

Novanet Training Documentation

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The below instructions are based on the user already being in the holdings menu. Holdings can be accessed by entering the code CEHI from the Cataloguing or Serials modules. Cataloguers can access holdings from BSR by selecting a bib record, retrieving it, then selecting "holdings edit".

The exercises that involve adding the first single part or multi part piece require a bib without any holdings information. For training purposes the easiest way to accomplish this is to copy catalogue a bibliographic record. Here are the instructions:

1. From the Cataloguing Module select "BSR"
2. Find an appropriate non-serial bibliographic record (e.g. t=wolf willow)
3. Retrieve
4. Copy Catalogue
5. File
6. Use code "3" for indexing into the main database and index.
7. A bib record without holdings will now exist for this title.

1. SINGLE-PART HOLDINGS

1.1 Adding the First Piece

1. Select "Holdings Edit" [To go to the Holdings module]
2. Select "Single Part" [the Holdings type]
3. This takes you to the Pieces Summary screen
4. Select Add Item [Add a Pieces record]
5. Enter the Barcode on line 1.
6. From line 2. (Current Location), open the editing window [C]
7. Enter the Institution, Sublocation, Collection, Call number prefix, Call number, Call number suffix, and Copy number
8. Enter C at line 3 (Owning Location) and enter Institution and Sublocation
9. Enter the Circ. code on line 5.
10. [File]
11. Update owning info.? Y

1.2 Adding Additional Pieces

1. Select "Holdings Edit" [To go to the Holdings module]
2. Select "Pieces Display" to go to the Pieces Summary screen
3. Select "Add Item" [Add a Pieces record]
4. Enter the Barcode on line 1.
5. From line 2. (Current Location), open the editing window [C]
6. Edit the Current Location subfields
7. Enter C at line 3 (Owning Location) and enter Institution and Sublocation
8. Edit the Circ. code on line 5.
9. [File]
10. Update owning info.? Y

1.3. Updating "In Processing" Pieces

1. Select "Holdings Edit" [To go to the Holdings module]

2. Select "Pieces Display" to go to the Pieces Summary screen
3. Highlight "# Item" and enter desired number [Select the "In Processing" Piece]
4. Change the Status [Status]
5. New item status code? 0
6. File this status? Y
7. Status code to delete? *
8. [File]

1.4. Generic Editing of Single Part Monographs

1. Select "Holdings Edit" [To go to the Holdings module]
2. Select "Pieces Display" to go to the Pieces Summary screen
3. Enter the number of the piece you want to edit.
4. Enter "2" to open the Current Location editing window IF you want to edit location information for the current location (Institution, Sublocation, Collection Code, Call # Prefix, Call # Suffix, Copy #)
- OR**
4. Enter "3" to open the Owing Location editing window IF you want to edit location information for the owning location (Institution, Sublocation, Collection Code, Call # Prefix, Call # Suffix, Copy #)
- OR**
4. Edit any other pieces fields [e.g. circ code on line 5]
5. File
6. Update owning info.? Y [the prompt only appears if you have changed the current location information]

1.5. Changing Location Information

1. Select "Holdings Edit" [To go to the Holdings module]
2. Select "Pieces Display" to go to the Pieces Summary screen
3. Select "# item" and enter the number of the Piece you wish to update
4. From line 2. (Current Location), open the editing window [C]
5. Change the Current Location subfields
6. Enter C at line 3 (Owing Location) and enter Institution and Sublocation
7. Change the Circ. code on line 5 if required
8. [File]
9. Update owning info.? Y, unless this is a temporary relocation

1.6. Moving Pieces to Other Bibliographic Records

1. Select "Holdings Edit" [To go to the Holdings module]
2. Select "Pieces Display" to go to the Pieces Summary screen
3. Select "Move #(s)" and the Piece(s) to be moved [Move #(s)]
4. New Bibliographic record or new Location? B
5. Move it / them? Y
6. Search for new Bibliographic record
7. [Retrieve]

1.7. Deleting Pieces

1. Select "Holdings Edit" [To go to the Holdings module]
2. Select "Pieces Display" to go to the Pieces Summary screen
3. Select the Piece(s) to be deleted [Delete item(s)]
4. Delete it / them? Y
5. [Exit]

1.8. Changing the General Holdings Type (Single-Part to Multi-Part)

1. Select "Holdings Edit" [To go to the Holdings module]
2. Select "Pieces Display" to go to the Pieces Summary screen
3. Select the new General Holdings type [Multipart/Serial]
4. You already have pieces. Okay to continue? Y
5. Holdings will be converted. Okay to continue? Y
6. Select "Go To"
7. Select "Type of holdings display" [Type of Holding Summary screen]
8. Select the Type of Holding record [# item]
9. Describe the Type of Holding on line 1., e.g.: Volumes (or Indexes or Supplements)
10. [File]
11. Select "Go To"
12. Select "Publication pattern" [Publication Pattern Summary screen]
13. Select the Publication Pattern record [# item]
14. Enter the Volume caption(s) on line 1., e.g.: v. pt. (unit)
15. Enter a blank space on line 7. (Regularity Pattern)
16. If there is the possibility that any of the levels may be lacking on some Volumes, go to the [Second screen] and type 3 in line 6. (Caption Evaluation) and [Accept]
17. [File]
18. Predict issues? N
19. Compress? Y for single-level, consecutive volumes
N for multi-level or non-consecutive volumes
20. Retain old record? N
21. Select "Go To"
22. Select "Parts Display" [to the Parts Summary screen]
22. Select the Part record [# item]
23. Enter the numbering for the Part on line 3., e.g.: v. : 1 pt. : a
24. [File]

2. MULTI-PART MONOGRAPHIC HOLDINGS

2.1. Adding the First Volume

1. Select "Holdings Edit" [To go to the Holdings module]
2. Select "Multipart/Serial" [the General Holdings type]
3. Select "Pub. pattern display" [Establish the Publication Pattern]
4. Select "Add Item" [Add a Publication Pattern record]
5. Select "Add Item" [Add the Type of Holding to the Publication Pattern record]
6. Describe the Type of Holding on line 1., e.g.: Volumes (or Indexes or Supplements)
7. File [Return to the Publication Pattern Detail record]
8. Enter the Volume caption(s) on line 1., e.g.: v. pt. (unit)
9. Enter a blank space on line 7. (Regularity Pattern)
10. If there is the possibility that any of the levels may be lacking on some Volumes, go to the

- [Second screen] and type 3 in line 6. (Caption Evaluation) and [Accept]
- 11.[File]
 - 12.Predict issues? N
 - 13.Compress? Y for single-level, consecutive volumes
N for multi-level or non-consecutive volumes
 14. Select "Go To"
 15. Select "Pieces Display" [Go to the Pieces Summary screen]
 16. Select "Add Item" [Add a Pieces record]
 - 17.Enter the Barcode on line 1.
 - 18.From line 2. (Current Location), open the editing window [C]
 - 19.Edit the Current Location subfields
 20. File
 21. From line 3. (Owning Location), open the editing window [C]
 - 22.Edit the Owning Location subfields
 - 23.From line 4. (Volume/Part#), open a linking window [??]
 24. Select Link [to the established Publication Pattern]
 25. Highlight "Insert at line #" and type the number "1" [Establish the Part enumeration]
 26. From line 1., choose the Type of Holding record [??]
 27. Select "Retrieve #"
 - 28.Enter numbering for the Part on line 3., e.g.: v. : 1 pt. : a
 - 29.[File]
 30. Select "Accept" [Verify the link to the Part]
 - 31.Complete the Pieces record, e.g. Circ. code, Public note, etc.
 - 32.[File]
 - 33.Update owning info.? Y

2.2. Adding Additional Volumes to the First Location Copy (only one location copy exists)

1. Select "Holdings Edit" [To go to the Holdings module]
- 2.Select "Pieces display" [Go to the Pieces Summary screen]
- 3.Select "Add item" [Add a Pieces record]
- 4.Enter the Barcode on line 1.
- 5.From line 4. (Volume/Part #), open a linking window [??]
- 6.Select Link [to the established Publication Pattern]
7. Select "Insert at line #" [Select Proper One]
- 8.Enter numbering for the Part on line 3.
- 9.[File]
- 10.Verify the link to the Part [Accept]
- 11.Complete the Pieces record, e.g. Circ. code, Public note, etc.
- 12.[File]
- 13.Update owning info.? Y

2.3. Adding the First Volume to New Location Copies
(*Only works for preexisting volume #s)

1. Select "Holdings Edit" [To go to the Holdings module]
- 2.Go to the Pieces Summary screen [Pieces display]
- 3.Add a Pieces record [Add item]
- 4.Enter the Barcode on line 1.
- 5.From line 2. (Current Location), go to the Location Copy Summary screen [??]
- 6.Add the new Location [Add item]
- 7.Complete the Location record
- 8.[File]

9. From line 3. (Owning Location) enter "C" to edit the Owning Location
10. From line 4. (Volume/Part #), open a linking window [??]
11. Link to the established Part [Link]
12. "Retrieve Item" [Choose the Part enumeration]
13. Verify the link to the Part [Accept]
14. Complete the Pieces record, e.g. Circ. code, Public note, etc.
15. [File]
16. Update owning info.? Y

2.4. Adding Subsequent Volumes to Location Copies

1. Select "Holdings Edit" [To go to the Holdings module]
2. Go to the Pieces Summary screen [Pieces display]
3. Add a Pieces record [Add item]
4. Enter the Barcode on line 1.
5. From line 2. (Current Location), go to the Location Copy Summary screen [??]
6. Select the Appropriate Location Copy.
7. From line 3. (Owning Location) enter "C" to edit the Owning Location
8. From line 4. (Volume/Part #), open a linking window [??]
9. Link to the established Part [Link]
10. "Retrieve Item" [Choose the Part enumeration]
11. Verify the link to the Part [Accept]
12. Complete the Pieces record, e.g. Circ. code, Public note, etc.
13. [File]
14. Update owning info.? Y

2.5 Adding Subsequent Volumes With "Different" Volume Numbers to Location Copies

(e.g have two location copies with vol 1 and 2 for each. Then vol 3 comes in.)

1. Select "Holdings Edit" [To go to the Holdings module]
2. Go to the Pieces Summary screen [Pieces display]
3. Add a Pieces record [Add item]
4. Enter the Barcode on line 1.
5. From line 2. (Current Location), go to the Location Copy Summary screen [??]
6. Select the Appropriate Location Copy [Retrieve #]
7. From line 4. (Volume/Part #), open a linking window [??]
8. Link to the established Part [Link]
9. "Insert at Line #" [Select Proper One]
10. Enter numbering for the Part on line 3.
11. File
12. Verify the link to the Part [Accept]
13. Complete the Pieces record, e.g. Circ. code, Public note, etc.
14. [File]
15. Update owning info.? Y

2.6 Changing the Status of "In Processing" Volumes

1. Select "Holdings Edit" [To go to the Holdings module]
2. Go to the Pieces Summary screen [Pieces display]
3. Select the "In Processing" Volume [# item]
4. If applicable, replace the Nbarcode.
5. Change the Status [Status]

- 6.New item status code? 0
- 7.File this status? Y
- 8.Status code to delete? *
- 9.[File]
- 10.[Exit]

2.7 Changing the Location of an Entire Multipart Set

1. Select "Holdings Edit" [To go to the Holdings module]
- 2.Select "Locations display"
- 3.Select the appropriate location copy record
4. Change the institution, sublocation, collection code as applicable
5. Update owning info from current info for attached PIECES (Y/N) ? Y
6. If the circulation code or status of the individual volumes needs to be changed, select "Go to", then select "Pieces Display", then select and edit each of the pieces.

2.8 Changing the Location of One or More (but not all) Pieces in a Multipart Set

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

1. Select "Holdings Edit" [To go to the Holdings module]
2. Select "Locations display"
- 3.Select the location copy that the piece will be moved from
- 4.Select "Pieces/Parts"
- 5.Select "Move", then enter the number(s) of the pieces to be moved.
6. Move to new Bibliographic record (B) or to new Location (L)? L
- 7.Move it/them? Y
- 8.If a location copy record for the new location exists, select the appropriate location copy record, then continue with steps 9-12. If there is no location copy record for the new location, jump to steps 13-20 below.
9. Update owning info from current info for attached PIECES (Y/N) ? Y
10. Exit
11. Exit
12. If the circulation code or status of the individual volumes needs to be changed, select "Go to", then select "Pieces Display", then select and edit each of the pieces.
13. If there is no location copy record for the new location, select "Add item"
14. Enter the appropriate institution, sublocation, etc.
15. File
16. Select the newly created location copy record from the list
17. Update owning info from current info for attached PIECES (Y/N) ? :y
18. Exit
19. Exit
20. If the circulation code or status of the individual volumes needs to be changed, select "Go to", then select "Pieces Display", then select and edit each of the pieces.

2.9. Changing the Sequence of Volumes

1. Select "Holdings Edit" [To go to the Holdings module]
- 2.Go to the Type of Holdings Summary screen [Type of holdings display]
- 3.Select the Type of Holdings record [# item]
- 4.Go to the Parts Summary screen [Parts]
5. Ask to sequence the Volumes [Sequence parts]
6. Select the Volume(s) to be moved [# line(s) to move]

7. Select the line above which the Volume(s) should be positioned [Drop at line #]
8. File

2.10. Deleting One or More Volumes For a Location (but not all volumes for this location)

Note: So the goal is to delete volumes but retain the location copy.

1. Select "Holdings Edit" [To go to the Holdings module]
2. Select "Pieces Display"
3. Select "Delete item(s), then type the line numbers of the volumes you want to delete.

NOTE: PARTS SHOULD NEVER BE DELETED

2.11. Deleting All Volumes For One or More Locations

1. Select "Holdings Edit" [To go to the Holdings module]
2. Select "Locations Display"
3. Select "Delete item(s), then type the numbers of the location copy you want to delete
4. Warning: Location copy at line 1 has pieces/parts attached. Press Enter.
5. 1 of 1 can be deleted. Delete it (Y/N)? Y deletes both the location copy and the pieces linked to it.

NOTE: PARTS SHOULD NEVER BE DELETED

2.12. Changing Holdings Format from Multipart to Single Part

Note: to make this change, all pieces must first be deleted, then added again

1. Record all the information you'll need to add pieces later.
2. Delete all location copies and the pieces attached (for details, see Deleting All Volumes For One or More Locations)
3. Select "Go To"
4. Select "Type of Holdings Display"
5. Select "Delete item(s)", then enter the numbers for all of the Type of Holdings records.
6. 1 of 1 can be deleted. Delete it (Y/N)?
7. Select "Go to"
8. Select "Single-part"
9. Add pieces (for details, see Part I, Adding the First Piece).

2.13 Compressing or Expanding System Generated Holdings For Multipart Monographs

Note: Never compress if there is a gap in the holdings of any institution attached to that publication pattern. When you compress or expand you will be affecting the pub pattern and thus all volumes (all institutions holdings) which are attached to that pub pattern. A policy for compressing/expanding multipart monographs needs to be developed by the appropriate committees.

1. Select "Holdings Edit" [To go to the Holdings module]
2. Select Publication Pattern
3. Pull up desired publication pattern

4. Select "Second Screen"
5. On line 5 [Compress/Expand] select "2" to compress the holdings or "0" to expand already compressed holdings.
6. Accept
7. File
8. Is this publication pattern going to be used to predict issues? N
9. Can holdings data for this publication pattern be compressed? Y or N depending on whether you are compressing or expanding
10. Do you want to retain the old record? (Y/N) N

2.14 Changing From System Generated to Manual Summary Holdings Statement

Note: Remember that if using a manual summary holdings statement that this needs to be change to reflect your holdings when you add to the collection.

1. Select "Holdings Edit" [To go to the Holdings module]
2. Locations Display
3. # Item
4. Holdings Statement
5. # Item
6. On line [type] one enter "1" to select manual override (manual summary holdings)
7. On line 2 type your summary holdings note.
8. Accept
9. Accept
10. File

3. Adding a second publication pattern to a location copy (e.g., adding supplements to a multi-volume set)

3.1 To create a 2nd type of holding, 2nd publication pattern, and the first part for the new publication pattern:

1. Select "Holdings edit"
2. Select "Type of Holdings display"
3. Select "Add item"
4. line 1: Description – enter text to be displayed in OPAC (Supplements, etc.)
5. line 3: ?? (Options: 0 - ISS, 1 - IND, 2 - SUP)
6. Select "Patterns"
7. Select "Add item"
8. Fill in enumeration or chronology as appropriate (e.g., enter (year) in chronology)
9. Line 7: Regularity Pattern – enter a space
10. If there is the possibility that any of the levels may be lacking on some Volumes, select "Second Screen" and type 3 in line 6. (Caption Evaluation), then select "Accept".
11. [File]
12. Predict issues? N
13. Compress? Y for single-level, consecutive volumes
N for multi-level or non-consecutive volumes
14. [Exit]
15. Select "Parts"
16. Select "Insert at line # ", then type 1
17. Line 3: Enumeration/Chronology:
18. [File]
19. [Accept]

20. [File]
21. [Exit]
22. [File]

3.2 To link the first piece to the first part:

Note: steps 5 & 6 optional when only one location copy on bib record

1. Select "Go to"
2. Select "Pieces display"
3. Select "Add item"
4. Line 1: Enter the barcode
5. Line 2 (current location): ?? to go to the Location Copy Summary screen
6. "Retrieve # ", then select the appropriate location copy
7. Line 4: ??
8. Select "Link"
9. Select "Retrieve item"
10. [Accept]
11. Complete the piece record (e.g., circ code, etc.)
12. [File]
13. Update owning information from current? Y

3.3 To add the next piece and part:

Note: steps 4 & 5 optional when only one location copy on bib record

1. Select "Pieces display"
2. Select "Add item"
3. Enter barcode
4. Line 2 (current location): ?? to go to the Location Copy Summary screen
5. "Retrieve # ", then select the appropriate location copy
6. Line 4: ??
5. Select "Link"
6. Select "Insert at line # ", then type the number of the line that the piece should be filed after
7. Enter the enumeration/chronology
8. [File]
9. [Accept]
10. Complete piece record (e.g., circ code, etc.)
11. [File]
12. Update owning information from current? Y

4. Adding a new location copy with a different publication pattern (to handle materials housed in two different locations that require two different publication patterns)

1. Select "Holdings edit"
2. Select "Locations display"
3. Select "Add item"
4. Enter appropriate institution, sublocation, collection code, etc.
5. [File]
6. To continue, follow the steps above under **Adding a second publication pattern to a location copy.**