



Traverse des Sioux Library System

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9/10/07/kg/jd/kg

Procedures for Adding Periodicals That Do Not Have Serial Control Records

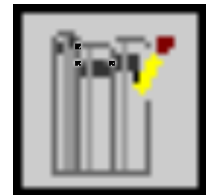
Adding new issues to an existing periodical title held by you or another library

Note: Set the Class scheme to LCPER on your Properties screen before adding periodicals. All periodical call numbers must have a class scheme of LCPER for correct display and sorting.

In the Circulation toolbar:

Click: Item Information and Maintenance group of wizards

- Click: Call number & item maintenance wizard
- Search: Use the title or another available search
- Click: The matching title to highlight it
- Click: Modify button at the bottom of the screen
- Choose: The issue you want to use as a pattern to Add a Call Number for the new issue and highlight it. Make sure that the one you choose has a class scheme of LCPER and that the pipe z occurs immediately following the word Periodicals, as shown in the examples below.
- Click: Add Call Number box at the bottom of the screen
- Choose: Find and click your library's code in the Add volume: Library for new Call number box
- Verify that your library code is in the Add volume: Library for new Call number box.
- OK
- Enter: Item ID, Material type, Home and Current locations, Item categories 1 & 2
- Click: Save
- Choose: Highlight the Call number of the item you have just added (the Call Number would be directly above the highlighted Item ID you just entered)
- Enter: New Call number if different from the one that you duplicated in the preceding steps.
 - Example: Periodicals|zV. XXX NO. XX MMM DD YYYY
 - Example: Periodicals|zV. 168 NO. 4 APR 1 2005
 - Example: Periodicals|zV. 212 DEC 25 2001



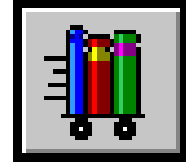
Note: Place the "pipe" (Shift key with the key directly above the Enter key) and a subfield "z" before the volume number. Be sure to put a space between the number of the volume and the "No." as shown above, or your issues will not sort correctly in the iBistro display.

Click: Save

Transferring periodical issues that were originally entered as brief records

In the Circulation toolbar:

- Click: Item Information and Maintenance
- Click: Transfer Titles, Call Numbers, or Items icon
- Search: The Item ID number to find the brief record
- Click: The matching title to highlight it
- Click: Add to tree
- Search: Use the title or another available search for the periodical record that will receive the transfer
- Click: The matching title to highlight it
- Click: Add to tree
- In the Transfer window pane: Click: The **Call Number** of the brief record to be transferred. **Do not highlight the Item record (Barcode).**
- Click: Retain for transfer button. What will be transferred is now in bold and italic type.
- In the Transfer window: Click: The **Call Number or Title** that will receive the transfer and highlight. **Do not highlight the Item record (Barcode).**
- Click: Transfer
- Warning message: Message indicates that the Call Number will be removed if the Item is transferred.
 - If the title to be transferred has a Title Control number beginning with “a” it can be removed.
- Click: Yes



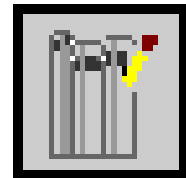
Note: The Transfer Operation Results screen will indicate that the transfer was successful and the transferred title (brief record) will disappear from the Transfer Tree pane. The Transferred Call Number should still be visible but will now be a separate Call Number connected to the record it was transferred to. The Call number and holding library will remain the same as before the transfer. A message will appear for the brief record to indicate it is no longer available for display.

- Click: Remove from tree

If necessary, edit the Call Number of the transferred record to indicate the new or changed Call Number

In the Circulation toolbar:

- Click: Item Information and Maintenance
- Click: Edit existing Volumes and Call Numbers
- Search: Use the title or another available search
- Click: The matching title to highlight it
- Click: Modify button at the bottom of the screen
 - Do not click: Add a Call Number. You have already done that with the transfer.
- Choose: The issue you have just transferred and highlight it
- Click: The Call Number to be edited to highlight it (the Call Number just added would be directly above the Item ID you just entered)
- Enter: New Call number
 - Example: Periodicals|zV. XXX no. XX MMM DD YYYY
 - Example: Periodicals|zV. 123 NO. 7 SEP 1 2005
 - Example: Periodicals|zV. 212 DEC 25 2001



*Note: Place the “pipe” (Shift key with the key directly above the Enter key) and a subfield “z” before the volume number. **Be sure to put a space between the number of the volume and the “No.”** as shown above, or your issues will not sort correctly in the iBistro display.*

- Click: Save

Note: This does not change the barcode number nor affect the circulation statistics associated with this barcode number. If necessary, the Item information may need to be edited to show the correct Material type, Home and Current locations, and Item categories

*Note: In order for the list of periodical issues to display in the proper order, the Class scheme in the box to the right of the Call Number must be **LCPER**. If it is any other class scheme, change it to LCPER.*

Unsuccessful Transfers

Note: If the transfer was unsuccessful, the Transfer Operation Results screen will indicate that the transfer failed and why it failed. Make the appropriate changes to the procedure, and try again.