 indicates the 5th of each month in which issues are published.

DAYS BTN ISSUES   [2 digits]

Number of days between issues in the months during which more than 1 issue is published. For example, 15 indicates 15 days — if the first issue

date is the 5th and there are 2 issues published in the month, then the predicted second issue date will be the 20th.

This field has no effect if none of the months have more then 1 issue published.

If more issues are predicted in the month than can fit, then the final issues will be predicted on the last day of the month. For example, if the detail information is the same as given in the preceding example but there are 3 issues published in October, then the predicted issue dates will be the 5th, 20th, and 31st.

BASE LEVEL   [1 digit]

The base enumeration level — usually the lowest level but in some month-based patterns the next-to-lowest level.

Used by the system when predicting issues, for determining whether a change in month should reset the numbering. The numbering of the lowest and next-to-lowest levels are also affected by the lowest level's *NUMBERING CODE* (R or C) and *NUMBER OF PARTS* (a number referred to as "M" below).

Refer to Appendix B for additional illustrations of how *NUMBERING CODE*, *CALENDAR CHANGE*, *NUMBER OF PARTS*, and *BASE LEVEL* effect the predicted enumeration.

Lowest level   If you set the *BASE LEVEL* to the **lowest** level (such as 2 in the 2-level sample screen shown earlier in the chapter), then a change in month will not automatically reset the lowest level's numbering.

- If the lowest level's *NUMBERING CODE* is C (continuous), then the level's numbering continues to increase indefinitely.

- If the code is R (reset), then the level's numbering is reset every M issues.

- In either case, the next higher level's numbering is incremented every M issues.

Next-to-lowest level   If you set the *BASE LEVEL* to the **next-to-lowest** level (such as 2 in the 3-level, semimonthly sample serial), then the system can handle patterns with different numbers of issues published each month.

If the lowest level's *NUMBERING CODE* is C (continuous), then that level's numbering increases indefinitely.

If the code is R (reset), then that level's numbering is reset each time a new month begins (or every M issues, whichever comes first).

In either case, the next higher level's numbering is incremented each time a new month begins (or every M issues, whichever comes first).

CALENDAR
CHANGE

[12 characters]

Only affects predictions if the lowest level of enumeration is defined as using a continuous Numbering Code. Can be defined to force the next higher level of enumeration to increment at specific month(s) (MM format) or specific date(s) (MMDD format); for example, 04,10 forces the next highest level of enumeration to increment in April and October while the numbering in the continuous enumeration level continues to increase.Corresponds to subfield x of the USMARC-defined holdings fields 853, 854, and 855.

Day-based Regularity Pattern

```
7. Regularity Pattern: D – Daily
   SU  MO  TU  WE  TH  FR  SA
   0   0   0   1   0   0   0
   Repeat every 1  week(s)  Base Level: 3   Calendar Change: 05
```

SU, MO, TU, etc.

[2 digits]

Number of issues published each day of the week. Answer 0 for days on which no issues are published.

REPEAT EVERY ___
WEEK(S)

[2 digits]

Number of weeks between the weeks in which issues are published. Examples: 1 means issue(s) are published every week; 2 means every second week; and so on.

For an explanation of *Calendar Change*, see previous description.

Erratic Regularity Pattern

```
7. Regularity Pattern: E - Erratic
   Days btn Issues : 73
   Calendar Change :
```

For an explanation of *CALENDAR CHANGE*, see the previous paragraphs.

DAYS BTN ISSUES   [3 digits]

Number of days between issues.

User Definable Regularity Pattern

```
7. Regularity Pattern: U - Monthly (by user)
   Dates Published: 0119,0130,0214,0219,0302,0304,0309,0607
   Base Level    : 2
   Calendar Change:
```

DATES PUBLISHED   [4 digits, MMDD]

Publication dates of the issue. Enter the four digits (do **not** <Enter> until you have entered all of the dates that you expect the item to be published); ADVANCE positions the cursor in the next date field. Commas are inserted by the system after you <Enter>.

For an explanation of *Base Level* and *Calendar Change*, see the previous paragraphs.

8. Date Range   [50 characters]

Range of enumeration and chronology to which the pattern applies. For example, Vol.23 No.2- (1991:February-) for a pattern whose prediction start issue was the February 1991 issue. When you inactivate a pattern, you may add the closing issue's enumeration and chronology here.

This information is stored but not otherwise used by the system.

Corresponds to subfield 3 of the USMARC-defined holdings fields 853, 854, and 855.

Options

 # line   Accesses the field specified.

Line by line   Accesses all numbered fields.

Second screen   Displays the PUBLICATION PATTERN SECOND SCREEN. Provides fields that allow you to add Frequency notes, to specify alternate enumeration and chronology captions and labels, or to define compression, expansion, or caption evaluation criteria.

Predictions   Displays the Publication Pattern Predictions screen.

When the *Predictions* option is selected, the SHIPTO SELECTION screen appears if the title is being received at more than one location.

```
                        SHIPTO SELECTION

     Number of records: 2
     Please select the SHIPTO location that you are receiving for:
     ----------------------------------------------------------------
  1. UNIT5   Acquisition unit 5
  2. UNIT6   Acquisitions unit 6




 Options:
  # line   ? Help   Exit
```

MARC   Displays the MARC record for this title.

Delete   Deletes the current Publication Pattern.

File   Saves changes to the record and files them into the database.

Quit holdings   Exit holdings and do not save changes.

? Help   Provides access to a Library-defined help screen.

Exit   Exit the screen without saving changes

Publication Pattern Second Screen

```
                  PUBLICATION PATTERN SECOND SCREEN              MASTER
                                              (1 of 2 Publication Patterns)
   LCN      :10008609   Call #: UNC                       ISSN: 0009-5982
   Title    :The Chronicle of higher education
   Imprint  :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055
   Publication Type:ISS - Issue                                ** ACTIVE **

   1. Frequency Notes   :

   2. UPC Barcode       : N
   3. Alt. Enumeration    Level 1     Level 2
      Caption/Label     :
   4. Alt. Chronology     Level 1
      Caption/Label     :
   5. Compress/Expand   : 2
   6. Caption Evaluation: 0




   Options:
    # line   Line by line   Accept   Quit holdings   ? Help   Exit
```

*1. FREQUENCY
   NOTES*

[text, window available]

A note about the publication pattern. For example, Monthly with an
extra issue in May and October; 14 issues per volume and
continuously incrementing issue numbers.

This information is displayed on the CHKM - FREQUENCY NOTES DISPLAY
screen.

2. UPC BARCODE	[Y or N]

Indicates if the material has a UPC barcode. Not currently used.

3. Alt. Enumeration	[11 characters]

Two levels of alternative enumeration are available.

Caption/Label	[text]

4. Alt. Chronology	[11 characters]

One level of alternative chronology is available.

Caption/Label	[text]

5. Compress/Expand Indicates whether the holdings data can be compressed or expanded by computer algorithm. Equivalent to the 853/854 First Indicator. See *Holdings Compression and Expansion* on page 4-10.

   0 Cannot compress or expand.

   1 Can compress but not expand.

   2 Can compress or expand.

   3 Unknown.

6. Caption Evaluation Indicates the completeness of the caption levels and whether the captions appear on the bibliographic item. Equivalent to the 853/854 Second Indicator. See *Caption Evaluation* on page 4-11.

   0 Captions verified; all levels present.

   1 Captions verified; all levels may not be present.

   2 Captions unverified; all levels present.

   3 Captions unverified; all levels may not be present.

Options

# line	Accesses the field specified.
Line by line	Accesses all numbered fields.
Accept	Save any changes and exit.
Quit holdings	Exit holdings and do not save changes.
? Help	Provides access to a Library-defined help screen.
Exit	Exit the screen without saving changes.

Publication Pattern Predictions

```
            PUBLICATION PATTERN PREDICTIONS                MASTER
                                            (1 of 2 Publication Patterns)
LCN     :10008609   Call #: UNC                       ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055
Publication Type:ISS - Issue                                 ** ACTIVE **

1. Start Enumeration/Chronology:
   Vol.  : 44        (Day) : 09
   No.   : 18        (Year) : 1998
   (Month): JAN
2. Start Date  : 01/09/98    4. Receipt Delay: 0
3. Prediction #: 2           5. Claim Delay  : 4

Expected  Enumeration                       Chronology
Date      Vol.:No.                          (Month):(Day):(Year)
01-09-98  44:18                             JAN:09:1998
01-16-98  44:19                             JAN:16:1998
01-23-98  44:20                             JAN:23:1998
01-30-98  44:21                             JAN:30:1998
Options:
 # line   Line by line   Accept   Forward   Quit holdings   ? Help   Exit
```

Display Fields

The unnumbered fields at the top of the screen are derived from the MARC bibliographic record.

The unnumbered fields at the bottom of the screen display the system's predicted values for enumeration and chronology if the auto prediction field was answered Y.

Status

Indicates whether the pattern is being used to predict next expected items.

Active

The latest filed publication pattern.

Inactive

The publication pattern has not been filed (such as when a new pattern is being created), or another publication pattern has replaced this pattern.

1. Start Enumeration/ Chronology

[text]

Enter the starting enumeration/chronology for each level.

NOTE: Fields 2-5 can be different for each location (SHIPTO) receiving copies.

2. Start Date

[date]

The starting issue's expected receipt date. Automatic prediction will begin with this issue.

CAUTION: If the pattern has a non-zero *RECEIPT DELAY*, be sure to use it in your calculation.

For example, if the sample serial had a receipt delay of -30 (days) because its issues arrive about a month before the cover date, then the *Start Date* (for the MAR issue) should have been 02/15/98 rather than 03/15/98.

3. Prediction #

[1 digit]

The starting issue's occurrence number within the month. The default is 1.

Enter a number larger than 1 only if the *REGULARITY PATTERN* is month-based, season-based, or user-defined, **and** there is more than 1 issue published in the month. For example, if you have chosen the second issue of April of a semimonthly serial as your starting issue, then the value for this field should be 2.

4. Receipt Delay	[3 digits]
	Approximate number of days after the predicted publication date that receipt of the issue is expected. Use a minus sign if issues are expected **before** the publication date.
	Examples: specify 7 for issues expected about 7 days after their predicted publication dates; specify -61 for issues expected about two months before their publication date; and so on. For most patterns you can assign a 0 value.
5. Claim Delay	[3 digits]
	Number of days between the expected receipt date of a copy of an issue and when the system should generate a claim letter (or report the need for one) if the copy has not yet been received.
Claim Code	The days between later claims after the first claim is determined by the copy set's *Claim Code*, in particular by the code's defined *Claim 2*, *Claim 3*, and *Claim 4* values. The code's defined *Cancel* value determines the number of days after the final claim date that the system should change the copy's status to Missing.

Options

# line	Accesses the field specified.
Line by line	Accesses all numbered fields.
Accept	Save any changes and exit.
Forward	Displays the next screen of predictions.
Quit holdings	Exit holdings and do not save changes.
? Help	Provides access to a Library-defined help screen.
Exit	Exit the screen without saving changes.

Examples of Publication Patterns

The following screens illustrate additional example patterns:

1. biweekly

2. biweekly — with a receipt delay

3. semimonthly — with a varying number of issues per month

4. semimonthly — with a different start issue

5. quarterly

6. quarterly — with continuous numbering

7. annual supplement — with no enumeration

8. weekly — with month-based enumeration

9. weekly — with regular suspension

10. predicted erratic — with a non-predicted level of chronology

11. non-predicted erratic

12. Continuous numbering with Calendar Change.

Biweekly

This pattern illustrates a serial with basic issues published every second Wednesday. There are 26 No's per Vol, and thus 1 Vol per year.

Publication Pattern

```
               PUBLICATION PATTERN DETAIL                      MASTER
                                          (1 of 5 Publication Patterns)
LCN      : 10008609   Call #: UNC                     ISSN: 0009-5982
Title    : The Chronicle of higher education
Imprint  : [Washington, etc., Chronicle of higher e+      LCCN: sf 80001055
Publication Type: ISS - Paper                                ** ACTIVE **
 1. Enumeration      Level 1     Level 2    Level 3   Level 4  Level 5 Level 6
    Caption/Label  : Vol.        No.
    Number of Parts :            26
    Numbering Code  :            R
 2. Chronology       Level 1     Level 2    Level 3   Level 4
    Caption/Label   : (Date)
    Code            : D
 3. Copy Caption    :
 4. Ind/Supp Caption:                             Associated Level:
 5. Frequency Code  : e -Biweekly (every 2 weeks)   6. Auto Prediction : Y
 7. Regularity Pattern: D - Daily
    SU  MO  TU  WE  TH  FR  SA
     0   0   0   1   0   0   0
    Repeat every  2 week(s)  Base Level: 2   Calendar Change:
 8. Date Range      :
Options:
  # line    Line by line   Second screen   Predictions   MARC   Delete   File
  Quit holdings   ? Help    Exit
```

Predictions

```
              PUBLICATION PATTERN PREDICTIONS                MASTER
                                          (1 of 5 Publication Patterns)
 LCN     : 10008609   Call #: UNC                        ISSN: 0009-5982
 Title   : The Chronicle of higher education
 Imprint : [Washington, etc., Chronicle of higher e+     LCCN: sf 80001055
 Publication Type: ISS - Paper                                ** ACTIVE **

 1. Start Enumeration/Chronology:
    Vol.   : 44
    No.    : 1
    (Date) : 01/07/98
 2. Start Date  : 01/07/98    4. Receipt Delay: 0
 3. Prediction #:  1          5. Claim Delay  : 4

 Expected  Enumeration                     Chronology
 Date      Vol.:No.                        (Date)
 01-07-98  44:1                            01/07/98
 01-21-98  44:2                            01/21/98
 02-04-98  44:3                            02/04/98
 02-18-98  44:4                            02/18/98
Options:
   # line   Line by line   Accept   Forward   Quit holdings   ? Help   Exit
```

Biweekly With Receipt Delay

This pattern is almost the same as the biweekly sample pattern. The difference is that this biweekly serial is usually received a week **after** its cover date, and thus its *RECEIPT DELAY* is 7 days. A receipt delay must be defined because the expected and chronology dates are not the same. The *Receipt Delay* field is on the Predictions screen. When the *Receipt Delay* field is used, the *Start Date* field also changes by the number of days defined in the receipt delay.

Publication Pattern

```
                 PUBLICATION PATTERN DETAIL                    MASTER
                                          (1 of 5 Publication Patterns)
LCN     : 10008609  Call #: UNC                      ISSN: 0009-5982
Title   : The Chronicle of higher education
Imprint : [Washington, etc., Chronicle of higher e+      LCCN: sf 80001055
Publication Type: ISS - Paper                                ** ACTIVE **
 1. Enumeration      Level 1    Level 2    Level 3   Level 4  Level 5 Level 6
    Caption/Label  : Vol.       No.
    Number of Parts :           26
    Numbering Code  :           R
 2. Chronology       Level 1    Level 2    Level 3   Level 4
    Caption/Label  : (Date)
    Code           : D
 3. Copy Caption    :
 4. Ind/Supp Caption:                             Associated Level:
 5. Frequency Code  : e -Biweekly (every 2 weeks)    6. Auto Prediction : Y
 7. Regularity Pattern: D - Daily
    SU   MO   TU   WE   TH   FR   SA
    0    0    0    1    0    0    0
    Repeat every 2  week(s)  Base Level: 2   Calendar Change:
 8. Date Range      :
Options:
  # line   Line by line   Second screen   Predictions   MARC   Delete   File
  Quit holdings   ? Help   Exit
```

Predictions

```
                  PUBLICATION PATTERN PREDICTIONS              MASTER
                                          (1 of 5 Publication Patterns)
 LCN     : 10008609   Call #: UNC                        ISSN: 0009-5982
 Title   : The Chronicle of higher education
 Imprint : [Washington, etc., Chronicle of higher e+      LCCN: sf 80001055
 Publication Type: ISS - Paper                                ** ACTIVE **

  1. Start Enumeration/Chronology:
     Vol.  : 44
     No.   : 1
     (Date) : 01/07/98
  2. Start Date  : 01/14/98    4. Receipt Delay: 7
  3. Prediction #:  1          5. Claim Delay  : 4

  Expected  Enumeration                      Chronology
  Date      Vol.:No.                         (Date)
  01-14-98  44:1                             01/07/98
  01-28-98  44:2                             01/21/98
  02-11-98  44:3                             02/04/98
  02-25-98  44:4                             02/18/98
 Options:
   # line   Line by line   Accept   Forward   Quit holdings   ? Help   Exit
```

Semimonthly

This pattern illustrates a serial with basic issues normally published twice a month. However, a third issue is published in February and May, and no issues are published in March. The *BASE LEVEL* is set to the next-to-lowest level of enumeration (2) so that the No numbering is incremented at the beginning of each month even though the number of Pt's varies from month to month. Because March is skipped, there are only 11 No's per Vol.

Refer to Appendix B for additional illustrations of how *NUMBERING CODE*, *NUMBER OF PARTS*, *CALENDAR CHANGE*, and *BASE LEVEL* effect the predicted enumeration.

Publication Pattern

```
                PUBLICATION PATTERN DETAIL                    MASTER
                                           (1 of 5 Publication Patterns)
LCN     : 10008609  Call #: UNC                       ISSN: 0009-5982
Title   : The Chronicle of higher education
Imprint : [Washington, etc., Chronicle of higher e+      LCCN: sf 80001055
Publication Type: ISS - Paper                               ** ACTIVE **
 1. Enumeration      Level 1     Level 2    Level 3   Level 4  Level 5 Level 6
    Caption/Label  : Vol.        No.        Pt.
    Number of Parts :            11         3
    Numbering Code  :            R          R
 2. Chronology       Level 1     Level 2    Level 3   Level 4
    Caption/Label  : (Year)      (Month)
    Code           : Y           M
 3. Copy Caption    :
 4. Ind/Supp Caption:                            Associated Level:
 5. Frequency Code  : s -Semimonthly            6. Auto Prediction : Y
 7. Regularity Pattern: M - Monthly
    JA  FE  MR  AP  MA  JN  JL  AU  SE  OC  NO  DE
     2   3   0   1   3   2   2   2   2   2   2   2
    First Issue:  5 Days btn Issues: 10 Base Level: 2  Calendar Change:
 8. Date Range      :
Options:
  # line   Line by line   Second screen   Predictions   MARC   Delete   File
  Quit holdings   ? Help   Exit
```

Predictions

```
                PUBLICATION PATTERN PREDICTIONS              MASTER
                                            (1 of 5 Publication Patterns)
LCN      : 10008609   Call #: UNC                      ISSN: 0009-5982
Title    : The Chronicle of higher education
Imprint  : [Washington, etc., Chronicle of higher e+      LCCN: sf 80001055
Publication Type: ISS - Paper                                ** ACTIVE **

 1. Start Enumeration/Chronology:
    Vol.   : 33       (Year) : 1998
    No.    : 1        (Month): JAN
    Pt.    : A
 2. Start Date  : 01/05/98    4. Receipt Delay: 0
 3. Prediction #:  1          5. Claim Delay  : 5


 Expected  Enumeration                        Chronology
 Date      Vol.:No.:Pt.                       (Year):(Month)
 01-05-98  33:1:A                             1998:JAN
 01-15-98  33:1:B                             1998:JAN
 02-05-98  33:2:A                             1998:FEB
 02-15-98  33:2:B                             1998:FEB
Options:
  # line   Line by line   Accept   Forward   Quit holdings   ? Help   Exit
```

Additional predictions are provided to show the pattern. Notice that February and May are the only months when Part C is predicted.

```
Expected  Enumeration                        Chronology
Date      Vol.:No.:Pt.                       (Year):(Month)
01-05-98  33:1:A                             1998:JAN
01-15-98  33:1:B                             1998:JAN
02-05-98  33:2:A                             1998:FEB
02-15-98  33:2:B                             1998:FEB
02-25-98  33:2:C                             1998:FEB
04-05-98  33:3:A                             1998:APR
05-05-98  33:4:A                             1998:MAY
05-15-98  33:4:B                             1998:MAY
05-25-98  33:4:C                             1998:MAY
06-05-98  33:5:A                             1998:JUN
06-15-98  33:5:B                             1998:JUN
07-05-98  33:6:A                             1998:JUL
07-15-98  33:6:B                             1998:JUL
08-05-98  33:7:A                             1998:AUG
08-15-98  33:7:B                             1998:AUG
09-05-98  33:8:A                             1998:SEP
09-15-98  33:8:B                             1998:SEP
10-05-98  33:9:A                             1998:OCT
10-15-98  33:9:B                             1998:OCT
11-05-98  33:10:A                            1998:NOV
11-15-98  33:10:B                            1998:NOV
12-05-98  33:11:A                            1998:DEC
12-15-98  33:11:B                            1998:DEC
01-05-99  34:1:A                             1999:JAN
01-15-99  34:1:B                             1999:JAN
```

Semimonthly With Different Start Issue

This pattern is the same as the semimonthly pattern except that a different starting issue was selected at the PUBM - PUBLICATION PATTERN SECOND SCREEN. Because we start with the third rather than first issue of the month, the *PREDICTION #* value is 3 rather than 1. Both the starting issue and the *Prediction #* are defined on the Predictions screen.

Publication Pattern

```
                  PUBLICATION PATTERN DETAIL                    MASTER
                                              (1 of 5 Publication Patterns)
LCN     : 10008609  Call #: UNC                        ISSN: 0009-5982
Title   : The Chronicle of higher education
Imprint : [Washington, etc., Chronicle of higher e+      LCCN: sf 80001055
Publication Type: ISS - Paper                              ** ACTIVE **
 1. Enumeration      Level 1    Level 2    Level 3   Level 4  Level 5 Level 6
    Caption/Label   : Vol.       No.        Pt.
    Number of Parts :            11         3
    Numbering Code  :            R          R
 2. Chronology       Level 1    Level 2    Level 3   Level 4
    Caption/Label   : (Year)     (Month)
    Code            : Y          M
 3. Copy Caption    :
 4. Ind/Supp Caption:                          Associated Level:
 5. Frequency Code  : s -Semimonthly           6. Auto Prediction : Y
 7. Regularity Pattern: M - Monthly
    JA  FE  MR  AP  MA  JN  JL  AU  SE  OC  NO  DE
    2   3   0   1   3   2   2   2   2   2   2   2
    First Issue: 5  Days btn Issues: 10 Base Level: 2  Calendar Change:
 8. Date Range      :
Options:
  # line   Line by line   Second screen   Predictions   MARC   Delete   File
  Quit holdings   ? Help   Exit
```

```
                    PUBLICATION PATTERN PREDICTIONS                MASTER
(1 of 5 Publication Patterns)
LCN     : 10008609   Call #: UNC                       ISSN: 0009-5982
Title   : The Chronicle of higher education
Imprint : [Washington, etc., Chronicle of higher e+     LCCN: sf 80001055
Publication Type: ISS - Paper                              ** ACTIVE **

 1. Start Enumeration/Chronology:
    Vol.  : 33       (Year) : 1998
    No.   : 2        (Month): FEB
    Pt.   : C
 2. Start Date  : 02/25/98    4. Receipt Delay: 0
 3. Prediction #:  3          5. Claim Delay  : 5


 Expected  Enumeration                          Chronology
 Date      Vol.:No.:Pt.                         (Year):(Month)
 02-25-98  33:2:C                               1998:FEB
 04-05-98  33:3:A                               1998:APR
 05-05-98  33:4:A                               1998:MAY
 05-15-98  33:4:B                               1998:MAY
Options:    Enter specified line number
  # line   Line by line   Accept   Forward   Quit holdings   ? Help   Exit
```

Quarterly

This pattern illustrates a serial with basic issues published 4 times a year: in February, May, August, and November. Also notice that each `Vol` begins in May rather than with the first issue of the calendar year.

The Chronology Code `Q-APR` was set up by the library for serials whose first quarter is April to June rather than January to March.

Prediction Pattern

```
                 Online Catalogue PUBLICATION PATTERN DETAIL
Local Control #:  10008609                       (1 of 5 Publication Patterns)
Title      : The Chronicle of higher education
Author     : Editorial Projects for Education, Inc.
Publisher  : Chronicle of higher education, etc.] 1966
Publication Type: ISS - Paper                                     ** ACTIVE **
 1. Enumeration      Level 1     Level 2     Level 3    Level 4  Level 5 Level 6
    Caption/Label  : Vol.        No.
    Number of Parts :            4
    Numbering Code  :            R
 2. Chronology       Level 1     Level 2     Level 3    Level 4
    Caption/Label  : (Year)      (Qtr)
    Code           : Y           Q-APR
 3. Copy Caption    :
 4. Ind/Supp Caption:                                Associated Level:
 5. Frequency Code  : q -Quarterly               6. Auto Prediction : Y
 7. Regularity Pattern: M - Monthly
    JA  FE  MR  AP  MA  JN  JL  AU  SE  OC  NO  DE
    0   1   0   0   1   0   0   1   0   0   1   0
    First Issue: 1 Days btn Issues: 0  Base Level: 2  Calendar Change:
 8. Date Range      :
Options:
  # line   Line by line   Second screen   Predictions   MARC   Delete   File
  Quit holdings   ? Help   Exit
```

Predictions

```
               Online Catalogue PUBLICATION PATTERN PREDICTIONS
Local Control #:  10008609                   (1 of 5 Publication Patterns)
Title     : The Chronicle of higher education
Author    : Editorial Projects for Education, Inc.
Publisher : Chronicle of higher education, etc.] 1966
Publication Type: ISS - Paper                              ** ACTIVE **

 1. Start Enumeration/Chronology:
    Vol.  : 45       (Qtr) : 4th qtr
    No.   : 4
    (Year) : 1997
 2. Start Date  : 02/01/98    4. Receipt Delay: 0
 3. Prediction #:  1         5. Claim Delay  : 4


 Expected  Enumeration                        Chronology
 Date      Vol.:No.                           (Year):(Qtr)
 02-01-98  45:4                                1997:4th qtr
 05-01-98  46:1                                1998:1st qtr
 08-01-98  46:2                                1998:2nd qtr
 11-01-98  46:3                                1998:3rd qtr
Options:
  # line   Line by line   Accept   Forward   Quit holdings   ? Help   Exit
```

Quarterly With Continuous Numbering

This pattern is the same as the quarterly pattern except that the No increases continually — it is not restarted for each Vol. The *NUMBERING CODE* is C, but the Number of Parts is left at 4 because the Vol numbering still needs to be incremented every 4 No's.

Notice that the Calendar change field is set to 05 (fifth month) so that the system is forced to increment the Vol. field in May.

Detailed Display

```
                 Online Catalogue PUBLICATION PATTERN DETAIL
Local Control #:  10008609                      (1 of 5 Publication Patterns)
Title      : The Chronicle of higher education
Author     : Editorial Projects for Education, Inc.
Publisher  : Chronicle of higher education, etc.] 1966
Publication Type: ISS - Paper                                ** ACTIVE **
 1. Enumeration       Level 1     Level 2     Level 3   Level 4  Level 5 Level 6
    Caption/Label   : Vol.        No.
    Number of Parts :             4
    Numbering Code  :             C
 2. Chronology        Level 1     Level 2     Level 3   Level 4
    Caption/Label   : (Year)      (Qtr)
    Code            : Y           Q-APR
 3. Copy Caption     :
 4. Ind/Supp Caption:                            Associated Level:
 5. Frequency Code  : q -Quarterly              6. Auto Prediction : Y
 7. Regularity Pattern: M - Monthly
    JA  FE  MR  AP  MA  JN  JL  AU  SE  OC  NO  DE
     0   1   0   0   1   0   0   1   0   0   1   0
    First Issue:  1 Days btn Issues:  0 Base Level: 2  Calendar Change: 05
 8. Date Range       :
Options:
  # line   Line by line   Second screen   Predictions   MARC   Delete   File
  Quit holdings   ? Help   Exit
```

Predictions

```
              Online Catalogue PUBLICATION PATTERN PREDICTIONS
Local Control #:  10008609                  (1 of 5 Publication Patterns)
Title     : The Chronicle of higher education
Author    : Editorial Projects for Education, Inc.
Publisher  : Chronicle of higher education, etc.] 1966
Publication Type: ISS - Paper                                ** ACTIVE **

 1. Start Enumeration/Chronology:
    Vol.  : 45       (Qtr)  : 4th qtr
    No.   : 4
    (Year) : 1997
 2. Start Date  : 02/01/98    4. Receipt Delay: 0
 3. Prediction #: 1          5. Claim Delay  : 4

 Expected  Enumeration                        Chronology
 Date      Vol.:No.                           (Year):(Qtr)
 02-01-98  45:4                               1997:4th qtr
 05-01-98  46:5                               1998:1st qtr
 08-01-98  46:6                               1998:2nd qtr
 11-01-98  46:7                               1998:3rd qtr
Options:
  # line   Line by line   Accept   Forward   Quit holdings   ? Help   Exit
```

Annual Supplement

This pattern illustrates a supplement that is published annually in November. It is unnumbered and thus has no enumeration, only chronology.

Publication Pattern

```
                   Online Catalogue PUBLICATION PATTERN DETAIL
Local Control #:  10008609                     (1 of 1 Publication Patterns)
Title     : The Chronicle of higher education
Author    : Editorial Projects for Education, Inc.
Publisher : Chronicle of higher education, etc.] 1966
Publication Type: SUP - Annual Suppl.                         ** ACTIVE **
 1. Enumeration      Level 1     Level 2    Level 3   Level 4  Level 5 Level 6
    Caption/Label   :
    Number of Parts :
    Numbering Code  :
 2. Chronology       Level 1     Level 2    Level 3   Level 4
    Caption/Label   : (Year)
    Code            : Y
 3. Copy Caption    :
 4. Ind/Supp Caption:                            Associated Level:
 5. Frequency Code  : a -Annual                6. Auto Prediction : Y
 7. Regularity Pattern: M - Monthly
    JA  FE  MR  AP  MA  JN  JL  AU  SE  OC  NO  DE
    0   0   0   0   0   0   0   0   0   0   1   0
    First Issue: 1  Days btn Issues:   Base Level: 0  Calendar Change:
 8. Date Range      :
Options:
  # line   Line by line   Second screen   Predictions   MARC   Delete   File
  Quit holdings   ? Help   Exit
```

Predictions

```
              Online Catalogue PUBLICATION PATTERN PREDICTIONS
Local Control #:  10008609                   (1 of 1 Publication Patterns)
Title     : The Chronicle of higher education
Author    : Editorial Projects for Education, Inc.
Publisher : Chronicle of higher education, etc.] 1966
Publication Type: SUP - Annual Suppl.                       ** ACTIVE **

 1. Start Enumeration/Chronology:
    (Year) : 1998


 2. Start Date  : 11/01/98    4. Receipt Delay:
 3. Prediction #:  1          5. Claim Delay  : 25

 Expected  Enumeration                     Chronology
 Date                                      (Year)
 11-01-98                                  1998
 11-01-99                                  1999
 11-01-00                                  2000
 11-01-01                                  2001
Options:
  # line   Line by line   Accept   Forward   Quit holdings   ? Help   Exit
```

Alternative Setup

Rather than a monthly regularity pattern, you can choose a user-defined pattern and enter the exact date that the annual supplement is published, in this example, 1101 – November1.

```
                Online Catalogue PUBLICATION PATTERN DETAIL
Local Control #:  10008609                     (1 of 1 Publication Patterns)
Title      : The Chronicle of higher education
Author     : Editorial Projects for Education, Inc.
Publisher  : Chronicle of higher education, etc.] 1966
Publication Type: SUP - Annual Suppl.                          ** ACTIVE **
 1. Enumeration     Level 1     Level 2     Level 3    Level 4  Level 5 Level 6
    Caption/Label   :
    Number of Parts :
    Numbering Code  :
 2. Chronology      Level 1     Level 2     Level 3    Level 4
    Caption/Label   : (Year)
    Code            : Y
 3. Copy Caption    :
 4. Ind/Supp Caption:                          Associated Level:
 5. Frequency Code  : a -Annual                6. Auto Prediction : Y
 7. Regularity Pattern: U - Monthly (by user)
    Dates Published: 1101
    Base Level     : 0
    Calendar Change:
 8. Date Range      :
Options:
  # line   Line by line   Second screen   Predictions   MARC   Delete   File
  Quit holdings   ? Help   Exit
```

Predictions

```
               Online Catalogue PUBLICATION PATTERN PREDICTIONS
Local Control #:  10008609                     (1 of 1 Publication Patterns)
Title      : The Chronicle of higher education
Author     : Editorial Projects for Education, Inc.
Publisher  : Chronicle of higher education, etc.] 1966
Publication Type: SUP - Annual Suppl.                           ** ACTIVE **

 1. Start Enumeration/Chronology:
    (Year) : 1998


 2. Start Date  : 11/01/98     4. Receipt Delay:
 3. Prediction #: 1            5. Claim Delay  : 25

 Expected   Enumeration                         Chronology
 Date                                           (Year)
 11-01-98                                        1998
 11-01-99                                        1999
 11-01-00                                        2000
 11-01-01                                        2001
Options:
   # line   Line by line   Accept   Forward   Quit holdings   ? Help   Exit
```

Weekly With Monthly Enumeration

This pattern illustrates a serial with basic issues (Pt's) published every Wednesday and a level of enumeration (No) that increments at the start of each month. Thus there are 4 Pt's per No some months, and 5 Pt's per No other months (because some months have 4 Wednesdays and some have 5). This combination of day-based chronology and month-based enumeration can be handled by ADVANCE by using the U regularity pattern. This choice permits you to specify the exact date(s) when an issue is published. However, you must enter each date individually and update the predicted dates each year. That is, if you have 52 issues that are published every Wednesday, then you must enter all 52 dates for 1998 and edit the regularity pattern when you update for 1999. We have set the Number of Parts to 5 for the Pt's level. Since we have chosen a Base Level of 2, the system automatically resets the Pt level when the month changes. This accommodates the need for 4 Pt's in some months and 5 Pt's in other months.

Publication Pattern

```
                  Online Catalogue PUBLICATION PATTERN DETAIL
Local Control #:  10008609                    (1 of 5 Publication Patterns)
Title     : The Chronicle of higher education
Author    : Editorial Projects for Education, Inc.
Publisher : Chronicle of higher education, etc.] 1966
Publication Type: ISS - Paper                                 ** ACTIVE **
 1. Enumeration      Level 1     Level 2     Level 3   Level 4  Level 5 Level 6
    Caption/Label  : Vol.        No.         Pt.
    Number of Parts :            12          5
    Numbering Code  :            R           R
 2. Chronology      Level 1     Level 2     Level 3   Level 4
    Caption/Label  : (Year)      (Date)
    Code           : Y           D
 3. Copy Caption   :
 4. Ind/Supp Caption:                              Associated Level:
 5. Frequency Code  : w -Weekly                6. Auto Prediction : Y
 7. Regularity Pattern: U - Monthly (by user)
    Dates Published: 0107,0114,0121,0128,0204,0211,0218,0225,0304,0311,0318+
    Base Level    : 2
    Calendar Change:
 8. Date Range     :
Options:
  # line   Line by line   Second screen   Predictions   MARC   Delete   File
  Quit holdings   ? Help   Exit
```

Predictions

```
              Online Catalogue PUBLICATION PATTERN PREDICTIONS
Local Control #:  10008609                    (1 of 5 Publication Patterns)
Title     : The Chronicle of higher education
Author    : Editorial Projects for Education, Inc.
Publisher : Chronicle of higher education, etc.] 1966
Publication Type: ISS - Paper                                 ** ACTIVE **

 1. Start Enumeration/Chronology:
    Vol.  : 45        (Year) : 1998
    No.   : 3         (Date) : 03/04/98
    Pt.   : 1
 2. Start Date  : 03/04/98    4. Receipt Delay: 0
 3. Prediction #:  1          5. Claim Delay  : 4

 Expected  Enumeration                        Chronology
 Date      Vol.:No.:Pt.                       (Year):(Date)
 03-04-98  45:3:1                             1998:03/04/98
 03-11-98  45:3:2                             1998:03/11/98
 03-18-98  45:3:3                             1998:03/18/98
 03-25-98  45:3:4                             1998:03/25/98
Options:
  # line   Line by line   Accept   Forward   Quit holdings   ? Help   Exit
```

The following additional predictions illustrate the pattern more completely. Notice that April has 5 parts predicted whereas May has only 4.

```
 Expected  Enumeration                        Chronology
 Date      Vol.:No.:Pt.                       (Year):(Date)
 03-25-98  45:3:4                             1998:03/25/98
 04-01-98  45:4:1                             1998:04/01/98
 04-08-98  45:4:2                             1998:04/08/98
 04-15-98  45:4:3                             1998:04/15/98
 04-22-98  45:4:4                             1998:04/22/98
 04-29-98  45:4:5                             1998:04/29/98
 05-06-98  45:5:1                             1998:05/06/98
 05-13-98  45:5:2                             1998:05/13/98
 05-20-98  45:5:3                             1998:05/20/98
 05-27-98  45:5:4                             1998:05/27/98
 06-03-98  45:6:1                             1998:06/03/98
```

Weekly With Regular Suspension

This pattern illustrates a serial published every Wednesday except in June and July, when no issues are published. Because the chronology and enumeration is day-based, a regular publication suspension cannot be predicted by the pattern. A possible solution is described. Define the pattern as though the serial were published weekly throughout the year, but with the correct Number of Parts: (43 No's per Vol rather than 52). Use the U regularity pattern to specify the exact date(s) (format MMDD) when the issue is published this year (all 43 issues). At the end of the year, you will need to update this publication pattern with the list of Dates Published for next year. When you are entering the dates, do not enter any for June and July - this is the time that the publication is suspended.

Define the Dates Published field as follows:

Dates Published:
0107,0114,0121,0128,0204,0211,0218,0225,0304,0311,0318,
0325,0401,0408,0415,0422,0429,0506,0513,0520,0527,0805,
0812,0819,0826,0902,0909,0916,0923,0930,1007,1014,1021,
1028,1104 1111,1118,1125,1202,1209,1216,1223,1230

Publication Pattern

```
                Online Catalogue PUBLICATION PATTERN DETAIL
Local Control #:  10008609                    (1 of 5 Publication Patterns)
Title     : The Chronicle of higher education
Author    : Editorial Projects for Education, Inc.
Publisher : Chronicle of higher education, etc.] 1966
Publication Type: ISS - Paper                                  ** ACTIVE **
 1. Enumeration     Level 1     Level 2    Level 3   Level 4  Level 5 Level 6
    Caption/Label  : Vol.       No.
    Number of Parts :           43
    Numbering Code  :           R
 2. Chronology      Level 1     Level 2    Level 3   Level 4
    Caption/Label  : (Year)     (Date)
    Code           : Y          D
 3. Copy Caption    :
 4. Ind/Supp Caption:                             Associated Level:
 5. Frequency Code  : w -Weekly                6. Auto Prediction : Y
 7. Regularity Pattern: U - Monthly (by user)
    Dates Published: 0107,0114,0121,0128,0204,0211,0218,0225,0304,0311,0318+
    Base Level     : 2
    Calendar Change:
 8. Date Range      :
Options:
  # line   Line by line   Second screen   Predictions   MARC   Delete   File
  Quit holdings   ? Help   Exit
```

Predictions

```
                Online Catalogue PUBLICATION PATTERN PREDICTIONS
Local Control #:  10008609                    (1 of 5 Publication Patterns)
Title     : The Chronicle of higher education
Author    : Editorial Projects for Education, Inc.
Publisher : Chronicle of higher education, etc.] 1966
Publication Type: ISS - Paper                               ** ACTIVE **

 1. Start Enumeration/Chronology:
    Vol.  : 45       (Date) : 05/06/98
    No.   : 18
    (Year) : 1998
 2. Start Date  : 05/06/98    4. Receipt Delay: 0
 3. Prediction #:  1          5. Claim Delay  : 4

 Expected  Enumeration                       Chronology
 Date      Vol.:No.                          (Year):(Date)
 05-06-98  45:18                             1998:05/06/98
 05-13-98  45:19                             1998:05/13/98
 05-20-98  45:20                             1998:05/20/98
 05-27-98  45:21                             1998:05/27/98
Options:
  # line   Line by line   Accept   Forward   Quit holdings   ? Help   Exit
```

The following additional predictions illustrate the pattern more completely.

```
 Expected  Enumeration                       Chronology
 Date      Vol.:No.                          (Year):(Date)
 05-06-98  45:18                             1998:05/06/98
 05-13-98  45:19                             1998:05/13/98
 05-20-98  45:20                             1998:05/20/98
 05-27-98  45:21                             1998:05/27/98
 08-05-98  45:22                             1998:08/05/98
 08-12-98  45:23                             1998:08/12/98
 08-19-98  45:24                             1998:08/19/98
 08-26-98  45:25                             1998:08/26/98
 09-02-98  45:26                             1998:09/02/98
 09-09-98  45:27                             1998:09/09/98
  ...
 12-02-98  45:39                             1998:12/02/98
 12-09-98  45:40                             1998:12/09/98
 12-16-98  45:41                             1998:12/16/98
 12-23-98  45:42                             1998:12/23/98
 12-30-98  45:43                             1998:12/30/98
```

Predicted Erratic

This pattern illustrates a serial with 5 issues per year that is published erratically, at no particular time of the year. You know "what" but not "when". Specify enumeration levels and a period of 73 (i.e. 365/5) days between issues so that the system predicts enumeration numbering and **approximate** receipt dates, but specify a long *CLAIM DELAY* of 60 days so that the system is not too quick to generate claims for "overdue" issues.

Because the serial also uses varying forms in its second level of chronology (e.g. *DECEMBER*, *YEAR END*, *MID-WINTER*, etc.), assign NP (meaning "no prediction") as the second level's *CHRONOLOGY CODE*. When checking in an issue, you will be able to enter any value you wish for this chronology level.

Publication Pattern

```
                 Online Catalogue PUBLICATION PATTERN DETAIL
Local Control #:  10008609                       (1 of 5 Publication Patterns)
Title      : The Chronicle of higher education
Author     : Editorial Projects for Education, Inc.
Publisher  : Chronicle of higher education, etc.] 1966
Publication Type: ISS - Paper                                   ** ACTIVE **
 1. Enumeration      Level 1     Level 2    Level 3   Level 4  Level 5 Level 6
    Caption/Label  : Vol.        No.
    Number of Parts :            5
    Numbering Code  :            R
 2. Chronology       Level 1     Level 2    Level 3   Level 4
    Caption/Label  : (Year)      (When)
    Code           : Y           NP
 3. Copy Caption    :
 4. Ind/Supp Caption:                               Associated Level:
 5. Frequency Code  : 5 -Copies                6. Auto Prediction : Y
 7. Regularity Pattern: E - Erratic
    Days btn Issues :  73
    Calendar Change :

 8. Date Range      :
Options:
  # line   Line by line   Second screen   Predictions   MARC   Delete   File
  Quit holdings   ? Help   Exit
```

Predictions

```
                Online Catalogue PUBLICATION PATTERN PREDICTIONS
Local Control #:  10008609                   (1 of 5 Publication Patterns)
Title     : The Chronicle of higher education
Author    : Editorial Projects for Education, Inc.
Publisher : Chronicle of higher education, etc.] 1966
Publication Type: ISS - Paper                                ** ACTIVE **

 1. Start Enumeration/Chronology:
    Vol.  : 55        (When) : YEAR END
    No.   : 1
    (Year) : 1998
 2. Start Date  : 01/01/98    4. Receipt Delay: 0
 3. Prediction #:  1         5. Claim Delay  : 60

 Expected  Enumeration                     Chronology
 Date      Vol.:No.                        (Year):(When)
 01-01-98  55:1                            1998:YEAR END
 03-15-98  55:2                            1998
 05-27-98  55:3                            1998
 08-08-98  55:4                            1998
Options:
  # line   Line by line   Accept   Forward   Quit holdings   ? Help   Exit
```

The following additional predictions illustrate the pattern more
completely. Notice that the system cannot predict the 2nd level of chro-
nology since the No Predictions Chronology Code was used.

```
 Expected  Enumeration                     Chronology
 Date      Vol.:No.                        (Year):(When)
 01-01-98  55:1                            1998:YEAR END
 03-15-98  55:2                            1998
 05-27-98  55:3                            1998
 08-08-98  55:4                            1998
 10-20-98  55:5                            1998
 01-01-99  56:1                            1999
 03-15-99  56:2                            1999
 05-27-99  56:3                            1999
 08-08-99  56:4                            1999
 10-20-99  56:5                            1999
```

Non-predicted Erratic

This pattern illustrates a serial, with an unknown number of issues per year, that is published erratically, at no particular time of the year. Turn auto-prediction off; specify 99999 (or more) No's per Vol because you do not know how many there will be; and specify 365 days between issues so that the system does not forget about the serial.

Publication Pattern

```
                Online Catalogue PUBLICATION PATTERN DETAIL
Local Control #:  10008609                    (1 of 5 Publication Patterns)
Title     : The Chronicle of higher education
Author    : Editorial Projects for Education, Inc.
Publisher : Chronicle of higher education, etc.] 1966
Publication Type: ISS - Paper                                ** ACTIVE **
 1. Enumeration      Level 1    Level 2    Level 3   Level 4  Level 5 Level 6
    Caption/Label  : Vol.       No.
    Number of Parts :           99999
    Numbering Code  :           R
 2. Chronology       Level 1    Level 2    Level 3   Level 4
    Caption/Label  : (Year)     (Month)
    Code           : Y          M
 3. Copy Caption    :
 4. Ind/Supp Caption:                          Associated Level:
 5. Frequency Code  : x -Completely irregular      6. Auto Prediction : N
 7. Regularity Pattern: E - Erratic
    Days btn Issues : 365
    Calendar Change :

 8. Date Range      :
Options:
  # line   Line by line   Second screen   Predictions   MARC   Delete   File
  Quit holdings   ? Help   Exit
```

Predictions

Notice that the system cannot predict expected dates since the Auto Prediction flag is turned off. The bottom portion of the screen repeats the information supplied in fields 1 and 2.

```
                 Online Catalogue PUBLICATION PATTERN PREDICTIONS
Local Control #:  10008609                    (1 of 5 Publication Patterns)
Title     : The Chronicle of higher education
Author    : Editorial Projects for Education, Inc.
Publisher : Chronicle of higher education, etc.] 1966
Publication Type: ISS - Paper                              ** ACTIVE **

 1. Start Enumeration/Chronology:
    Vol.  : 77        (Month): JAN
    No.   : 1
    (Year) : 1998
 2. Start Date  : 01/20/98    4. Receipt Delay: 0
 3. Prediction #:  1         5. Claim Delay  : 60

 Expected   Enumeration                        Chronology
 Date       Vol.:No.                           (Year):(Month)
 01-20-98   77:1                               1998:JAN
 01-20-98   77:1                               1998:JAN
 01-20-98   77:1                               1998:JAN
 01-20-98   77:1                               1998:JAN
Options:
  # line    Line by line   Accept   Forward   Quit holdings   ? Help   Exit
```

Continuous Numbering with Calendar Change

This pattern illustrates a monthly publication with 2 Vol.s per year. The No. level increases continually and it is not restarted each Vol. The *Numbering Code* is C and the *Number of Parts* is set to 6 because the volume numbering still needs to be incremented every 6 No's. To force the Vol. to increment in June and December, the Calendar Change field is set to 06,12. This tells the system to automatically increment the Vol. level when a prediction is made for these months.

Publication Pattern

```
                 Online Catalogue PUBLICATION PATTERN DETAIL
Local Control #:  10008609                    (1 of 5 Publication Patterns)
Title      : The Chronicle of higher education
Author     : Editorial Projects for Education, Inc.
Publisher  : Chronicle of higher education, etc.] 1966
Publication Type: ISS - Paper                                 ** ACTIVE **
 1. Enumeration      Level 1     Level 2     Level 3    Level 4  Level 5 Level 6
    Caption/Label  : Vol.        No.
    Number of Parts :            6
    Numbering Code  :            C
 2. Chronology       Level 1     Level 2     Level 3    Level 4
    Caption/Label  : (Date)
    Code           : D
 3. Copy Caption    :
 4. Ind/Supp Caption:                              Associated Level:
 5. Frequency Code  : m -Monthly               6. Auto Prediction : Y
 7. Regularity Pattern: M - Monthly
    JA  FE  MR  AP  MA  JN  JL  AU  SE  OC  NO  DE
    1   1   1   1   1   1   1   1   1   1   1   1
    First Issue: 1  Days btn Issues: 0  Base Level: 2  Calendar Change: 06,12
 8. Date Range      :
Options:
  # line   Line by line   Second screen   Predictions   MARC   Delete   File
  Quit holdings  ? Help   Exit
```

Predictions

```
              Online Catalogue PUBLICATION PATTERN PREDICTIONS
Local Control #:  10008609                    (1 of 5 Publication Patterns)
Title     : The Chronicle of higher education
Author    : Editorial Projects for Education, Inc.
Publisher : Chronicle of higher education, etc.] 1966
Publication Type: ISS - Paper                              ** ACTIVE **

 1. Start Enumeration/Chronology:
    Vol.  : 98
    No.   : 4
    (Date) : 04/01/98
 2. Start Date  : 04/01/98    4. Receipt Delay: 0
 3. Prediction #: 1           5. Claim Delay  : 15

 Expected  Enumeration                      Chronology
 Date      Vol.:No.                         (Date)
 04-01-98  98:4                             04/01/98
 05-01-98  98:5                             05/01/98
 06-01-98  99:6                             06/01/98
 07-01-98  99:7                             07/01/98
Options:
  # line   Line by line   Accept   Forward   Quit holdings   ? Help   Exit
```

The following additional predictions illustrate the pattern more completely.

```
 Expected  Enumeration                      Chronology
 Date      Vol.:No.                         (Date)
 04-01-98  98:4                             04/01/98
 05-01-98  98:5                             05/01/98
 06-01-98  99:6                             06/01/98
 07-01-98  99:7                             07/01/98
 08-01-98  99:8                             08/01/98
 09-01-98  99:9                             09/01/98
 10-01-98  99:10                            10/01/98
 11-01-98  99:11                            11/01/98
 12-01-98  100:12                           12/01/98
 01-01-99  100:13                           01/01/99
```

Parts Summary

Parts screens display for multipart and serial titles. Parts screens are not used for single-part titles.

Parts information is stored on the parts records.

The Parts Detail screen is used to define one of the numbered parts of a multi-volume set or one of the numbered parts of a serial. Parts records link to Publication Pattern records and obtain caption information from it. Parts Detail records also include type of holding, status, barcode and note information.

The Parts Summary screen lists all the parts for a title. The summary screen displays the part number, type of holding and format information.

The Parts Summary display differs depending where you access it from and this also affects the information that is displayed. For example, you can display parts for a specific location, or a specific type of holding, or you can display all the parts for all locations and all types of holdings.

Sequencing Parts

You can re-order parts only within a specific type of holding and only by selecting the *Parts* option from the Type of Holding Detail screen. That is, you can change the order of issues, or supplements, or indexes but you can not interfile them.

Parts Summary Screen

```
          PARTS SUMMARY                                   MASTER

LCN     :10008609   Call #: UNC                    ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055

     Part Number          Type of Holding
     -----------          ---------------
 6.  Vol.45:No.4(DEC:08:1  Paper - ISS
     998)
 7.  Vol.45:No.3(JUN:24:1  Paper - ISS
     998)
 8.  Vol.45:No.2(JUN:10:1  Paper - ISS
     998)
 9.  Vol.45:No.1(MAY:27:1  Paper - ISS
     998)
10.  Vol.44:No.26(MAY:13:  Paper - ISS
     1998)

126 item(s) in list
Options:
 # item   Insert at line #   Delete item(s)   Go to   Forward   Backward
 Limit list   Quit holdings   ? Help   Exit
```

Bibliographic Information

The information at the top of the screen is provided by the system and is not user definable.

Column Headings

Column headings are defined on the HOLDINGS DISPLAY DEFINITION (HDD) menu which is available from the HOLDING SETUP MENU (CHSM) in the Cataloguing Module.

Screen Content

User definable on the HOLDINGS DISPLAY DEFINITION (HDD) menu which is available from the HOLDING SETUP MENU (CHSM) in the Cataloguing Module.

Each numbered line represents one part record.

Options

# item	Accesses the field specified.
Insert at line #	Allows you to create a new part. When you select the *Insert at line #* the system displays the PARTS DETAIL screen. Normally, you want the list of numbered parts to appear in descending order. Most of the time, you will insert the new part at line 1.
Delete item(s)	Removes the specified items.
Go to	Provides access to other Holdings edit screens.
Forward	Browses forward to the next screen of information.
Backward	Browses backward to the next screen of information.
Limit list	Allows you to restrict the items displayed to those that contain the search criteria you specify (search criteria must appear on the screen).
Quit holdings	Exit holdings and do not save changes.
? Help	Displays library-specific help for the screen.
Exit	Exit the screen without saving changes.

Parts Summary from the Pieces Detail Screen

To access this screen enter ?? in the *Volume/Part#* field on the Pieces Detail screen. This screen lists all the parts that are linked to this barcode (piece).

```
          LINKED PARTS                               MASTER

LCN     :10008609   Call #: UNC                  ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055

     Part Number          Type of Holding
     -----------          ---------------
 1.  Vol.44:No.15(DEC:12:  Paper - ISS
     1997)
 2.  Vol.44:No.14(DEC:05:  Paper - ISS
     1997)
 3.  Vol.44:No.13(NOV:28:  Paper - ISS
     1997)
 4.  Vol.44:No.12(NOV:21:  Paper - ISS
     1997)
 5.  Vol.44:No.11(NOV:14:  Paper - ISS
     1997)

11 item(s) in list
Options:
 # item   Link   Unlink item(s)   Accept   Forward   Limit list
 Quit holdings   ? Help   Exit
```

Parts Summary from Type of Holding Detail screen

Access this screen by selecting the *Parts* option from the Type of Holding Detail screen.

This screen lists only the parts belonging to a specific type of holding, for example, all issues, or all supplements.

```
          PARTS SUMMARY                              MASTER

LCN     :10008609  Call #: UNC                 ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+    LCCN: sf 80001055

     Part Number          Type of Holding
     -----------          --------------
 1.  Vol.44:No.17(JAN:09:  Paper - ISS
     1998)
 2.  Vol.44:No.16(JAN:02:  Paper - ISS
     1998)
 3.  Vol.44:No.15(DEC:12:  Paper - ISS
     1997)
 4.  Vol.44:No.14(DEC:05:  Paper - ISS
     1997)
 5.  Vol.44:No.13(NOV:28:  Paper - ISS
     1997)

18 item(s) in list
Options:
 Sequence parts   Move #(s)   # item   Insert at line #   Forward
 Limit list   Quit holdings   ? Help   Exit
```

Pieces/Parts Summary from Location Detail

Access this screen by selecting the Pieces/Parts option from the Location Detail screen. Only the parts at this specific location are shown. These parts may include any type of holding (issue, supplement, or index) and may be barcoded.

```
              Online Catalogue PIECES / PARTS SUMMARY

 LCN     :10008609   Call #: UNC                        ISSN: 0009-5982
 Title   :The Chronicle of higher education
 Imprint :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055

      Part number/Bound label      Status              Barcoded
      ----------------------       ------              --------
  1.  Vol.44:No.17(JAN:09:1998)    Exp issue           N
  2.  Vol.44:No.16(JAN:02:1998)    Received            N
  3.  Vol.44:No.15(DEC:12:1997)    Received            N
  4.  Vol.44:No.14(DEC:05:1997)    Received            N
  5.  Vol.44:No.13(NOV:28:1997)    Received            N
  6.  Vol.44:No.12(NOV:21:1997)    Received            N
  7.  Vol.44:No.11(NOV:14:1997)    Received            N
  8.  Vol.44:No.10(NOV:07:1997)    Received            N
  9.  Vol.44:No.9(OCT:31:1997)     Received            N
 10.  Vol.44:No.8(OCT:24:1997)     Received            N


 18 item(s) in list
 Options:
  # item   Delete item(s)   Move #(s)   Forward   Limit list   Quit holdings
  ? Help   Exit
```

Parts Detail Screen

```
          PARTS DETAIL                                    MASTER

LCN      :10008609   Call #: UNC                      ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055


 PARTS key :  10003630
1. Type of Holding     : Paper          8. Title        :
2. Publication Pattern : Vol.:No.:(Mont 9. Copyright Fee :
3. Enumeration/Chronology :            10. Gregorian Year:
   Vol.  : 44       (Day)  : 05
   No.   : 14       (Year) : 1997
   (Month): DEC
4. Alternate Enumeration/Chronology :

5. Status : Received   3/4 ; Bound      1/4 ;  - 01/26/98
6. Barcode:
7. Nonpublic notes:

Options:
 # line   Line by line   File   Delete   Quit holdings   ? Help   Exit
```

Bibliographic Information

The information at the top of the screen is provided by the system and is not user definable.

Edit Fields

1.Type of Holding   [C or ??]

    C   Allows you to edit the current Type of Holding definition.

    ??   Only available for new parts. Displays the TYPE OF HOLDING SUMMARY screen. From this screen you can retrieve an existing Type of Holding definition or use the *Add item* option to create a new definition.

2. Publication Pattern   [?? or C]

Contains the captions for the part's publication pattern.

	??	Displays the PUBLICATION PATTERN SUMMARY screen which lists all the existing publication patterns already defined for the type of holding defined in field 1. Select a publication pattern or use the *Add item* option to create a new definition.
	C	Allows you to edit the current Publication Pattern definition.

3. Enumeration/ Chronology	[Enter the numbering.] Displays the labels for all ten Enumeration and Chronology fields. You cannot change the labels from this field, you can only change them by editing the PUBLICATION PATTERN record. Corresponds to subfields a-f, i-l of the USMARC 863/4/5 fields.
4. Alternate Enumeration/ Chronology	[Enter the numbering.] Displays the labels for all three Alternate Enumeration and Chronology fields. You cannot change the labels from this field, you can only change them by editing the PUBLICATION PATTERN record. Corresponds to subfields g-h, m of the USMARC 863/4/5 fields.
5. Status	Opens an additional window. See *Current Location Window* on page 7-102
6. Barcode	Opens an additional window. See *Current Location Window* on page 7-102
7. Nonpublic notes	Opens an additional window. See *Current Location Window* on page 7-102. Corresponds to subfield x of the USMARC 863/4/5 fields.
8. Title	[text, 14 characters +] Enter a title for the part. Title is displayed on the Parts Summary screen, for example, Spring Book Announcement. Corresponds to subfield o of the USMARC 863/4/5 fields.
9. Copyright Fee	[14 characters] Enter the copyright article fee code as defined in the 018 field. This field contains the unique identification code for component parts appearing in monographs and serials. For a complete description see the USMARC

Bibliographic manual, tag 018. Corresponds to subfield s of the USMARC 863/4/5 fields. Exported in the 852 $s.

10. Gregorian Year	[14 characters]

This information is not used by the system. Enter the converted Gregorian year, if necessary. Corresponds to subfield n of the USMARC 863/4/5 fields.

Options

# line	Accesses the field specified.
Line by line	Accesses all numbered fields.
File	Saves changes to the record and files them into the database.
Delete	Deletes the current part.
Quit holdings	Exit holdings and do not save changes.
? Help	Provides access to a Library-defined help screen.
Exit	Exit the screen without saving changes.

Current Location
Window

```
                    Online Catalogue PARTS DETAIL
Local Control #:  10009052                        Format  : SE
Title      : Ancient Mesoamerica
Author     :
Publisher  : Cambridge University Press, 1990

 PART NUMBERING: Vol.8:No.1(1997:Spring)
 .-----------------------------------------------------------------------------.
 |   CURRENT LOCATION   STATUS          DATE      BARCODE           NOTES |
 | 1 AL CENTRAL         1 - Received    01/22/98                      N  |
 |   GENERAL F1434 ...                                                   |
 |                                                                      |
 |                                                                      |
 |                                                                      |
 |                                                                      |
 |                                                                      |
 |                                                                      |
 |                                                                      |
 |                                                                      |
 .-----------------------------------------------------------------------------.
Vendor: JW&S     PO#: 971000001/0001   Routed: N  Type: FIRMORD-S
Copy Set Notes: Received on open-ended firm order
```

Edit and Display Fields

Current Location   [Display only or blank]

Displays the location where the title is held. Use the *Location add* option if this field is blank or if you want to add a new location. The system displays a list of existing location copy records. If the location you want is listed, use the # line(s) option to add the location into the CURRENT LOCATION WINDOW display. If you need to add a new LOCATION COPY record, you must go to the LOCATION COPY DETAIL screen to create a new record. NOTE: When you edit this screen, the system displays copy set information at the bottom of the screen which includes the Vendor Code, PO#, whether the part is routed, the Order Type (from Acquisitions), and Copy Set Notes.

Status   [Default displayed or ?? to select from a list]

You must accept the default or select an existing status from the displayed list.

Date	System supplied. You can only edit this field if this is the next expected date.
Barcode	[21 characters]
	Enter a barcode. The system supplies this information if a piece record exists.
Notes	[Y or N]
N	Prompt returns to the option line.
Y	A new window opens that allows you to add notes. See *Notes Screen* on page 7-104.
Options	Refers to options on Current Location Window
# line	Accesses the line specified.
Line by line	Accesses all numbered fields.
Location add	Displays the LOCATION COPY SELECTION screen from which you can select a location.
Column by column	Allows you to update the Status column, the Date (only if next expected), Barcode and Notes column.
Accept	Saves your changes (if any) and exits the screen.
Add barcodes	Allows you to edit the barcode information.
Notes update	Positions you at the Notes column if you type Y or if you are at a field marked Y and <Enter>, the notes screen appears.
Forward	Browses forward to the next screen of information.
Backward	Browses backward to the next screen of information.
? Help	Displays library-specific help for the screen.
Exit	Exit the screen without saving changes.

Notes Screen

This screen appears when the *Notes* field is entered from the Current Location screen or when the *Notes update* option is selected. It allows you to enter notes about the specific part at the specific location.

```
              PARTS DETAIL                                    MASTER

 LCN      :10008609   Call #: UNC                    ISSN: 0009-5982
 Title    :The Chronicle of higher education
 Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055


 Current Location : AL CENTRAL GENERAL c.3
 1. Public note   : This issue on reserve March 15 - March 30.



 2. Nonpublic note: Route to bindery Oct. 15.



 3. Physical cond.: Front cover repaired.


 Options:
  # line   Line by line   Accept   Quit holdings   ? Help   Exit
```

Edit Fields

1. Public note   [text]

An additional window can be opened from this field. Corresponds to subfield z of the USMARC 863/4/5 fields.

2. Nonpublic note   [text]

An additional window can be opened from this field. Corresponds to subfield x of the USMARC 863/4/5 fields.

3. Physical cond.   [text]

An additional window can be opened from this field. Corresponds to subfield q of the USMARC 863/4/5 fields.

Options

# line	Accesses the field specified.
Line by line	Accesses all numbered fields.
Accept	Saves your changes (if any) and exits the screen.
Quit holdings	Exit holdings and do not save changes.
? Help	Provides access to a Library-defined help screen.
Exit	Exit the screen without saving changes.

Copy Set Summary

To access the SERIAL COPY SET SUMMARY screen select the *Serial copy display* option from Holdings edit.

This screen displays all the copy sets for the title. Copy sets are listed in descending order; the most recently created set is displayed last in the list.

Adding Copy Sets

Copy sets must be associated with at least one Type of Holding record in order to checkin copy sets. This association allows you to define what is to be predicted for each copy set. One subscription might include issues and indexes but another might only include the issues.

Deleting Copy Sets

Copy sets can be deleted from the location copy record only. You cannot delete them directly from the serial copy set screens.

Order Created In Acquisitions

If a serial is ordered in Acquisitions, the Acquisitions transfer to catalogue process automatically creates a copy set for each ordered copy.

Order Renewal in Acquisitions

Although a serial's order can be renewed in Acquisitions with a new unit cost, ship to address, etc., the corresponding copy set fields are not automatically updated in Serials.

Vendor Change in Acquisitions

A serial's order vendor can be changed in Acquisitions. If you assign a new PO number at that time, the copy set's *CURRENT PO#* field is updated immediately in Serials.

When Acquisitions staff change a vendor, they must specify when the copy set's *VENDOR CODE* field should be updated in Serials, and whether or not outstanding claims should be reissued to the new vendor, i.e. have their *VENDOR* field changed. The Serial Claim Generation job (SCC) performs both tasks at the same time.

```
              SERIAL COPY SET SUMMARY                      MASTER

 LCN     :10008609  Call #: UNC                      ISSN: 0009-5982
 Title   :The Chronicle of higher education
 Imprint :[Washington, etc., Chronicle of higher e+    LCCN: sf 80001055


     Campus    Library    Collection/Call Number           Copy #
     --------  --------   --------------------------------- -----
 1.  ADVLIB    Central    GENERAL                           1
 2.  ADVLIB    Central    GENERAL                           2
 3.  ADVLIB    Central    GENERAL                           3
 4.  ADVLIB    Central    GENERAL                           4




 4 item(s) in list
 Options:
  # item   Add item   Go to   MARC   Limit list   Quit holdings   ? Help
  Exit
```

Bibliographic Information

The information at the top of the screen is provided by the system and is not user definable.

Column Headings

Column headings are defined on the HOLDINGS DISPLAY DEFINITION (HDD) menu which is available from the HOLDING SETUP MENU (CHSM) in the Cataloguing Module.

Screen Content

User definable on the HOLDINGS DISPLAY DEFINITION (HDD) menu which is available from the HOLDING SETUP MENU (CHSM) in the Cataloguing Module.

Each numbered line represents one copy set.

Options

When you select the *# item* or *Add item* option the SERIAL COPY SET DETAIL screen appears. The SERIAL COPY SET DETAIL screen links the copy set record to the location copy record.

 # item   Accesses the field specified.

Add item   Accesses a Detail screen template which allows you to add another Copy Set record.

Go to   Provides access to other Holdings edit screens.

MARC   Displays the MARC record for this title.

Limit list   Allows you to restrict the items displayed to those that contain the search criteria you specify (search criteria must appear on the screen).

Quit holdings   Exit holdings and do not save changes.

? Help   Displays library-specific help for the screen.

Exit   Exit the screen without saving changes.

Serial Copy Set Detail

```
              SERIAL COPY SET DETAIL                      MASTER

 LCN     :10008609   Call #: UNC                  ISSN: 0009-5982
 Title   :The Chronicle of higher education
 Imprint :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055


  1. Location    : AL CENTRAL GENERAL c.1
  2. Status      : ACTIVE - Y  Outstanding Claims
  3. Current PO# :
  4. Actual Cost :
  5. Vendor Code : FAXON
  6. Ship To     : UNIT5
  7. Clm Code    : 21day
  8. Routing ID  : P91000170
  9. Notes       : Purchase copy




 Options:
  # line   Line by line   Routing list   Binding list   Type of holdings
  File   Quit holdings   ? Help   Exit
```

Edit Fields

Required   The *Location* field is mandatory.

System Provided   If the copy was created by the Acquisitions to catalogue transfer process, default information is provided for most of the fields. These fields, except for CURRENT PO#, can still be edited.

1. Location   [?? or C]

Current location information: institution, sublocation, collection, call # prefix, call number, call # suffix and copy number.

??   Displays the LOCATION COPY SUMMARY screen which shows all the location-copy records already created for this title that are not already linked to active copy sets. Use the *Retrieve #* option to select one of these locations, or use the *Add item* option to create a new location.

C	Displays the LOCATION COPY DETAIL screen and allows you to change location information. See *Location Copy Records* on page 7-21.

2. Status [Y or N]

The default for a new copy set is N.

Y	Enter Y if you expect new issues of the serial to be arriving for this copy set.
N	Enter N if you do not expect new issues for this copy set (you are no longer receiving it).

Claims If there are any active claims for copies in this copy set, the system displays the message Outstanding Claims to the right of this field.

Transfer When the transfer from Acquisitions is done, sets this field to Y.

3. Current PO# [20 characters]

Purchase order number and perhaps also the order line number (separated by a slash) for the copy set. The value is shown in the *PO#/ITEM* column of the CHKM–ORDER SUMMARY DISPLAY screen, and the *ORDER#* field of the CHKM–CLAIM DETAILED DISPLAY screen (see *Claims*).

System Provided When the transfer from Acquisitions is done the system provides this field's value from the *PO#/LINE#* field of the ORD–ORDERING DATA screen.

4. Actual Cost [12 digits, a decimal point, 2 digits]

Cost of the copy set in base currency. If you do not enter a decimal point, the system provides a .00 at the end of your value.

System Provided When the transfer from Acquisitions is done the system provides this field's value from the *UNIT COST* field of the ORD – ORDERING DATA screen — after converting that amount from the order currency to the library's base currency, if necessary.

5. Vendor Code [8+ character code, ??, or N=vendor name search]

Vendor Code for the vendor supplying the copy set. Use the CODE field on the VEN – VENDOR HEADER SCREEN to define a vendor code.

Claim letters for copies in this copy set will be addressed to this vendor. The value is shown in the VENDOR field of the CHKM – CLAIM DETAILED DISPLAY screen.

??	Allows you to browse a list of vendors.
N=(vendor name)	Allows you to search a vendor by name or to view a list of names that are alphabetically close.

NOTE: If you change the Vendor Code and then *File* the screen, the system asks you whether you want outstanding claims reissued to the new vendor.

System Provided — When the transfer from Acquisitions is done, the system provides this field's value from the *VENDOR* field of the ORD – ORDERING DATA screen.

If the Transfer provides this field's value, the value is also shown in the *VENDOR* field of the CHKM – ORDER DETAILED DISPLAY screen and the CHKM – INVOICE DETAILED DISPLAY screen. Only the vendors for orders transferred from Acquisitions are indexed.

NOTE: If Acquisitions staff change the purchase order's vendor, the Serials Claim Generation job changes it here too, on the date the Acquisitions staff specify.

6. Ship To — [6 character code – Required field if *STATUS* is *ACTIVE*]

Ship To Code for the copy set – a shipping address for libraries using decentralized receipt of materials. Use the SHPTO – Shipto Codes table on the SERIAL CONTROL CODE TABLE MENU (CODM). Claim letters for copies in this copy set will include the address defined for this code.

System Provided — When the transfer from Acquisitions is done, the system provides this field's value from the copy set's *SHIP TO* field at the ORD – ALLOCATIONS screen.

7. Clm Code — [6 character code]

Claim Code for the copy set.

The system automatically determines action dates for claim letters in a cycle based on the periods defined for the Claim Code in a setup table (CLMCD).

The system can also change a copy' status from `Claimed` to `Missing` at the end of the claim cycle.

If a code is not entered in this field, the system cannot autogenerate claims for the copy set.

System Provided   When the transfer from Acquisitions is done, the system provides the field's value from the *CLM CODE* field of the ORD – ORDERING DATA screen.

---

8. Routing ID   [13 character code]

Routing ID Code for the copy set, specifying a list of patrons for the Routing Slip that is printed whenever a copy is Received. The value is shown in the ID column of a patron's *RTEM – RECIPIENT TITLES DISPLAY* screen.

If a code is not entered in this field, the system does not print a Routing Slip for copies when they are checked in. (See *Routing List* on page 7-113.)

There are two types of Routing ID Codes:

- library-defined, indexed codes for standard, centrally-maintained patron lists
- system-assigned, non-indexed codes for private (copy set specific) patron lists — these are numeric codes that begin with a "P".

The system does not provide a value for this field when the transfer from Acquisitions is done.

---

9. NOTES   [window available]

Copy set note which is displayed on the CHKM – COPY SET NOTES DISPLAY screen and at the bottom of the screen on the CURRENT LOCATION WINDOW when you are checking in parts. The note can also be printed on Routing Slips, depending on how the slip has been defined (see the *Serials Management Guide*).

System Provided   When the transfer from Acquisitions is done, the system provides this field's value from the *PROCESS'G NOTE* field of the ORD – NOTES SCREEN.

Options

# line	Accesses the field specified.
Line by line	Accesses all numbered fields.
Routing list	Displays the ROUTING LIST screen from which you can define a list of recipients.
Binding list	Displays the BINDING LIST screen. All parts for this copy set that have a status of Received or In Bindery are displayed.
Type of holdings	Displays the LINKED TYPE OF HOLDING screen. From this screen you can link or unlink Type of Holdings records to the copy set.
File	Saves changes to the record and files them into the database.
Quit holdings	Exit holdings and do not save changes.
? Help	Displays library-specific help for the screen.
Exit	Exit the screen without saving changes.

Routing List

Access   Select the *Routing list* option from the SERIAL COPY SET DETAIL screen.

When this option is selected, the system shows a list of all the patrons who copies of this copy set will be circulated to.

A routing slip is generated every time the copy set is received at the Checkin Screen.

```
              ROUTING LIST                              MASTER

LCN      :10008609   Call #: UNC                    ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

    PATRON BARCODE/ROUTING ID NAME                  LOCATION
 1  -000775                   Unit 3               LC Unit 3
 2
 3
 4
 5
 6
 7
 8
 9
10
11
12

Options:
 Insert at line #   Delete line #   Move    File    Forward   Backward
 # line    Line by line   ? Help    Exit
```

A routing list is identified by its Routing ID Code. There are two types of codes (for the two types of lists):

• library-defined, indexed codes for standard, centrally-maintained lists.

• system-assigned, non-indexed code for private (copy set specific) lists – these are numeric codes that begin with a "P".

In the sample shown, the standard Routing ID P91000170 has been assigned to the copy set at the *ROUTING ID* field on the SERIAL COPY SET DETAIL screen. When you make any changes to a standard list and file those changes, the list is saved as a private list and the system assigns it a "P" code in the *ROUTING ID* field. To change the existing list or create a new list use the RADD – Add/Update Standard Routing IDs screen on the Routing Menu (RTEM).

To see the list of available patrons, enter ?? at the *PATRON BARCODE* field. The patrons listed have their *Rte. Recipient* field set to Y at the Circulation PATRON REGISTRATION screen. The value in their *Rte. Location* field (on the PATRON REGISTRATION screen) is shown in the LOCATION column.

To see the list of available standard routing lists, enter `s?` at the *PATRON BARCODE* field. Choosing one of the standard routing IDs from this list adds all the patrons from the chosen routing list into the current routing list. Duplicate patrons are not added.

Binding List

Access   Select the *Binding list* option from the SERIAL COPY SET DETAIL screen.

The screen provides a convenient way of changing the status of several copies from `Received` to `In Bindery`, and from `In Bindery` to `Bound`.

Only one copy set's `Received` and `In Bindery` issues are listed on the screen; copies with other statuses, such as `Missing` or `Claimed`, are omitted. For a description of the ENUMERATION, CHRONOLOGY, and STATUS column see the *Parts Detail Screen* on page 7-99.

```
          BINDING LIST                                   MASTER

LCN     :10008609  Call #: UNC                      ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+    LCCN: sf 80001055
CAMPUS  :ADVLIB                    LIBRARY: CENTRAL    COPY #: 2

     Enumeration/Chronology                       Status    In Bindery

  1. Vol.44:No.16(JAN:02:1998)                     Received      N
  2. Vol.44:No.15(DEC:12:1997)                     Received      N
  3. Vol.44:No.14(DEC:05:1997)                     Received      N
  4. Vol.44:No.13(NOV:28:1997)                     Received      N
  5. Vol.44:No.12(NOV:21:1997)                     Received      N
  6. Vol.44:No.11(NOV:14:1997)                     Received      N
  7. Vol.44:No.10(NOV:07:1997)                     Received      N
  8. Vol.44:No.9(OCT:31:1997)                      Received      N
  9. Vol.44:No.6(OCT:10:1997)                      Received      N
 10. Vol.44:No.4(SEP:26:1997)                      Received      N
 11. Vol.44:No.3(SEP:19:1997)                      Received      N
Options:
 Forward   Backward   Update   File   Quit holdings  ? Help   Exit
```

Select the *Update* option to access the binding flags in the *In Bindery* column. To change a copy's status from `Received` to `In Bindery`, change the flag from N to Y. To change a copy's status from *In Bindery* to

Bound, change the value from Y to N and the copy will be removed from the list when you *File* the screen.

Type of Holdings

Access   Select the *Type of Holding* option from the SERIAL COPY SET DETAIL screen.

This option links the Type of Holding with specific copy sets. Every copy set must be linked to at least one type of holding record if you want to checkin the copy set.

If you expect both issues and indexes with this copy set, link the type of holdings records for issues and indexes to the copy set.

```
          LINKED TYPE OF HOLDING                     MASTER

LCN     :10008609   Call #: UNC                  ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055

     Description                    Type  Supplement/Index type
     -----------                    ----  --------------------
 1.  Paper                          ISS
     Captions/Labels: Vol.:No.:(Month):(Day):(Year)




1 item(s) in list
Options:
 # item   Link   Unlink item(s)   Next expected item   File   Limit list
 Quit holdings   ? Help   Exit
```

Specifying Next Expected Issues

When a copy set is active, the *Next expected item* option appears on the LINKED TYPE OF HOLDING screen. You can predict the next expected item for each SHIPTO and each Type of Holding. For example, in the following table you can assign a different next expected date, receipt delay, and claim delay to each of the ten copy sets.

Type of Holding	SHIPTO Code	Copy Set Number (SCPY)
Issues	Main	SCPY1
		SCPY2
	Branch1	SCPY3
	Branch2	SCPY4
Indexes	Main	SCPY5
	Branch1	SCPY6
	Branch2	SCPY7
Supplements	Main	SCPY8
	Branch1	SCPY9
	Branch2	SCPY10

```
              LINKED TYPE OF HOLDING                        MASTER

LCN    :10008609  Call #: UNC                        ISSN: 0009-5982
Title  :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

     Description                      Type  Supplement/Index type
     -----------                      ----  --------------------
 1.  Paper                           ISS
     Captions/Labels: Vol.:No.:(Month):(Day):(Year)




1 item(s) in list
Options:
 # item   Link   Unlink item(s)   Next expected item   File   Limit list
 Quit holdings   ? Help   Exit
```

1. From the LINKED TYPE OF HOLDING screen select the *Next
    expected item* option and enter the line number, 1. The PUBLICA-
    TION PATTERN PREDICTIONS screen appears.

```
           PUBLICATION PATTERN PREDICTIONS                 MASTER

LCN    :10008609   Call #: UNC                       ISSN: 0009-5982
Title  :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055


1. Start Enumeration/Chronology:
   Vol.  : 44       (Day) : 09
   No.   : 17       (Year) : 1998
   (Month): JAN
2. Start Date  : 01/09/98    4. Receipt Delay: 0
3. Prediction #: 2           5. Claim Delay  : 4

Expected  Enumeration                     Chronology
Date      Vol.:No.                        (Month):(Day):(Year)
01-09-98  44:17                           JAN:09:1998
01-16-98  44:18                           JAN:16:1998
01-23-98  44:19                           JAN:23:1998
01-30-98  44:20                           JAN:30:1998
Options:
 # line   Line by line   Accept   Forward   Quit holdings   ? Help   Exit
```

2. Predictions can be changed by selecting the *Start Enumeration/ Chronology* field and editing the information. In this example, if you know that Vol.44, no.17 will not be published you can edit the record to update the volume number to 18 and change the date. The system automatically re-calculates the predictions for later expected issues.

```
            PUBLICATION PATTERN PREDICTIONS                MASTER

 LCN      :10008609   Call #: UNC                  ISSN: 0009-5982
 Title    :The Chronicle of higher education
 Imprint  :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055


 1. Start Enumeration/Chronology:
    Vol.   : 44        (Day)  : 17
    No.    : 18        (Year) : 1998
    (Month): JAN
 2. Start Date  : 01/09/98     4. Receipt Delay: 0
 3. Prediction #: 2            5. Claim Delay  : 4

 Expected  Enumeration                    Chronology
 Date      Vol.:No.                       (Month):(Day):(Year)
 01-09-98  44:18                          JAN:17:1998
 01-16-98  44:19                          JAN:16:1998
 01-23-98  44:20                          JAN:23:1998
 01-30-98  44:21                          JAN:30:1998
 Options:
  # line   Line by line   Accept   Forward   Quit holdings   ? Help   Exit
```

3. Edit the *Prediction #* field only if this is a month, season, or user-defined pattern and there is more than one part received in the month. In this case, the Prediction number should correspond to the number of the part received. For example, if the part described in field 1 is the second part received in the month, enter 2; if the part described in field 1 is the third part received in the month, enter 3.

You cannot edit the expected dates for issues other than the issue displayed in the first field. If you do edit any other issue, the system assumes it is the next expected issue and it appears as the first issue displayed in the list of predictions. To change future expected dates, use the *Retrieve #* option from the CHECKIN screen. (In this example, FEB was changed to JAN for Vol. 44, No. 20.)

4. Edit the receipt and claim delays for the expected issue, if necessary. (Use the *Forward* option to see future predictions and to verify that the receipt delay is correct.)

   In the *Receipt Delay* field enter the approximate number of days after the predicted publication date that receipt of the issue is expected. Use a minus sign if issues are expected before the publication date.

5. When you are finished updating the numbered fields, the system repaints the bottom of the screen starting with the first issue expected (defined in the numbered fields) and predicts the next three issues. *Exit.*

NOTE: The *Start Enumeration/Chronology* field is common to all SHIPTO locations for this title. You should not have to update this field. The *Start Date, Prediction #, Receipt delay, and Claim delay fields* are specific to this SHIPTO.

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A

Using ADVANCE

This appendix provides some general instructions on how to use ADVANCE:

- the parts of a screen
- selecting menu items
- selecting screen options
- editing in data fields
- editing in data field windows.

The Parts of a Screen

The ADVANCE screens follow a common design, as illustrated in the following sample menu — the ADVANCE MASTER MENU.

Menu Screens

Each menu screen typically has:

- the **software name** (Geac ADVANCE Library System) and **release number** (RRRR, e.g. 5.00), and your **library system name** (Your Library Name), at the top centre of the screen

- the **date** (DD MMM YYYY) and **time** (HH:MM), in the top left corner of the screen

- the terminal's **Port Code** (PPPPP)and default **Institution Code** (IIIIII), in the top right corner of the screen

- a **screen title** (e.g. MASTER MENU), four lines down in the centre of the screen

- an **information display** or **work area**, in the middle of the screen

- an **options area** for entering a menu option, at the very bottom of the screen.

```
DD MMM YYYY            Geac ADVANCE Library System (RRRR)        PPPPPP  IIIIII
   HH:MM                       Your Library Name

                              MASTER MENU



        1. CAT   Cataloguing              4. ACQ   Acquisitions

        2. CIRC  Circulation              5. SER   Serials Control

        3. OPAC  Online Catalogue         6. UTIL  Utilities

                        7. ON    Change User

                        8. OFF   Log Off




        Enter the number of your selection and press <ENTER>
              or  ?  followed by <ENTER> for Help :
```

Non-Menu Screens

Most non-menu screens lack the information shown in the top three lines of menu screens, and list the options across the bottom of the screen. A sample ordering screen from Acquisitions is shown below.

The operator's **User ID** (UUUUUU) is shown in the top right corner of many screens.

```
          ORD - ORDERING DATA                        UUUUUU

PO#/LINE#: 9200000314/0001    VENDOR   : PENGUIN    ORDER DATE: 02/08/93
REQUEST #: 920123             ORDER TYPE: REGULAR   REQST DATE: 02/08/93
LIBRARY  : UL                 CONDITION : OPEN       EST DELVRY: 02/22/93
ISBN/ISSN: 0898598125         LC CARD # :   85029331  RECEIVED  :
AUTHOR   : Buss, Arnold H.,  1924-
TITLE    : SOCIAL BEHAVIOR AND PERSONALITY.


STATUS   : Rush Order

 1. VENDOR   : PENGUIN    6. SELECTOR : ACQ      10. UNIT COST:        46.50
 2. PAY TYPE : PAY        7. TOTAL CPY:  6       11. DISCOUNT%: 15.000
 3. TRANSFER : Y          8. PRIORITY : RUSH     12. TAX %    :  8.000
 4. CLM CODE : DFLT       9. CURRENCY : CDN      13. ADDED CHG:         0.00
 5. REQUESTOR: C. Smith                          14. CONDITION: OPEN
15. VENDOR   : Please supply ASAP
    NOTE     :


Options:    Description of selected option
  File   # line   Line by line   Bibliographic   Allocation   Notes   Status
  Conditions   Serial Publication   Vendor inquiry   Prior screen   ? Help
  Exit
```

Selecting Menu Items

The ADVANCE modules are menu-driven. Menu screens which list available sub-menus or functions are offered at the highest levels of the module. There are two ways to select a menu item.

Menu Item Number

To select a menu item, you may enter the item's reference number on the menu and <ENTER>. For example, to select the Serials Module on the ADVANCE MAIN MENU, enter the number 5 and <ENTER>; similarly, to select the Vendor Maintenance Menu on the SERIALS CONTROL MAIN MENU, enter the number 4 and <ENTER>.

Screen Identifiers

Each menu item also has a short alphabetic name, called a screen identifier. For example, the Publications Pattern Function, an item listed on the SERIALS CONTROL MAIN MENU, has the identifier PUBM. You can enter the identifier instead of the menu item number on this menu.

Furthermore, you do not have to be on the menu that lists the function when you enter the screen identifier — you can enter the screen identifiers on any menu in the module to go **directly** to the screen you want, skipping any intermediate menus.

Selecting Screen Options

Many non-menu screens have a list of options at the bottom. The way these options are presented depends on whether or not the "option bar" feature is turned on for your particular ADVANCE module (e.g. Serials) or your terminal's port. (This feature is controlled by the system administrator at a setup table — see the *Utilities Management Guide*.)

All sample screens in this guide show option lines with this feature turned on.

Option Bar

If the "option bar" feature is turned **on**, the option line will look something like the following, with one of the options highlighted and a brief description of it shown on the first line.

```
Options:    Get more information
 Check in   Holdings   Claims   Order detail   Forward   Backward
 Prior screen   ? help   Exit
```

To select an option:

1. move the highlighted bar in any of three ways:

   • press an arrow key

   • press the space bar

   • type the first (capitalized) letter of the option. If more than one option begins with the same letter, type the letter a second time to proceed to the second option.

2. and then <ENTER> to execute it.

Option Code

If the "option bar" feature is turned **off**, the option line will look something like the following, with a code (or "command") shown to the left of each option.

```
Options:                       <ENTER> = scroll options
 C = Check in   H = Holdings   CL= Claims        O = Order detail
 F = Forward    B = Backward   P = Prior screen  ? = ? help
```

To select and execute an option, enter the option's code and <ENTER>. For example, enter CL and <ENTER> for *Claims*.

Scrolling
If the system does not have enough room to list all options at once, you can <ENTER> to scroll forward in the list. For example, the previous sample display will change to:

```
Options:                        <ENTER> = scroll options
 F = Forward    B = Backward   P = Prior screen   ? = ? help
 E = Exit
```

and then to:

```
Options:                          <ENTER> = scroll options
 E = Exit
 C = Check in   H = Holdings   CL= Claims        O = Order detail
```

and then finally back to the original display.

Editing in Data Fields

Many screens have fields into which you can place the cursor to add or change data. These fields are usually the numbered fields.

Single-field Access

To access a particular field, select the *# line* option and type the field's reference number. Afterward, you can leave the field and return to the option line by <ENTER>.

Line-by-Line, Multi-field Access

To access all the screen's fields, one after another, instead select the *Line by line* option; this places the cursor in the screen's first field. <ENTER> takes you to the next field rather than down to the option line.

When you add a **new** record, the system displays a screen with most or all of the fields left blank and automatically puts you into line-by-line entry mode.

Commands

The commands you can use to edit text or display help within a field are described in the following table.

Use the Back Space key and type over existing text, or use the <ESC> commands, when necessary. Be careful about using **arrow keys** for this purpose because they work differently on different types of terminals.

NOTE: The library might have different commands defined for some functions, such as <ESC>OO rather than <ESC>O for the insert/over-type mode toggle. If necessary, ask your system manager or Geac Customer Support, who can check the ADV.DEFINE.CURSOR file.

Enter	Description
<ENTER>	To leave the current field as is and **proceed**, just <ENTER>. In line-by-line mode, the system places the cursor at the next field; otherwise, it places the cursor down at the option line.
(blank)	To leave the current field as is and send the cursor **down to the option line**, even in line-by-line mode, enter a blank at the beginning of the field and <ENTER>.
.	To leave the current field as is and **go back** one field, type a period at the beginning of the field and <ENTER>. In line-by-line mode, the system places the cursor back at the preceding field; otherwise, it places the cursor down at the option line.
#	To **clear** the current field and proceed, type a number sign at the beginning of the field and <ENTER>. In line-by-line mode, the system places the cursor at the next field; otherwise, it places the cursor down at the option line.
?	For library-defined **help** on the field, type a single question mark at the beginning of the field and <ENTER>.
??	At fields which take a setup code as the value, you can have the system display the **list of valid codes**. Type two question marks at the beginning of the field and <ENTER>.
	For example, typing ?? in the *CHRONOLOGY CODE* field of the PUBM - PUBLICATION PATTERN screen causes the system to superimpose the CHRONOLOGY CODE - (CHRN) table. If you wish, you can assign one of the listed Chronology Codes to the field by entering the code's reference number at this table before returning to the original screen.
<ESC>A	ErAse character under the cursor (the cursor moves to the left).
<ESC>B	Tab Backwards within the field.
<ESC>D	Delete character under the cursor (the cursor does not move).
<ESC>H	Go to the beginning of the field (Home).
<ESC>I	Insert (paste) text from your preceding deletion/capture in the field.
<ESC>L	Go to the end of the field.
<ESC>O	Toggle between insert and Overtype modes.

Enter	Description
<ESC>P	For some fields, the system can only show the first line of information stored in the field. (If there is more text than can be shown, the system displays a plus sign, +, at the end of the line.) If the system does not automatically display and allow you to edit this text when you access the field, use this command to open an **edit window**. See the next section for a list of window editing commands.
<ESC>Q	Delete (and capture) text to the beginning of the field.
<ESC>R	Restore the field (undo changes).
<ESC>Z	Delete (and capture) text to the end of the field.

<ESC> Commands

1. Press the keys one after another rather than together. To use "<ESC>E", for example, press the Escape key, release it, and then press the "E" key.

2. Enter characters in upper or lower case, as you wish. For example, <ESC>h is equivalent to <ESC>H.

For convenience, some libraries have set up **function keys** to take the place of the commands listed in the table.

Editing in Windows

The following table lists the commands required for editing text within a field window. A window is a temporary workspace for a field in which you may enter or edit several lines or "pages" of data and use some special editing commands. You may also use the arrow, Tab, and Back Space keys as usual.

NOTE: The library might have different commands defined for some functions, such as <ESC>OO rather than <ESC>O for the insert/over-type mode toggle..

Enter	Description
<ESC>A	erAse character under the cursor (the cursor moves to the left)
<ESC>B	tab Backwards
<ESC>D	Delete character under the cursor (the cursor does not move)
<ESC>E	Exit from the window (and save changes)
<ESC>F	reFormat the contents of the window
<ESC>H	go to the beginning of the line (Home)
<ESC>I	Insert (paste) text from your preceding deletion/capture
<ESC>L	go to the end of the Line
<ESC>M	go to the bottoM of the window
<ESC>O	toggle between insert and Overtype modes
<ESC>P	go to the next Page; oPen a window
<ESC>Q	delete (and capture) text to the beginning of the line
<ESC>R	Restore the line (undo changes)
<ESC>S	Split the line into two lines
<ESC>T	go to the Top of the window
<ESC>U	go Up to the previous page
<ESC>Z	delete (and capture) text to the end of the line

<ESC> Commands

1. Press the keys one after another rather than together. To use "<ESC>E", for example, press the Escape key, release it, and then press the "E" key.

2. Enter characters in upper or lower case, as you wish. For example, <ESC>h is equivalent to <ESC>H.

For convenience, some libraries set up **function keys** to take the place of the commands listed in the table.

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B

Enumeration Prediction

This appendix illustrates how the *NUMBERING CODE*, *NUMBER OF PARTS*, *CALENDAR CHANGE*, and *BASE LEVEL* fields of the PUBM - PUBLICATION PATTERN screen affect a complex serial's predicted enumeration.

For a more comprehensive explanation of the publication pattern and these definition fields, see *Publication Pattern* on page 7-45.

Enumeration Definition Fields

When defining a publication pattern's enumeration at the PUBM - PUBLI-CATION PATTERN screen, use the following inter-related fields.

ENUMERATION CAPTION/LABEL
A pattern can have up to 6 levels of enumeration; specify a term for each level you want used. Be sure you include ending punctuation, i.e., v., vol., no., and so forth.

NUMBER OF PARTS
Number of units at this enumeration level which make up a unit at the next higher level.

Used by the system when predicting issues, for determining when to increment the next higher level's counter. For example, if 7 `No`'s make up a `Vol` the system will add `1` to the `Vol` counter each time the `No` counter has gone up 7 times.

NUMBERING CODE
The numbering at this enumeration level is continuous or periodically restarted.

R Restart the numbering at this enumeration level (back at `1` or `A`) on a regular basis.

C Continuous numbering; let the numbering at this level rise indefinitely. If this code is used in conjunction with the *Calendar Change* field, the *Number of Parts* field will be ignored. For example, the system will increment the next higher level's counter based on the dated in the *Calendar Change* field and ignore the value in the *Number of Parts* field.

BASE LEVEL
The base enumeration level; usually the lowest level but in some month-based patterns the next-to-lowest level.

Used by the system when predicting issues, for determining whether a change in month should reset the numbering. The numbering of the lowest and next-to-lowest levels are also be affected by the lowest level's *NUMBERING CODE* (R or C) and *NUMBER OF PARTS* (a number referred to as "M" below).

Lowest level
If you set the *BASE LEVEL* to the **lowest** level (such as `3` in a 3-level pattern), then a change in month will not automatically reset the lowest level's numbering.

- If the lowest level's *NUMBERING CODE* is C (continuous), then the level's numbering continues to increase indefinitely.

- If the code is R (reset), then the level's numbering is reset every M issues.

- In either case, the next higher level's numbering is incremented either every M issues or, if the *Numbering Code* is set to C, at the dates defined in the *Calendar Change* field.

Next-to-lowest level

If you set the *BASE LEVEL* to the **next-to-lowest** level (such as 2 in a 3-level pattern), then the system can handle patterns with different numbers of issues published each month.

If the lowest level's *NUMBERING CODE* is C (continuous), then that level's numbering increases indefinitely.

- If the code is R (reset), then that level's numbering is reset each time a new month begins (or every M issues, whichever comes first).

- In either case, the next higher level's numbering is incremented each time a new month begins (or every M issues, whichever comes first).

Illustration

A complex month-based pattern with varying number of issues per month has been chosen to illustrate the effect of three of the definition fields.

This sample serial has 3 levels of enumeration:

```
        1     2     3
       Vol   No    Pt
```

and the following regularity pattern:

```
JA   FE   MR   AP   MA   JU   JL   AU   SE   OC   NO   DE
 1    1    3    2    4    1    1    1    1    1    1    1
```

Notice that March, April, and May have 3, 2, and 4 issues, respectively.

The table following shows the effect on the predicted `No` and `Pt` numbering when you change the pattern definition in 3 ways:

- `Pt`'s *NUMBER OF PARTS* = 4 (true maximum) versus 3

- *BASE LEVEL* = 2 (next-to-lowest level) versus 3 (lowest level)

- `Pt`'s *NUMBERING CODE* = R (resetting) versus C (continuous).

An asterisk (*) marks the issues at which `No` is incremented. For convenience, only the first 12 issues of the year are shown and the `Vol` numbering is omitted.

NOTE: Many of the resulting predictions are **not** what the library would want for the serial; they are presented here only for comparison. For accurate enumeration, the library would likely specify *NUMBER OF PARTS* = 4, *BASE LEVEL* = 2, and *NUMBERING CODE* = R or C.

```
PATTERN DEFINITION   PREDICTED ENUMERATION (No/Pt)
------------------   ----------------------------
     Pt's NUMBER OF PARTS: 4

      BASE LEVEL: 2
      Vol No Pt JA  FE  MR  ... ... AP  ... MA  ... ... ... JU
           18 4
            R R  1/1 2/1 3/1 3/2 3/3 4/1 4/2 5/1 5/2 5/3  5/4  6/1
                 *** * * *
            R C  1/1 2/2 3/3 3/4 4/5 5/6 5/7 6/8 7/9 7/10 7/11 8/12
                 *** * * *
            Calendar change: Jan, April, July and October
            R C  1/1 2/2 3/3 3/4 3/5 4/6 4/7 5/8 5/9 5/10 5/11 6/12

      BASE LEVEL: 3
      Vol No Pt JA  FE  MR  ... ... AP  ... MA  ... ... ... JU
           18 4
            R R  1/1 1/2 1/3 1/4 2/1 2/2 2/3 2/4 3/1 3/2  3/3  3/4
                 *** * * *
            R C  1/1 1/2 1/3 1/4 2/5 2/6 2/7 2/8 3/9 3/10 3/11 3/12
                 *** * * *
            Calendar change: Jan, April, July and October
            R C  1/1 1/2 1/3 1/4 1/5 2/6 2/7 2/8 2/9 2/10 2/11 2/12




     Pt's NUMBER OF PARTS: 3
      BASE LEVEL: 2
      Vol No Pt JA  FE  MR  ... ... AP  ... MA  ... ... ... JU
           18 4
            R R  1/1 2/1 3/1 3/2 3/3 4/1 4/2 5/1 5/2 5/3  6/1  7/1
                 *** * * *
            R C  1/1 2/2 3/3 4/4 4/5 5/6 6/7 7/8 7/9 8/10 8/11 9/12
                 *** * * *
            Calendar change: Jan, April, July and October
            R C  1/1 2/2 3/3 3/4 3/5 4/6 4/7 5/8 5/9 5/10 5/11 6/12

      BASE LEVEL: 3
      Vol No Pt JA  FE  MR  ... ... AP  ... MA  ... ... ... JU
           18 4
            R R  1/1 1/2 1/3 2/1 2/2 2/3 3/1 3/2 3/3 4/1  4/2  4/3
                 *** * * *
            R C  1/1 1/2 1/3 2/4 2/5 2/6 3/7 3/8 3/9 4/10 4/11 4/12
                 *** * * *
            Calendar change: Jan, April, July and October
            R C  1/1 1/2 1/3 1/4 1/5 2/6 2/7 2/8 2/9 2/10 2/11 2/12
```

C

Holdings Record Data

The basis for ADVANCE holdings information is the USMARC Format for Holdings Data, Update No.2, July 1994. The level of these holdings is USMARC Level 5 with some Geac defined extensions.

The leader and any tags other than the standard holdings tags (583, 84X and 856) can be input and maintained in MARC format in the Location Copy Record (LOCCPY) in Holdings edit.

This appendix discusses:

- 852 tag

- 866/7/8 Textual Note

- 953 tag

- 954/5/6 tag

- 583 Action Note

- 841 Holding Coded Data Values

- 842 Textual Physical Form Designator

- 843 Reproduction Note

- 844 Name of Unit

- 845 Terms Governing Use and Reproduction Note

852 Tag Specification

Subfield	Description	Repeating [R] Nonrepeating [NR]
$a	NUC (National Union Catalog) symbol for the institution.	NR
$b	Institution code, Sublocation code, Collection code The agency or institution code, e.g., AU or PUB. If desired, a two or three character code may be used for efficiency in keying, and be translated by the system to a five character string for display as a meaningful symbol in the online catalogue. Codes entered must be predefined in the system tables. The sublocation code, e.g., CAM1 or Main.Used to differentiate between physical locations or libraries within an institution, for example, a separate law or music library. It can also be used to define the separate libraries or branches within a networked system. Codes entered must be predefined in the system tables. The collection code, e.g., A/V or music. Records the physical location or collection within each institution and sublocation. Only one collection may be associated within a networked system. Codes entered must be predefined in the system tables.	R
$h	The classification number e.g., `Z699.4.M2` or 025.30285. Equivalent to the 050 $a or 090 $a for LC classification, or the 082 $a or 092 $b for Dewey classification. Non-print media designators may also be entered here, e.g., microfilm.	NR
$i	Used for the book number portion of LC call numbers or the Cutter number portion of Dewey call numbers. Equivalent to the 050 $b or 090 $b for LC call numbers, or 082 $b or 092 $b for Dewey call numbers. May also contain information used to distinguish editions, e.g., dates.	
$j	The shelf control (or accession) number, government document numbers, or other serial numbers for items that are not classified, e.g., `9000259`.	
$k	Call number prefix	R (Geac specific)
$m	Call number suffix	NR
$p	The item's barcode number, e.g, `391230001234`. Barcode prefixes entered are checked for validity in the system tables. The system checks the barcode entered for duplicates already in the database.	NR

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Subfield	Description	Repeating [R] Nonrepeating [NR]
$t	The copy number e.g., 2. Do not enter *c*.; this is system-supplied on display.	NR
$x	Nonpublic note	R
$z	Public note	R
$3	Materials specified Contains the spine label information (enumeration and chronology, including captions) of the piece. The format of the $3 subfield is as follows: Each level of enumeration is comprised of a label (caption) and an enumeration value. In bibliographic cataloguing, labels (e.g., v) are followed by a period(.) and the enumeration value (e.g., v.67). If you enclose a label in brackets or parentheses, it will not display on the screen or print on spine labels. Labels enclosed in brackets or parentheses should not be separated from the enumeration value by a '.' (e.g., [no]12). Within the enumeration portion of the subfield, multiple levels of enumeration can be specified and are separated by a semi-colon (e.g., v.67;[no]12). Chronology data can also be entered into this subfield. It is separated from the enumeration data by a colon (':'). If no enumeration data is defined, the subfield should begin with a ':'. Each level of chronology is comprised of a label (caption) and a chronology value. As with the enumeration definition, labels are followed by a period (.) and the chronology value. If you enclose a label in brackets or parentheses, it will not display on the screen or print on spine labels. Labels enclosed in brackets or parentheses should not be separated from the chronology value by a '.' (e.g., (year)1989). Within the chronology portion of the subfield, multiple levels of chronology can be specified and are separated by a colon (e.g., (year)1989:(month)Dec). When a piece is made up of more than one part, the $3 subfield is repeated for each part.	R

Example 852 $3

$3 Value	Displays as
`v.1;no.3`	`v.1:no.3`
`v.1;[no]3`	`v.1:3`
`v.1;no.3:(year)1989:(month)Jan`	`v.1:no.3(1989:Jan)`

`v.1;no.3:(year)1989:(month)Jan`
`v.1;no.4:(year)1989:(month)Feb`
`v.1;no.5:(year)1989:(month)Mar`
`v.1;no.6:(year)1989:(month)Apr`
	`v.1:no.3(1989:Jan)-`
	`v.1:no.6(1989:Apr)`

`:(year)1989:(month)Jan`	`1989:Jan`

866/7/8 Textual Note

Indicators	
First	Field encoding level.
Second	Type of notation.

Subfield	Description	Repeating [R] Nonrepeating [NR]
$a	Textual holdings	NR
$x	Nonpublic Note	R
$z	Public note.	R
$8	Link and sequence number.	R

NOTE: Not all combinations of the link and sequence number are supported.

You may define a textual note that displays:

- prior to the detailed holdings for two separate type of holdings
- instead of the detailed holdings for a particular type of holding
- prior to the detailed holdings for a specific publication pattern
- instead of the detailed holdings for a specific publication pattern

There is no way to suppress display of all detailed holdings for more than one set of 863/4/5 tags with one 866/7/8 tag (the $80 is not supported).

876/7/8	Item Information. This tag is not used.

953 Tag Specification

Used to import and export:

- owning location information when the owning location is different from the current location.

- circulation codes and other information not supported in the USMARC Format for Holdings Data standard.

This tag also provides a means to display MASTER pieces information in the OPAC instead of the slave piece's information.

Subfield	Description	Repeating [R] Nonrepeating [NR]
$a	MASTER piece's Institution or Sublocation or Collection — appears only if a piece is a slave	R
$b	Institution code, Sublocation code, Collection code (OWNING)	R
$c	Cost of piece	
$d	Displayable Circulation status information	NR
$e	Circulation status from ADVANCE	NR
$f	Due date (YYYYMMDD)	
$g	Due time (HH:MM:SS)	
$h	Classification part (OWNING)	NR
$i	Item part (OWNING)	R
$j	Shelving control number (OWNING)	NR
$k	Call number prefix (OWNING)	R
$m	Call number suffix (OWNING)	NR
$n	Pieces bound label (Free text label assigned to the PIECES record, i.e. vol.1.)	NR
$o	Title of the piece (when this is a master piece bound with one or more slave pieces)	
$p	Piece designation	NR

Subfield	Description	Repeating [R] Nonrepeating [NR]
$q	Current number of holds in the queue for the title.	NR
$r	Replaced piece designations (barcodes/Nbarcodes)	R
$s	Pieces keys linked to master - Slave Items	R
$t	Pieces action flag from ADVANCE	NR
$u	Current Circulation Code	NR
$v	Vendor Code	NR
$w	Owning Circulation Code	NR
$x	Nonpublic notes	R
$y	Bound with master key (for slave)	NR
$z	Public notes	R
$1	MASTER piece's Call Number Prefix — appears only if a piece is a slave	R
$2	MASTER piece's Call Number Prefix (Classification part) — appears only if a piece is a slave	NR
$3	MASTER piece's Call Number Prefix (Item part) — appears only if a piece is a slave	R
$4	MASTER piece's Call Number (Shelving control number part) — appears only if a piece is a slave	NR
$5	MASTER piece's Call Number Suffix — appears only if a piece is a slave	NR
$6	MASTER piece's Copy Number	NR
$7	MASTER piece's Displayable Circulation status information — appears only if the piece is a slave	NR
$8	MASTER piece's Circulation status from ADVANCE — appears only if the piece is a slave	NR
$9	MASTER piece's Due date and time separated by a forward slash (YYYYMMDD/HH:MM:SS) — appears only if the piece is a slave	NR

954/5/6 Geac Type of Holdings LOCAL Tag

Used to import and export:

- type of holdings description
- last received issue and date information.

There is:

- one 954 tag for each type of holding record with a type 0, Basic Bibliographic Unit
- one 955 tag for each type of holding record with a type 2 (Supplementary Material)
- one 956 tag for each type of holding record with a type 1 (Indexes).

Indicators	
First	Undefined.
Second	Undefined.

Subfield	Description	Repeating [R] Nonrepeating [NR]
$8	Linking number of the 853/4/5 tag that belongs to this type of holding.	R
$a	Type of holdings description used in the OPAC display.	NR
$b	Last issue received in displayable format — that is the captions and numbering are consistent with the defined patterns and can be displayed, for example, v.12:iss.3.	NR
$c	Date of the last issue received and displayed in the format mmm dd, yyyy (i.e., FEB 19, 1998).	NR

957 Summary Holdings LOCAL TAG

Used to facilitate exporting summary holdings statements to the Geos clients. Each 957 tag contains a $a and repeating $b subfields. When displaying this information, the contents of each $b should be displayed on a new line. The occurrence of the 957 tag corresponds with the presence of a Type of Holding record (with holdings) in ADVANCE. These tags appear only in a Level 5 holdings record that is being sent to the client.

For example,

957 ‡aAnnual Cumulation:‡bNo.5(1997:JAN) No.6(1997:FEB) No.7(1997:APR)
    No.8(1997:AUG)‡bLast rec'd: No.8(1997:AUG) on JAN
    22, 1998
957 ‡aGeneral Index:‡b1996‡bLast rec'd: 1996 on JAN 22, 1998
957 ‡aPocket Parts:‡b1996‡bLast rec'd: 1996 on JAN 22, 1998

Should display as:

Annual Cumulation: No.5(1997:JAN) No.6(1997:FEB) No.7(1997:APR)
                   No.8(1997:AUG)
                   Last rec'd: Vol.8(1997:AUG) on JAN 22, 1998
General Index: 1996
                Last rec'd: 1996 on JAN 22, 1998
Pocket Parts: 1996
                Last rec'd: 1996 on JAN 22, 1998

Indicators	
First	Undefined.
Second	Undefined.

.

Subfield	Description	Repeating [R] Nonrepeating [NR]
$a	Label information	NR
$b	Summary holdings statement in displayable format	R

Action and Other Note Fields

The following Note field information is provided for information only. There is no Geac specific implementation of these fields.

NOTE: The 583 Holdings field is identical to the 583 bibliographic field except the bibliographic field has an additional subfield 6 (Linkage) that is not present in the Holdings standard.

583 Action Note (R)		
Indicators		
First	Undefined	
Second	Undefined	
Subfields		
a	Action	Non-repeating
b	Action identification	Repeating
c	Time of action	Repeating
d	Action interval	Repeating
e	Contingency for action	Repeating
f	Authorization	Repeating
h	Jurisdiction	Repeating
i	Method of action	Repeating
j	Site of action	Repeating
k	Action agent	Repeating
l	Status	Repeating
n	Extent	Repeating
o	Type of unit	Repeating
x	Nonpublic note	Repeating
z	Public note	Repeating

583 Action Note (R)		
3	Materials specified	Non-repeating
5	Institution to which field applies	Non-repeating
8	Link and sequence number	Non-repeating

841 Holdings Coded Data Values (NR)		
Indicators		
First	Undefined	
Second	Undefined	
Subfields		
a	Type of Record	Non-repeating
b	Fixed-length data elements	Non-repeating
c	Encoding level	Non-repeating

842 Textual Physical Form Designator (NR)		
Indicators		
First	Undefined	
Second	Undefined	
Subfields		
a	Textual physical form designator	Non-repeating

NOTE: The 843 Holdings field is identical to the 533 bibliographic field except the bibliographic field has an additional subfield 6 (Linkage) that is not present in the Holdings standard.

843 Reproduction Note (R)		
Indicators		
First	Undefined	
Second	Undefined	
Subfields		
a	Type of reproduction	Non-repeating
b	Place of reproduction	Repeating
c	Agency responsible for reproduction	Repeating
d	Date of reproduction	Non-repeating
e	Physical description of reproduction	Non-repeating
f	Series statement for reproduction	Non-repeating
m	Dates of publication and/or sequential designation of issues repro-duced	Repeating
n	Note about reproduction	Repeating
3	Materials specified	Non-repeating
7	Fixed-length data elements of reproduction /0 Type of date/Publication status /1-4 Date 1/Beginning date of publication /5-8 Date 2/Ending date of publication /9-11 Place of publication, production, or execution /12 Frequency /13 Regularity /14 Form of item	Non-repeating

844 Name of Unit (NR)		
Indicators		
First	Undefined	
Second	Undefined	
Subfields		
a	Name of unit	Non-repeating

NOTE: The 845 Holdings field is identical to the 540 bibliographic field.

845 Terms Governing Use and Reproduction Note (R)		
Indicators		
First	Undefined	
Second	Undefined	
Subfields		
a	Term governing use and reproduction	Non-repeating
b	Jurisdiction	Non-repeating
c	Authorization	Non-repeating
d	Authorized users	Non-repeating
3	Materials specified	Non-repeating

D

Glossary

This glossary explains many of the terms you may encounter in the documentation or while performing system activities.

Words shown in *italics* are defined elsewhere in the glossary.

A

AACR2   Anglo-American Cataloguing Rules, version 2. These are the rules that form the "bible" of cataloguing procedure as they relate to the construction of catalogues and other lists.

access level   A number between 0 and 99. The higher the number, the more you are allowed to do. See also *priority level*.

access point   An entry point into a catalogue. A heading by which a bibliographic record may be retrieved.

accession number   A number assigned by the library to an individual *bibliographic item* when it is added to the library's collection. In ADVANCE, the accession number is usually replaced by assigning a *barcode* to the item. Barcodes themselves may constitute a form of accession number, if they are sequential.

account   Accounts are used within the PICK system software. ADVANCE is an account in SYSPROG.

accounts receivable   The Circulation process by which patron fines are paid, created, or assessed and other financial transactions are performed.

Acquisitions module   The ADVANCE module used to order and keep track of the purchase of items for a library, both serials and monographs.

added entry
: An entry, other than a subject entry and additional to the main entry, under which a bibliographical entity is represented in a catalogue.

ALA character set
: An extended 8-bit ASCII character set defined for MARC records and adopted by the American Library Association. Of the 256 characters allowed for by this code, US/MARC defines 208.

application
: A software program or set of programs that uses the computer as a tool, as opposed to the software necessary to run the computer.

archive tape
: Tape from a *bibliographic utility* (*OCLC*, *WLN*, *RLIN*, or *UTLAS*) which are released to each library and contain a copy of that library's records from the utility's database. Tapes are produced regularly.

ASCII
: An acronym for "American Standard Code for Information Interchange". A standard 7-bit code representing up to 128 characters. The ASCII code is used in computer communications.

attach
: To connect a job or terminal to the computer in such a way that they can communicate. Also, to define communications characteristics for a terminal.

authoritative form
: The form of a heading that has been chosen as the standard form to be used in all bibliographic records.

authority control
: A way of handling and standardizing bibliographic information using "see" and "see also" references.

: The classic example of a "see reference" is Mark Twain vs. Samuel Clemens. The library decides which of these names for the same author will be the "established" form — say, Mark Twain. If users look for "Clemens, Samuel", they will find the reference, "see Twain, Mark".

: "See also references" are generally used in subject searches. A user who looked under the subject of "Home" might find "see also Family".

: Authority control refers to the sum of the library's cataloguing decisions as to which bibliographic elements will be established form headings, rejected form headings, and related headings.

authority file
: Records of the correct forms of names, series, or subjects used in the catalogue. The purpose of the authority file is to keep entries uniform.

authority hot key
: The function key a user can press to browse and retrieve an authority heading for the MARC field they are cataloguing.

B

backup
An exact copy of a primary unit that can be used in place of the primary unit in case the primary unit fails. Usually 'backup' refers to copies of ADVANCE software and the library's data files which are kept on tape. If the disk versions of these files get damaged, the files can be restored from the backup versions on tape.

barcode
A series of printed lines and spaces representing numbers, letters, or other symbols. Barcodes are not eye readable. The format of the barcode varies from one manufacturer to another. Geac equipment can work with several barcode formats, including 'CODABAR' and Code 39.

barcode reader
A device for reading barcode labels into a system. Generic term for 'laser scanner' or 'lightpen'.

batch
A collection of commands and input held in an editor file. Similar to a program, but relatively simple. Batches feed instructions to the computer without requiring the presence of an operator. When you execute a batch, it usually performs several control console commands and may run several programs in a pre-assigned order.

baud rate
Also simply "baud". A standard unit, in bits per second, used to express the data transmission capability of lines, terminals, and interface equipment.

bibliographic item
A document or set of documents in any physical form, published, issued, or treated as an entity, and as such forming the basis for a single bibliographic description. Contrast with *physical volume* and *copy*.

bibliographic record
In ADVANCE, the MARC format record that describes one bibliographic item. For example, if the library owns 10 copies of a three-volume edition of "War and Peace", it will describe them in one Bibliographic Record with 30 items or pieces in the Item File — 10 for each of the separate volumes.

bibliographic utility
An online processing centre whose services are based on a machine-readable database of catalogue records. The main North American utilities are *OCLC*, *WLN*, *UTLAS*, and *RLIN*.

binding entry
An entry in a bibliographic record to indicate that an item is physically bound with one or more other items. Used with books bound together, AV kits, etc.

bit	A binary digit. A data field that has only two possible values, 0 or 1 — that is: NO or YES; OFF or ON.
blind heading	This is an authorized heading for which no authors or subjects exist in the bibliographic database. In general, blind headings do not appear in the Online Catalogue. Note, however, that blind, non-provisional, topical subject headings do appear in the Online Catalogue. All blind headings can be searched for in the Cataloguing module.
blind reference	This is a reference to an authorized heading that does not exist in the bibliographic database. In general, blind references do not appear in the Online Catalogue. Note, however, that references to blind, non-provisional, topical subject headings do appear in the Online Catalogue.
Boolean searching	A searching technique in which search terms are presented to the system in a particular manner. These terms are operated on with Boolean logic, which means the search terms may be separated by the operators AND, OR, NOT. For example, consider the subject search: COMPUTERS AND CARS. This search would result in the retrieval of a series of items in which both COMPUTERS and CARS formed a subject term.
boot	Short for "boot strap". The operation of loading the initial elements of the 'operating system' into computer memory.
borrower	Known as *patron*.
BOT	Reflective marker to identify the beginning of a tape.
bug	An error in a program or hardware function that causes the function to work incorrectly.
byte	A character of data, normally represented by 8 bits.

C

call number	Alphanumeric code used to identify and locate a particular item on the shelves. Call numbers usually consist of a classification number and author or cutter number; they may also include an accession number. In most systems, the call number also classifies the subject material of the book. Various systems exist - common ones are *LC* and *Dewey*.
CAN/MARC	Canadian version of the MARC format.

carriage return	Indicates the use of the ENTER or RETURN key on the keyboard. Operators use this key to send data to the computer, or to respond to a prompt. Sometimes abbreviated to "<CR>".
Cataloguing module	The ADVANCE module that automates bibliographic and authority control.
cataloguing source number	Unique number assigned by the provider of the cataloguing record: e.g. OCLC, LC.
charge	Known as *checkout*. A function in the Circulation module: the process by which a library item is lent to a patron. To loan a book to a patron is to charge it out to the patron.
checkdigit	A calculated digit added to the end of a number used to validate the correctness of the sequence of digits. Used in *barcodes*, *ISBN*s, and so on.
checkin	1) In the Circulation module, the process of checking returned items in at the circulation desk. Also known as *discharge*.
	2) In the Acquisition and Serials modules, *checkin* is the process of receiving an item shipped to the library, and recording the receipt on the system.
checkout	A function in the Circulation module: the process by which a library item is lent to a patron. To loan a book to a patron is to *charge* it out to the patron.
chronology	Date that identifies an issue of a serial — e.g. "June 1991".
Circulation module	The ADVANCE module that automates circulation functions and transactions.
citation	A display of bibliographic information describing a given work.
CODABAR	A 14-digit *barcode* format that ADVANCE uses.
COM	Acronym for "Computer Output on Microform". Information is recorded on microfilm or microfiche instead of paper.
command	An order telling the system to start, stop, or continue an operation within a function. Commands are usually entered by typing a mnemonic code.

compile	To translate a program from a high-level source language to a machine-executable form.
content designator	The means of identifying data elements and/or of providing additional information about a data element. Content designators consist of tags, indicators, and subfield identifiers.
control characters	Keyboard letters, numbers, or symbols which are entered while the <CONTROL> key is held down. They are not normally printable characters.
control console	A terminal, usually in the computer room, from which the system may be controlled.
conversion	The process of turning machine-readable records in one format into machine-readable records of a different format.
copy	A single piece of a document; a duplicate; an instance of a serial issue. See also *bibliographic item, physical volume*, *piece*, and *copy set*.
copy number	A number assigned by the library to a copy. The number need not be unique. Its usual purpose is to distinguish between different copies of the same title, or different copy sets of the same serial title.
copy set	A duplicate run of issues of a serial; simplistically a "subscription".
copy-specific hold	A hold placed on a specific copy. A copy-specific hold may be used, for example, to capture a particular copy to be sent to the bindery. Contrast with title-level hold.
core	Computer memory, usually measured in megabytes: "MB".
CRT	Cathode Ray Tube screen of a terminal. Also known as VDU (visual display unit).
CSN	Cataloguing Source Number.
cursor	A small square or line on the terminal screen which tells you where the next character you type will appear.
cutter number	Part of the *call number* used to identify the author for filing purposes.

D

database
: A pool of data held in computer storage, controlled by a central authority, and available to any application capable of accessing the storage. It is designed to meet the requirements for consistent and current data by many or all of an organization's application systems.

data communication
: The transmission of data across geographically separated locations.

data element
: The smallest unit of information that is explicitly identified in MARC format. Within a variable field, a data element is identified by a subfield identifier. Within the record label, the directory, and a fixed-length subfield, a data element is identified by its character positions.

date of last use
: The date of the last transaction associated with a particular record.

Dewey
: Dewey Decimal Classification system, developed by Melvil Dewey.

diacritics
: Also "diacritic characters/marks". The marks, such as accents, which appear under or over characters, used to denote a specific sound for a given character. Sometimes used to refer to non-English alphabetic characters as well.

discharge
: Known as *checkin*. A function in the Circulation module: the process by which library staff record that a borrowed item has been returned by the patron.

disk
: Also "hard disk". A magnetic storage medium, like magnetic tape, but in the form of a platter, similar to a phonograph record.

disk drive
: A data storage device that holds, reads from, and writes to *disks*.

diskette
: Also "floppy disk". Similar to *disk*, typically used with microcomputers.

DOS
: Disk Operating System, for a microcomputer.

download
: The data flow from the host computer system **down** to the microcomputer.

E

edit record The "edit" records are the temporary, work versions of bibliographic records, stored in the Work File. Edit records are not shown in the Online Catalogue.

edition A new edition of a work, revision. Edition information may modify some but not all of the bibliographic information for a work. According to AACR2, a new bibliographic record must be created for a new edition.

editor A program that enables the user to create, purge, retrieve and update variable-length record source files.

editor file A file created using the editor.

enumeration Numbering that identifies an issue of a serial — e.g. "Vol.3 Pt.A".

EOF The magnetically recorded mark at the end of a file.

EOT The reflective marker at the end of a tape attached to the tape surface.

established form This is the form of a heading that has been chosen as the standard form that should be used in all bibliographic records. Also known as *authoritative form*.

F

F.E. Stands for "Field Engineer". Also written "FE".

F.E.D. Also written "FED". Field Engineering Division — the Geac department responsible for maintaining and repairing hardware.

field 1) A MARC "field" is a defined part of a MARC record used to contain only a specific category of data. For example, included in the Bibliographic Record is the Main Entry - Personal Name Field (Tag 100), the Title Statement Field (Tag 245), and the Local Call Number Field (Tag 090). There are two kinds of MARC fields - *variable length* and *fixed length*. Some people use the word "tag" to refer to a MARC field.

2) An area on the screen where you can enter data, or where the system will display information: for example, author, title. Fields often appear on the screen with a descriptive word beside them. For example, the author field usually has "AUT:" or "AUTHOR" beside it.

field separator	A control character used at the end of each *variable field* to separate it from the next.
file	A collection of related records treated as a unit.
	A file is a logical structure which associates a set of items. On a PICK system, files are organized in a hierarchical structure. There are four levels of files: the System Dictionary, a users' Master Dictionary, File-level Dictionaries, and the Data Files. A PICK system can contain any number of files, which can contain any number of data items, limited only by the size of the disk drive.
file structure	The rules of organization that relate records within a file.
fixed-length field	Also "fixed field" and "control field". A MARC field of pre-defined length in a bibliographic record: for example, the Physical Description Field (Tag 007). Fixed-length fields are made up of one or more fixed-length data elements (sometimes called *offset*s).
fixed-length field element	Part of a MARC *fixed-length field* whose length and contents are pre-defined. For example, the language code (character positions 35 to 37) in Tag 008.
fixed-length subfield	A *subfield* whose length is invariant, being determined for all occurrences by provisions of this format. A fixed-length subfield may be defined to contain one or more data elements. Fixed-length subfields may occur in both fixed-length fields (e.g. field 100, subfield ‡a), and variable-length fields (e.g. field 200, subfield ‡z).
frame	Disk drive storage is divided into sections called "frames". Each frame is numbered, giving the system direct access to that particular frame-id or FID. The physical size of a frame is machine-dependent, and limited only by the size of the disk drive.
function	In ADVANCE, "function" refers to each of the possible actions available in the main menus.
	For example, in the Circulation module, "function" refers to an operation available in the online menus: e.g. checkout.
fund	The library can define amounts of money to be encumbered, spent, referred to, and reported on through named "funds" within the Acquisitions module. The term "fund" is used to contrast with external "accounts" which are not system-maintained.

G

GFE — Group Format Error. A GFE typically indicates that the data may be corrupted. Normally GFEs are caused by a sudden power failure.

H

hang — Refers to the situation where the computer does not respond to terminal activity. Usually the result of some kind of fault, either in the software or the hardware.

hold — Sometimes called "reservation". A facility in Circulation referring to the process by which an item not currently available is reserved for the patron. It is normally used when all copies are on loan. When the item becomes available, the library sets it aside for the requesting patron.

holdings — **Piece holdings**: the physical volumes that the library owns of a given work.

Copy holdings: the issues that the library owns of a serial.

Summary holdings statement: a description of the range of copy holdings.

host — The controlling or main computer in a data network.

hot key — See *authority hot key*.

I

imprint — Publisher name, including date and place of publication.

index — A list of data arranged in some order (usually alphabetical) using a special "key" (such as author, title, etc.) which acts as an access point to the database. Indexes facilitate quick access to a large body of data.

index entry — A word, phrase, or number used to locate an item within a specific index.

index key — The term or phrase from a source record which allows you to search for that record - for example, "Twilight Zone", or "Bowie, David".

indicator — A special data element in a MARC variable field. Each US/MARC variable field must have two one-character indicators.

intensity	The brightness of the characters on the screen.
interface	To interconnect devices or systems with different characteristics. Usually involves converting data suitable for one system into a form suitable for a second system. The term can be used as a verb or a noun. It can be applied to a cable or a connector, to a device that performs a conversion operation, or to a conceptual boundary.
interlibrary loan	The arrangement whereby a library system may borrow items from another library system. Either or both of the two libraries may be Geac customers. ILL patron privilege classes and material types should be defined in the Policy Tables.
invoice	An accounting document supplied to the library by a vendor, indicating the character, quantity, price, terms and nature of delivery of goods sold or services rendered. In the Acquisitions module, staff members will create a system record for each invoice received.
I/O	Abbreviation of "input/output".
ISBD	"International Standard Bibliographic Description" — a format for describing bibliographic information.
ISBN	"International Standard Book Number" — an alphanumeric code (with dashes) assigned by some publishers to their works. The same work published in different countries will have different ISBNs.
ISO	Short form for "International Standards Organization".
ISSN	International Standard Serial Number. Similar to ISBN, except for serials.
issue	A publication unit of a serial, usually identified by unique enumeration (numbering) and chronology (cover date).
item	Used variously, in different contexts, to mean *bibliographic item*, *physical volume*, *copy*, or barcoded *piece*.

J

job	Often used as a synonym for "program". A unit of work to be done using the computer. Often accomplished through the use of a batch or program.

journal entry	In the Acquisitions module, a transaction record specifying the transfer of money into or out of one or more funds.

K

KB	Short for "kilobyte" — 1024 *bytes* of memory.
keyword	A word which is used as an access point to the bibliographic record. These words are taken from author, title, and subject, and individually indexed without regard to order of appearance.

L

laser scanner	Device for reading barcodes or OCR labels. See also *barcode reader*.
LC	Short for "Library of Congress". It refers to the Library of the Congress of the United States, a body with some of the characteristics of a national library. Also used to refer to the classification system used by the Library of Congress.
LCSH	"Library of Congress Subject Headings". A subject classification system for cataloguing.
LC Card Number	Sometimes abbreviated to "LCCN". "Library of Congress Control Number" — the number assigned to an item by the Library of Congress production services as a printing control number / inventory number after an item has been catalogued.
LC MARC Records	Records in *US/MARC* format produced by the Library of Congress.
leader	The beginning portion of a MARC record. The leader contains coded information about a record, including record type, bibliographic level, and creation date. The information is stored in a fixed-length format.
library system	Also called "library", or more often, "site". A purchaser of ADVANCE. A library system may consist of a central library, along with its branches and departments. Alternatively, a library system may be a consortium or co-operative. A library system is composed of one or more "agencies" which share the same CPU.
lightpen	The pen-like device attached by a cord to the terminal. It is used to read *barcodes* into the system for operations such as registering new patrons

to the system, searching quickly and accurately for those already there, or entering a patron or item during a function such as CHECKIN, CHECKOUT, etc.

line	The transmission medium and equipment for carrying speech and/or data between separated locations, usually between host computer and remote terminal.
line printer	The printers used to print reports are often called "line printers", so named because they print one line at a time. Printing speed for line printers is given in number of lines per minute: for example, "600 lpm".
linking	The process of adding holdings information and (in particular) a barcode number for an item to the item's bibliographic record.
	Also used in the Reserve Book Room to bring together specific courses with items.
load	To mount a tape on the tape drive and set it to the load point.
load point	The beginning of the usable portion of a tape. The load point occurs when the tape drive detects a one inch reflector on the tape (the *BOT* mark). A tape at load point may be used as soon as the drive goes online.
local call number	Known as *shelf location*.
local copy number	Known as *copy number*.
log	To record events and their time of occurrence.
log on	See *sign on*.
log off	See *sign off*.

M

magnetic tape	Storage medium for information. Usually used in conjunction with a computer system. Typically, the magnetic tape is 1/2 inch in width, and comes in various lengths.
main entry	In a manual cataloguing system, the primary access point for a bibliographic item. Normally the author but sometimes the title.

MARC field	A *fixed-length* or *variable-length field* in a MARC format record.
MARC format	"MAchine Readable Cataloguing" — a standardized communications format for storing and transferring bibliographic and authority cataloguing data records on magnetic tape. A MARC record is composed of a leader, a directory to the fields, fixed length fields, and variable length files. National libraries issue records for various materials in their own versions of MARC: for example, US/MARC, CAN/MARC, UK/MARC.
material type	A category of library materials used in the library. For example, newspapers, adult fiction paperbacks, and video cassettes could all have different material types. The library usually categorizes its materials based on its circulation policies (such as loan period) and the statistical reports desired. Every item is assigned a material type. A two-character code identified by MARC.
master record	Completed bibliographic records, stored in the main bibliographic file, or the main record for binding entry records.
MD or M/DICT	"Master Dictionary" — each user account on the system has a Master Dictionary associated with it. It is structurally similar to all other files on the system. Many things that a user enters at the TCL prompt are contained in the user's Master Dictionary: verbs, procs, connectives, file-names, etc.
menu	A listing of the functions available online that allows a user to choose and perform a variety of actions. The user selects the action by entering certain key(s).
module	An "application" package within the ADVANCE System — examples: the Circulation module, the Cataloguing module.
monograph	Book; contrast with *serial*.

N

non-filing	Words or characters that do not affect sorting. For example, **The Joy of Cooking** is filed under "J" for "Joy", not "T" for "The". "The" is a non-filing word.
non-filing count	A specific number of characters which will be ignored for sorting purposes. Usually applied to the title of a work, and usually counted from the first character in the title. For example, **The Joy of Cooking**,

filed under "J" for "Joy", would have a non-filing count of "4" (the three characters in "The" plus one space). This count is normally placed in one of the indicators of a MARC record.

normalization
To improve the matching and filing of index entries, several "normalization rules" are applied automatically. For example, all letters may be converted to upper case, and some punctuation marks can be converted to blanks or stripped.

note
A type of field or screen display where library staff can enter free text about a patron or item.

notice
In ADVANCE, "notice" generally refers to an item printed by the library, but meant to be circulated outside the library, such as a fine notice, overdue notice, or claim notice (in Acquisitions).

O

OCLC
A bibliographic utility, formerly "Ohio College Library Center", now "Online Computer Library Center". Among other services, it provides a machine-readable database for cataloguing.

OCR
Optical Character Recognition or Reader.

offline
Opposite of *online*.

offset
Another term for fixed-field data elements.

online
"Online" has two meanings:

1. Connected directly to and interacting with a computer.

2. A major program used to make computer interaction easier: for example, the Circulation online.

Online Catalogue
One of the ADVANCE modules, the Online Catalogue is an online query system that automates manual catalogue systems for lookup only. It allows library patrons to search the MARC records database. Patrons can examine bibliographic records, locating items through standard indexes such as subject, title, author, series, keywords, and bibliographic identification numbers.

OPAC
Short for "Online Public Access Catalogue". The ADVANCE OPAC is known as the "Online Catalogue".

operating system	Often referred to as "OS". The set of programs that control the computer and its processing.
operator	The person using a terminal.
order	See *purchase order*.
OS	Short form for *operating system*.
OSI	Stands for "Open System Interconnect." An international standard developed by *ISO* and used for communication between different types of computers. The OSI model defines 7 levels for the interconnect.

P

parity	A system of detecting errors in data transmissions and transfers. By selectively adding a single bit to bit patterns, parity causes the bit patterns to have either an odd number of bits turned On (odd parity), or an even number of bits turned On (even parity).
parity error	Parity errors occur when the bit patterns caused by the system's 'parity' setting are incorrect: for example, when the system detects a "0" but expected a "1". Parity errors imply that one portion of the system has detected a non-recoverable failure by another part of the system.
password	A code which is typed by an operator to sign on to the system or to a module. The password determines the operator's *access level*.
password security	The type of security in which staff passwords are used. The password indicates the operator's access level which, in turn, determines the commands he or she is permitted to use.
patron	Refers to the individuals who use the goods and services offered by a library. Also called "borrower" and "user".
patron agency	The location/library where a patron is registered.
patron class	Known as "patron privilege class".
patron record	The record that describes a patron. The description includes: name, barcode number, address, and other patron-related information.

peripheral	Also "peripheral device". In a computer system, a functional unit that makes and/or receives data transfers. The term includes storage devices (such as tape drives), input devices (such as terminals), and output devices (such as printers).
physical volume	All that is contained in one binding, portfolio, etc., whether as originally issued or as bound after issue. A physical volume does not necessarily coincide with a bibliographic volume, which is characterized by a title page and separate pagination. See also *piece*.
PICK	The operating system and database management system used by ADVANCE.
piece	A barcoded circulation unit, usually corresponding to a physical volume. Each barcoded volume of a monographic bibliographic item is a piece. In ADVANCE, piece control is handled by the Cataloguing module's holdings function.
pointer	A data element which specifies the record-number of a record in a file, or in a related file.
policies	Each library has certain characteristic ways of handling the way it conducts business. These are referred to as "policies". Circulation Setup policies include loan periods, book limits, material types, renewal limits, fine amounts, and so on.
policy parameters	Library policies stated explicitly in the form of sets of values for the Geac-supplied tables, lists of options, and so forth.
policy tables	The tables completed by a library during the installation process. These define the library policies, contain the decisions regarding library options, outline the structure of the system and list the various codes used by the library. Each module has its own set of tables.
port	An interface that connects one or more devices (e.g., terminals, printers) to the computer. Each port has a unique number.
powerfail recovery	The computer's ability to recover from power failures without losing data.
printer	A peripheral device used to provide hard copies of data.

priority level	Refers to a "security level" required to perform a function. There is a level of security associated with each command, ranging from 0 to 99 (highest = most). Synonymous with *access level*.
PROC	PROC is short for stored procedure. PROC allows the user to pre-store a complex series of operations which can be invoked by a single command. Anything which can be done at the TCL level can be accomplished with a PROC.
program	A sequence of machine-readable instructions that a computer can execute. When a program is executed, it performs some function or operation.
project manager	The Geac Project Manager is responsible for liaison between Geac and the individual customer.
prompt	A message from the *operating system* or an *application* program. Prompts appear on the CRT screen, and require a response from the computer operator.
publication pattern	A serial's *enumeration* pattern, *chronology* pattern, and publication frequency pattern, used by the Serials module to predict issues.
purchase alert	A warning that additional copies of a title may be needed. Usually because all copies are missing or because the "hold ratio" for this item (that is, the number of holds compared to the number of active copies) is very high.
purchase order	A record authorizing a vendor to deliver materials or services, usually at a set price, to the library. One or more copies of one or more items can be covered by a single purchase order (sometimes abbreviated "PO").

R

reboot	To perform a second or subsequent *boot*.
recall	To require that a book on loan be returned before the expiry of the due date that was assigned when the charge was made.
recompile	To perform a second or subsequent *compile* of a program.
recon	Retrospective conversion of bibliographic records into machine-readable format. This process typically occurs when a library purchases a

library automation system but still has some bibliographic records that were never put into machine-readable format.

record
To make computer processing easier, data items are brought together to form a unit called a "record". A group of records makes up a "file".

recovery
The process of returning a system to operable condition following a failure.

reel
A magnetic tape volume or the tape and the spool on which it is wound.

registration
The process of recording information about individual patrons for the Circulation system, and especially of assigning barcode numbers to those patrons. Usually, "patron registration" applies to the initial entry of this information onto the system.

release
Release refers to a particular version of a package of software: for example, Release 5.0 of ADVANCE.

remote
A term applied to a device or operation that is geographically-separated from a computer but communicates with it.

renewal
The process whereby a borrowed item is checked out again to the same patron, effectively extending the loan period.

report
A result of processing in which data from various data fields is selected and presented in a particular way to provide certain pre-defined information to the user. The hard copy of this data is printed as a "report".

reserve
A "reserve collection" is also known as "short loan collection". In academic libraries, a type of material in high demand that has short loan periods assigned to it. Reserve is often applied to required course reading materials, or to new or topical items.

The term "reserve" is sometimes used by public libraries to mean *hold*.

reserve book room
"RBR" is a function within the Circulation module designed to handle high-use materials in the reserve collection, often items associated with a course. It allows the user to enter instructor and course information, and links titles with the appropriate courses.

reserve recall
An item is recalled for the Reserve Book Room.

response time Used in connection with computer systems. The amount of time it takes for an online system to give data requested of it. It is measured as the amount of time between the point when a user presses the ENTER or RETURN key and the point when the first character of response appears on the screen.

restore To replace something which has been removed, deleted or damaged. Restoration is part of recovery, and usually refers to the process of replacing disk files with the backup copies on tape.

S

scanning Also "wanding". The act of drawing the lightpen across a barcode to read the barcode into the system.

security level The level assigned to each function, command, and override in order to restrict its usage. Only those functions and commands having a priority level at or below the operator's active access level may be used.

"see also" reference A reference from an established form of a heading to one or more related headings. Also known as a "see also" cross reference.

see reference A reference to the established form of a name from a form which should not be used as a heading. Also known as a "'see' cross reference", "rejected form heading", or "variant form heading".

serial A publication issued in successive parts bearing numerical or chronological designations and intended to be continued indefinitely. This includes periodicals, newspapers, annuals, etc. In ADVANCE, a serial is a *bibliographic item* (catalogued in the Cataloguing module) which may also have a *publication pattern* and *copy set* defined in the Serials module. A serial may also have *pieces* (barcoded items) assigned to it. Also see the definitions of *issue*, *copy*, and *holdings*.

Serials module The ADVANCE module that automates serials control — primarily checkin and issue prediction.

shelf list A catalogue of the items in a library; items are described in the same order that they are arranged on the shelves.

shelf location Also "local call number". The *call number* assigned to a specific copy of an item.

sign off	Also "log off" and "logging off". To enter the necessary information to end a session on a terminal. The console command is "OFF". Compare to *sign on*.
sign on	Also "log on", "log in", and "logging on". To enter the necessary information (such as an identification number or password) to begin a session on a terminal. The console command is entry of a valid account name.
site	Customer library, usually where the computer is located.
sort	To arrange entities according to some pre-defined criteria, usually alphabetic.
spine label	Label for the spine of a book, typically with the call number.
string	Any succession of characters. These can be numbers, letters, blanks, or other characters. The PICK system treats most data simply as a sequence of symbols or "string".
subfield	In MARC format, the name for a defined part of the field in a MARC *variable-length field*, such as subfield b.
subfield code	The one-character code which identifies a MARC subfield: for example, the "a" in "‡a".
subject headings	Authorized terms that describe the contents of a book. Several may apply to a single work. One North American standard is LC Subject Headings.
surcharge	The charge automatically levied against a patron to cover certain costs, such as the cost of postage for notices, or ordering and cataloguing a replacement book.
syndetic structure	The logical organization of the catalogue, using *"see"* and *"see also" references* to interrelate the concepts represented in the catalogue.
SYSPROG	System Programmer. The highest-level account within PICK.
system backup	To copy (back up) all the files making up the system.
system manager	The library staff member responsible for the systems staff and the computer.

T

tag	The labelling mechanism used by MARC to associate data elements with their functions. Tags are composed of three digits: for example, "210" is the tag for the Abbreviated Title Field. Each different tag represents a different piece of bibliographic information: e.g., personal author, uniform title. "Tag" is sometimes used to mean MARC field.
tag number	A term sometimes used to mean *tag*.
tape	A magnetic tape reel or cassette, or the tape on the reel or cassette.
tape backup	The process of making a copy of data files and/or the system software. The library uses the backed-up tapes as a security precaution, in case the need for a 'restore' arises.
tape drive	The equipment that holds, reads from, and writes to magnetic tapes.
TCL	"Terminal Control Language" processor. TCL is the primary interface between end-users and the computer. The state in which the computer *prompt* is displayed and is waiting for user input is commonly called being "at TCL".
telecommunications	The organization and facilities that provide communications service between users in geographically separated locations. The term encompasses telephone, telegraph, radio, and satellite-based systems; unless otherwise indicated, telephone is usually assumed.
terminal	A device used by a person to communicate with the computer.
Terminal Number	Each terminal in a library system is assigned a unique number.
title	The name of a work, including any alternate title, subtitle, or other associated descriptive matter preceding the author, edition, or imprint statement on the title page.
tracing	Any record of entries or references that have been made in connection with the cataloguing of a particular work or publication, or with establishing a particular heading. Also known as subject headings or added entries.
track	A unit of data storage space on disk.

transfer	To read data in one location and write it in another location.
transaction	Any checkin, checkout, renewal, or hold.

U

UK/MARC	The United Kingdom version of the MARC format.
UNIX	A computer *operating system* developed by Bell Laboratories.
upload	The data flow from the microcomputer **up** to the host computer system.
UPS	"Uninterruptable Power Supply" — essentially a series of batteries that conditions the power to the computer, and, with the absence of electricity, provides power to the computer for a period of time (e.g. 30 minutes.)
user	Same as *patron*.
US/MARC	The version of the MARC format used in the USA.

V

variable-length field	Also "variable field". A MARC field in a bibliographic record whose length is not pre-defined: for example, the Title Statement Field (Tag 245). A variable field is composed of two one-digit *indicators* and one or more *subfields*.
vendor	A dealer, wholesaler, or other organization supplying books or other materials to the library.
volume	Bibliographic element of a series. For example, **The Art of Computer Programming** has three volumes. The important point is that volumes normally share SOME bibliographic elements with each other.
voucher	A request for the complete or partial payment of one or more invoices, usually sent to the library's financial services department.

W

wand	Device for reading barcodes. Known as *lightpen*.
wanding	Known as *scanning*.

WLN   "Western (formerly "Washington") Library Network" — a bibliographic utility.

word   A unit of data storage: 8, 16, or 32 bits depending on the computer.

work file   A file where data is temporarily stored before being placed in the database. Used in the Cataloguing module.

Screen Index

S

T

U

General Index

Symbols

Numbers

A

B

C

Holdings User's Guide   (*September 2000*)

Holdings User's Guide   (*September 2000*)

Holdings User's Guide   (*September 2000*)

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