

INTRODUCTION

Introduction

This tutorial introduces the management of serials using the Millennium Serials module and the Serials Check-in mode.

Millennium Serials can maintain your library's holdings for all types of serials, including periodicals, journals, newspapers, government documents, and monographic series. Media other than paper (e.g., microfilm, electronic) and all frequencies (regular, normalized irregular, and irregular) can be supported.

The screenshot shows the Innovative Interfaces search results page. At the top, there are navigation links: Home | New Search | Login | Help. Below this is a toolbar with icons for Start Over, Request, Save Records, MARC Display, Return to List, Limit/Sort Search, and Another Search, along with a Search History dropdown. The search results section shows a search for 'against the grain' with a 'View Entire Collection' dropdown and a 'System Sorted' dropdown. A checkbox option 'Limit search to available items' is present. Navigation buttons for 'Previous' and 'Next' are shown. The main results area displays the title 'Against the grain (Charleston, S.C.)' and 'Against the grain.' with an imprint '[Charleston, SC : Katina Strauch, c1989-]'. To the right, there is an 'Additional Info' section with a star rating and a 'More Resources' section with 'Other Resources' and 'More Information' buttons. At the bottom, there are tabs for 'Copy Status', 'More Details', and 'Find Similar Items'. The 'Copy Status' tab is active, showing 'Coverage' for volumes 1 through 17 and a 'Latest Received' date of April 2006 for volume 18, number 2.

A serials holdings record is attached to a bibliographic record. There can be more than one holdings record (e.g. for paper, online, and microform versions of the same serial title, for different locations, or different Serials Units).

The bibliographic record must be in your database before you can begin. Bibliographic records may already exist, be imported from a Bibliographic Utility (i.e. OCLC) and/or Z39.50, provided by your serials vendor, or manually keyed in.

NOTE: The earlier term for the '**Holdings Record**' was the '**Checkin Record**'. The Innovative Guide & Reference and other documentation may have references to both terms.

The Holdings record consists of 6 tabs: Summary, Record, Card, Holdings, Routing, and Bib-level Holds.

The Summary tab displays a summary of all holdings records attached to a specific bibliographic record.

The Bib-level holds tab allows you to place and display holds on a title.

The tutorial will concentrate on the remaining 4 tabs:

1. Record tab
2. Card tab
3. Holdings tab
4. Routing tab

1. The Record tab contains the Holdings record fixed-length fields display in the top portion and the variable-length fields display in the bottom portion.

b11800938

Title Against the grain (Charleston, S.C.)
 Title Against the grain.
 ISN 1043-2094
 Publication Info. [Charleston, SC : Katina Strauch, c1989-
 Locations iu
 Holdings 1 1-4 1989 03-11
 Holdings 2-7 1-5 1990-1995 02-11
 Holdings 8-16 1-6 1996-2004/2005 02-12/01

Summary Record c10069070 Card c10069070 Holdings c10069070 Routing c10069070(4) 0 Bib-Level Holds

c10069070 Last Updated: 01-15-2007 Created: 12-06-2006 Revisions: 14

Label Type	NO LABEL	Claim On	01-25-2007	Serial Code 3	a PURCHASE
Serial Code 1	b BIMONTHLY	Location	iuper IU Periodicals	Operator	- ---
Serial Code 2	g INDEFINITE	Recv Location	j UNIVERSITY PER	Update Count	i INCREMENT
Copies	1	Vendor	ebSCO EbSCO Subscriptions Services	Piece Count	7

MARC Leader #####ny 22#####3n 4500

Captions 852 | niuper
 Captions 853 | |81|av.|bno.|i(year)|j(month)
 Holdings 863 | |81.1|a1|b1-4|i1989|j03-11
 Holdings 863 | |81.2|a2-7|b1-5|i1990-1995|j02-11
 Holdings 863 | |81.3|a8-16|b1-6|i1996-2004/2005|j02-12/01
 Holdings 863 | |81.4|a17-|b1-|i2006-|j02-

2. The Card tab displays the Checkin card associated with the currently selected Holdings record. The tab heading shows the record number of the Holdings record.

b11800938

Title Against the grain (Charleston, S.C.)
 Title Against the grain.
 ISN 1043-2094
 Publication Info. [Charleston, SC : Katina Strauch, c1989-
 Locations iu

Summary Record c10069070 Card c10069070 Holdings c10069070 Routing c10069070(0) 0 Bib-Level Holds

Check-in date Create item Update Holdings? ▼

Feb 2006 LATE 03-01-2006 v.18 no.1	Apr 2006 LATE 05-01-2006 v.18 no.2	Jun 2006 LATE 07-01-2006 v.18 no.3	Sep 2006 LATE 10-01-2006 v.18 no.4	Nov 2006 EXPECTED 12-01-2006 v.18 no.5	Dec 2006/Jan 2007 EXPECTED 01-01-2007 v.18 no.6
---	---	---	---	---	--

3. The Holdings tab contains the holdings information for the Holdings record that is currently selected. The tab heading shows the record number of the selected record

b11800938	
Title	Against the grain (Charleston, S.C.)
Title	Against the grain.
ISN	1043-2094
Publication Info.	[Charleston, SC : Katina Strauch, c1989-
Locations	iu
Holdings	1 1-4 1989 03-11
Holdings	2-7 1-5 1990-1995 02-11
Holdings	8-16 1-6 1996-2004/2005 02-12/01
Holdings	17- 1- 2006-



Summary	Record c10069070	Card c10069070	Holdings c10069070	Routing c10069070(0)	0 Bib-Level Holds
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OPAC View

Issues	Supplements	Indexes
---------------	--------------------	----------------

v.1:no.1(Mar 1989)-v.1:no.4(Nov 1989), v.2:no.1(Feb 1990)-v.7:no.5(Nov 1995),
v.8:no.1(Feb 1996)-v.16:no.6(Dec/Jan 2004/2005), **v.17:no.1(2006)-**

Selected Range

Gap break separator Open-ended

From v. <input type="text" value="17"/> no. <input type="text" value="1"/> Month/Season Day Year <input type="text"/> <input type="text"/> <input type="text" value="2006"/>	To v. <input type="text"/> no. <input type="text"/> Month/Season Day Year <input type="text"/> <input type="text"/> <input type="text"/>
--	--

Note **Nonpublic Note**

Below the toolbar is the public view of the holdings statement. Millennium Serials shows you exactly how the holdings data will display to the public in Web OPAC. The OPAC View contains three tabs - Issues, Supplements, and Indexes. You can choose a tab to view the holdings each.

Below the OPAC View box is the Selected Range. When you click a holdings range in the OPAC View, Millennium Serials displays the COVERAGE (or LIB HAS) data for that range in the Selected Range area.

4. The Routing tab displays the individuals to whom this serial is routed. The tab heading shows the record number of the Holdings record.

b11800938

Title **Against the grain (Charleston, S.C.)**
Title **Against the grain.**
ISN **1043-2094**
Publication Info. **[Charleston, SC : Katina Strauch, c1989-**

Locations **iu**

Holdings **1 1-4 1989 03-11**
Holdings **2-7 1-5 1990-1995 02-11**
Holdings **8 16 1 6 1006 2004/2005 02 12 01**

Summary	Record c10069070	Card c10069070	Holdings c10069070	Routing c10069070(4)	0 Bib-Level Holds
				Add	Delete

Copy 1
Chou, Yu-Lan
Fujikawa, G...
Mogilivets,...
Gee, Michael

[close window](#)

INTRODUCTION

Navigation & Requirements

- At the bottom of each page are links to the next and previous pages. We recommend you follow through the tutorial steps using the **NEXT PAGE** → and ← **PREVIOUS PAGE**.
- At any time you can select from the drop down menus on the navigation bar across the top of each page.
- Within pages there are links to other pages in the tutorial. Use your browser's **Back** button to return to your previous place in the tutorial.
- Links to pages outside the tutorial open in a separate browser window. To return to the tutorial, close the external link window, or click on the tutorial window to make it active.
- **HOT TIP** is used to highlight information that either illustrates or expands a point in the tutorial text.

RECOMMENDED SOFTWARE AND HARDWARE SETTINGS:

- Web browser: Netscape Communicator v.4.5 or above; Internet Explorer v.4.5 or above; Mozilla Firefox 1.5 or above

For optimal viewing:

- Web browser: Netscape Communicator v.6.0 or above; Internet Explorer v.5.5 or above
- Monitor setting: 1024 x 768 resolution or higher, with browser window maximized
- Colors: at least 256 or higher

PRINTING

You can print individual tutorial pages and screens from within a Web browser using the '**Print this page**' icon



Customers may also download and print this tutorial as a [PDF](#) document. To view and print it you need Adobe Acrobat Reader

software which you can download from

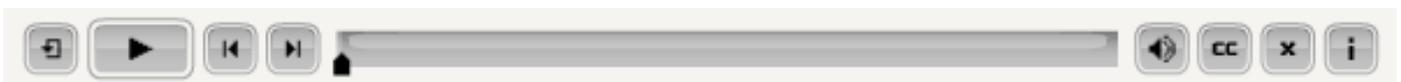
**URL LINKS**

This tutorial has two sets of links - [internal](#) and external.

They have distinguishing colors for easy recognition. Internal links are linked within this tutorial and external links lead to the outside resources.

DOWNLOADING

Animation examples are included on some pages. To view them you need the Flash plugin on your computer. You can download the latest Flash from Adobe [Flash Player](#) Download Center. Please ensure that your browser allows popups in order to view the animation. Use playback control to pause, rewind or stop the Flash animation. ensure that your browser allows popups in order to view the animation. Use playback control to pause, rewind or stop the Flash animation.



Customers who would like to mount this tutorial on a local server for the use of their staff, without having to allow them full access

to CSDirect, may download the tutorial as a [ZIP](#) (size of ----) file.

After the file has been downloaded and unzipped into the Local directory of choice you will see a list of individual html pages. Double click to open a page called index.html and the tutorial will be accessible. Once it has been downloaded locally, you may choose to open it in a web editor and insert local policies, practices or notes.

Please note that internal links to the Innovative Guide & Reference will result in a "page cannot be found" error message since the tutorial uses a relative addressing system. However, the link reference contains the Reference Guide's page number, which can be searched within the customer Millennium server's own version of the Reference Guide.

Please contact us if you have [questions](#), [comments](#) or [problems](#).

[close window](#)

INTRODUCTION

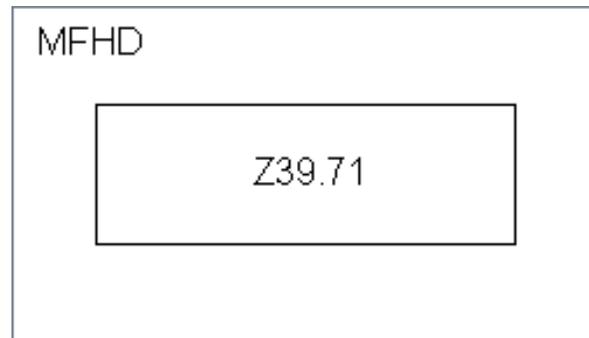
Navigation & Requirements

Innovative Holdings Records conform to the two interlocking standards that make up holdings -- the "communication" standard and the "display" standard:

The "communication" standard, is *MARC 21 Format for Holdings Data* (MFHD) - 2000 base text and Updates -which transmits the holdings data and is designed to be a carrier for holdings information

The "display" standard, primarily for libraries using MARC 21, is *ANSI/NISO Z39.71-2006*, which determines the conceptual data elements and how they display to staff and patrons.

The relationship between the two standards can be thought of as a "box within a box":



Another way to think of the relationship is using the analogy of Bibliographic records. Currently AACR2 is cataloging rules for MARC 21 Bibliographic records. In the same way, Z39.71 is the cataloging rules for the MARC 21 Format for Holdings.

References, definitions, and additional documentation for serials

MFHD - stands for the **MARC 21 Format for Holdings Data**. This is a MARC 21 standard. Information about MFHD can be found at [LC MARC21 Concise Format for Holdings Data](#)

ANSI/NISO Z39.71 - NISO Z39.71 standards can be found at [Holdings Statements for Bibliographic Items](#)

ANSI - stands for American National Standards Institute and is responsible for many and varied standards

NISO - stands for National Information Standards Organization

OCLC documentation on the implementation of Local Holdings (which replaces Union Listing) can be found at [Local Holdings Maintenance Documentation](#)

CONSER - The Cooperative Online Serials (CONSER) Program, a component of the Program for Cooperative Cataloging (PCC), sponsored by the Library of Congress. CONSER originated in the 1980s to convert serial records to the MARC format and build the serial database in OCLC. CONSER Guidelines for Holdings Data can be found at [CONSER Guidelines for Input of Caption/Pattern and Holdings Data](#)

The Serials Cataloging Cooperative Training Program (SCCTP), coordinated by CONSER, provides standardized training materials and trained trainers in the field of continuing resources. SCCTP offers a training workshop on Serial Holdings, which is highly recommended. It focuses on serials but is also a good introduction to MARC holdings format in general. SCCTP workshops can be found at [SCCTP's home page](#)

[close window](#)

RECORD CREATION

Record Creation

In Serials Check-in mode, users may create new bibliographic records using templates, or by downloading MARC records from a remote database using Z39.50, or by importing MARC records from vendors like OCLC.

Once a bibliographic record has been selected, users may go to the Summary tab to Attach New Holdings to the Serial record. Holdings records consist of fixed and variable length fields, which can be completed by using a pre-defined template.

Users may want to define and populate at least a couple of serial codes before creating new serials holdings. For statistical purposes, scode1 has sometimes contained frequency codes like monthly, weekly, annual, etc. and scode2 could keep track of the renewal cycle with codes containing the months of the year. Either way these codes, along with scode3 and scode4, can be named and defined by the library according to a useful purpose.

Once the fixed and variable length fields have been entered, the user may now create a Checkin card using the Simple or Advanced mode.

[close window](#)

RECORD CREATION

Holdings Record

Before creating a new holdings record & card, ensure that you have set up your templates for holdings records with your desired defaults and prompts. ([Admin](#) | [Settings](#) | [Templates](#))

For additional information, refer to the *Innovative Guide and Reference*, Page # 105825: [Managing Templates for New Records](#).

To create a holdings record that is attached to an existing bibliographic record follow the steps below:



Attach a holdings record to an existing bibliographic record.

Please ensure that your browser allows popups from this site.

1. From the Summary tab change the **View** dropdown to **Holdings**, then select Attach New Holdings.
2. Select a record template, if prompted, and then complete the prompts from the template.
3. If you wish to change one of the fixed-field default values, double-click in the fixed field to bring up a list of valid options for that field. For variable-length fields, type the desired text in the prompt box.
4. Select **Next** or press <Enter> to skip a field and/or to proceed to the next prompt of the template.
5. If you have NOT selected **Create checkin card when creating holdings record, in Admin | Settings | New Records tab** in the **Options for New Holdings Records** section, you may now add/edit additional variable and fixed fields.
6. If you HAVE selected **Create checkin card when creating holdings record, in Admin | Settings | New Records tab** in the **Options for New Holdings Records** section, you will be prompted to create a checkin card. If you wish to edit a fixed length field or add or edit variable fields in the record you just created, you may do that after you have created the checkin card by selecting the Record tab.
7. Save the record.

For additional information, refer to the *Innovative Guide and Reference*, Page # 100492: [Creating Item, Order and Checkin Records](#)

[close window](#)

RECORD CREATION

Card Creation

From Serials Check-in mode, Millennium lets users create a checkin card in either Simple or Advanced modes. Simple mode allows users to check in cards with two levels of enumeration (volume and issue for example). Advanced mode allows users to create up to six levels of enumerations plus two alternate levels that conform to the full MARC 21 standard.

To create a card, select the Card tab and then **Create Card**. The Create Card dialog box will open. If you have just created a holdings record, the Create Card dialog box will open automatically if you have selected "Create checkin card when creating holdings record" as part of your Settings for New Records, Options for New Holdings Records at **Admin | Settings | New Records tab**.

Create Card

Status: C Current (dropdown) Items on card: 24 (text box)

Display mode: C Box Display (dropdown) Order record: No Order Selected (button)

Create item during check-in Suppress OPAC display

Update Holdings?: No (dropdown)

Issues | Supplements | Indexes

Cover Expected Dates

Frequency: m Monthly (dropdown)

	Issue	month	day	year
Cover date	1st			
Expected date	1st	12	07	2006

Enumeration

Volume: 1 (text box)

Issue: 1 (text box)

Issues per volume: 12 (text box)

Numbering continuity: r Restart (dropdown)

Claiming Binding

Days before claim: 45 (text box)

Unit of binding: 12 (text box)

Binding delay: 1 (text box)

Advanced (button)

OK (button) Cancel (button)

The default card creation mode is [Simple mode](#).

For additional information, refer to the *Innovative Guide and Reference*, Page #100495: [Creating checkin cards](#)

RECORD CREATION

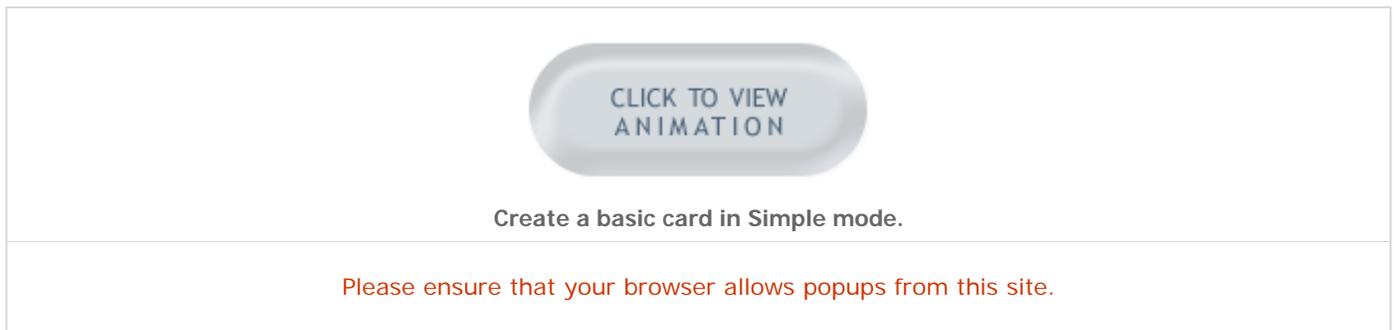
Simple Mode

WARNING: Do not press <Enter> as you are moving through the elements of the Card Creation dialog box. Always use <Tab> or click in each element. Pressing <Enter> will invoke the "OK" button at the bottom.

We will use Simple Mode to demonstrate creating a card for a monthly periodical that (although it publishes monthly) only publishes 10 times a year with combined issues in the summer (a "normalized irregular").

To see another example of normalized irregular (a daily newspaper that publishes five times a week) see the *Innovative Guide and Reference*, Page #104074: [Extrapolating EXPECTED Dates](#)

A discussion of the specific elements of the Card Create dialog box and what changes are made for this example follows the demonstration. To create our basic card:



OVERVIEW OF CHECKIN CARD FIELDS:

For additional information, refer to the *Innovative Guide and Reference*, Page # 100489: [Overview of Checkin Card Fields](#)

Upper section elements:

1. We use the default "Status" of Current, and the "Display mode" at Box display {link the words "Display mode" to Record Creation, Card Style, section 2.3}
2. We leave the "Create item during checkin" unchecked. If you want to always create an item for each received issue on a card, you would check this box.
3. The default "Update holdings" is set individually for each system. It may be "Yes", "No", or "Yes with dialog", or it may not appear at all if this has not been enabled for your system. We change this from "No" to "Yes" so that the MARC holdings statement will be created when we check our first issue in.
4. The default "Items on card" (number of boxes) is 24. We start with 12 for this card. (You may change this to any number of boxes up to the maximum of 84. For example, for annuals or less-frequent publications, change the number of boxes to 6. For daily newspapers, change the number of boxes to 80.)
5. The default "Order record" is the first order record attached to the bib record if there is one. You can select another order record to associate with this card by clicking on the box. (This is the order record used to display the last payment made when claiming issues from this card.)
6. The default "Suppress OPAC display" is unchecked. Suppressing the card eliminates the "Latest received" link in the Web OPAC display so that the public cannot view the card.

Lower section elements: (Issue tab)

7. The default "Frequency" is monthly, which is what we use. You can use the drop-down menus to change the frequency. "The use of autumn instead of fall" option appears only with Quarterly frequencies.
8. Enter the cover date of the first issue to be received. If you are binding this title, enter the cover date of the first issue in a bindable unit. If you are creating a "pattern" for a regular-irregular title (like the one we are doing) start with the first issue of the "pattern" - in our case we are starting with the January issue even though we might not actually have the January issue on hand and may delete the January box later). [If the item does not use cover dates, select **Advanced** to edit the chronology pattern.]

9. The system will supply an expected date based on the cover date you entered. Change this date to reflect the date you expect to receive the issue. This date will be used to create expected dates for the rest of the boxes on the card.
10. Enter the enumeration or numbering of the first issue to be received. Our holdings for this title will begin with volume 25 no. 1.

WARNING: If the item does not use numbering, or uses any number of levels of enumeration other than two (2), select **Advanced** to edit the enumeration level.

11. "Issues per volume" tells the system where to start renumbering the next volume. We use 12 even though we will eventually change the card to 10. If we were to start with 10 we would have boxes January through October, and we need November and December for our pattern so it is somewhat easier to start with 12 and change it to 10 before we extrapolate our boxes.
12. Numbering continuity means whether numbering continues or restarts with each new volume. Our example uses "Restart."

restart = numbering starts over with each new volume (ie v. 1 no.12, v.2 no.1) i.e. Vogue
continue = numbering continues with each new volume (ie v.1 no.12. v.2 no.13) i.e. Irish historical studies
13. The "Days before claim" and "Unit of binding" in the Claiming/Binding section will automatically change when you select your frequency. Verify that they match your policies and change them accordingly. We leave the system-supplied default of 45 days.
14. The Unit of binding is how many issues are in the bound volume. (Use zero if not binding.) We bind all 10 issues per year into one volume.
15. The Binding delay is the number of issues that should remain on the shelf after the unit of binding is sent to the bindery. (Often this is 1, use zero if not binding.)

FIXING THE BASIC PATTERN:

Once the card has been created we must manipulate the boxes until our basic "pattern" for our "normalized irregular" is correct. Then we can "extrapolate" our pattern for future years. The first step in this process is to delete the boxes we do not want and rename the combined issue boxes. For our example, we need to take the following steps:



Fix the basic pattern (delete boxes, update individual boxes).

Please ensure that your browser allows popups from this site.

1. Delete the July box and the September box (**Tools | Box Menu | Delete Boxes** or press the **Delete** key on your keyboard)
2. Change the cover title for the June box to say Jun/Jul (Double-click on the box)
3. Change the cover title for the August box to say Aug/Sep (Double-click on the box)

Next we must change the issue numbers in the last four boxes so that they are numbered sequentially 7-10 with the following steps:



Update boxes as a group.

Please ensure that your browser allows popups from this site.

4. Highlight all four boxes that have incorrect issue numbers
5. Click **Tools | Box Menu | Update Boxes as a Group**
6. Change the issue number from 8 to 7. A check will appear in the box on the left side signifying that this change will be applied (incrementally) to all the boxes highlighted.
7. Click OK

EXTRAPOLATING THE BOXES:

For additional information, refer to the *Innovative Guide and Reference*, Page #104074: [Extrapolating EXPECTED Boxes](#)

Now that the cover dates and issue numbers are all correct we are almost ready to extrapolate. We need to change our card parameters to 10 issues per volume instead of 12 so that the extrapolation process will know to start the renumbering after issue number 10. Then we are ready to extrapolate as many years as we like. We will add 3 more years of boxes to this card with the following steps:



Extrapolate the boxes.

Please ensure that your browser allows popups from this site.

1. Click **Tools | Card Menu | Edit Card**
2. Change the Issues per volume from **12** to **10** and choose OK.
3. Highlight all the boxes (Click and drag from the first box to the last, or Click on the first box and <Shift><Click> on the last box, or press <Alt><A>).
4. Choose **Tools | Box Menu | Extrapolate Boxes**
5. Change the "number of times" to extrapolate from 1 to **3**. This means extrapolate the entire pattern of boxes 3 more times for 30 more boxes. Then choose **OK**.

You can see that each of the 3 years that we added already has the June/July and August/September boxes combined and the issues numbered 1 through 10.

The card is now ready to save and use for check-in.

For additional information, refer to the *Innovative Guide and Reference*, Page # 100495: [Creating Checkin Cards](#)

RECORD CREATION

Advanced Mode

The Advanced mode of the Create Card dialog allows you to create checkin cards for serials that conform to the full MARC 21 standard with up to six levels of enumeration plus two alternate enumeration levels. In addition, you can specify different caption, mode, pieces per level, and numbering continuity for each enumeration level.

For additional information, refer to the *Innovative Guide and Reference*, Page #104072: [Editing Checkin Card Parameters](#)

Some examples of situations where you would use Advanced mode are:

1. If a serial title has fewer than two levels of enumeration (vol.) or more than two levels of enumeration (v., no., pt.)
2. If it has only a cover date and no enumeration
3. If you want the chronology captions to display (rarely used)
4. If you want to change the captions for the enumeration levels from "v." and/or "no." to another language.
5. If the enumeration is alphabetical or uses Roman numerals

CREATE CARD DIALOG BOX:

The elements of the top section of the Create Card dialog box are identical to those in Simple mode. Only the bottom sections differ:

Create Card

Status: C Current Items on card: 24

Display mode: C Box Display Order record: No Order Selected

Create item during check-in Suppress OPAC display

Update Holdings?: No

Issues Supplements Indexes

Cover Expected Dates

Frequency: m Monthly

Chronology Captions

Level	Caption	Display
Level1	year	<input type="checkbox"/>
Level2	month	<input type="checkbox"/>
Level3	day	<input type="checkbox"/>

Issue month day year

Cover date 1st

Expected date 1st 12-07-2006

Enumeration

Number of levels: 2

Caption	Display	Mode	Starting Number	Pieces per level	Numbering continuity
1 v.	<input checked="" type="checkbox"/>	n Numeric	1		
2 no.	<input checked="" type="checkbox"/>	n Numeric	1	12	r Restart

Claiming Binding

Days before claim: 45

Unit of binding: 12

Binding delay: 1

Alternate Enumeration

Number of levels: 0

Simple

OK Cancel

On the lower left side in the Cover/Expected dates section you have additional levels of **Chronology captions**. If you check the box the "caption" will show with the cover date in each box.

On the upper right side in the Enumeration section the **Number of levels** dropdown box allows you to choose from 0 to 6 levels. You can also change the enumeration "mode" from Numeric to Alpha or Roman. When setting up Roman numerals or alphabetical enumeration, the "starting numbers" are always entered as numbers - not Roman numerals or letters (e.g. "XXIV" would be entered as 14, the letter "A" would be entered as "1")

Note: For enumerations that contain more than one type of enumeration (e.g. v.2C) create two levels of enumeration -- one for the numeric and one for the alpha. You can uncheck the box for the second level "caption" to make it display as in the example.

Also on the right side at the bottom is the **Alternate Enumeration** section. Alternate enumerations are for titles that have a second alternate numbering scheme. Alternate enumeration can have one or two levels. An example would be *Hispania : revista española de historia* which could be numbered v.12 no.1 and also no.336

USING ROMAN NUMERALS:

Our first example demonstrates creating a card for a title that has two levels of enumeration, but cannot use Simple mode because the levels use Roman numerals. Our card will start with the February 2007 issue.



Title using Roman numerals for enumeration.

Please ensure that your browser allows popups from this site.

USING NO ENUMERATION:

Our second example will demonstrate creating a card for an annual that has no enumeration, only cover dates.



Title with no enumeration.

Please ensure that your browser allows popups from this site.

USING DIFFERENT LANGUAGE FOR CAPTIONS:

Our third example will demonstrate using only one level of enumeration (volume) with the caption in German.



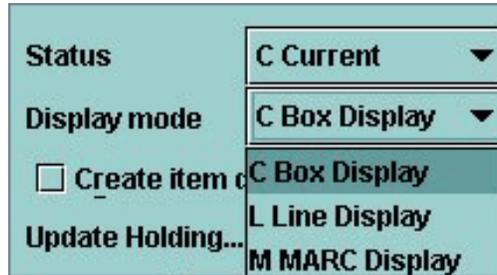
Title with one level of enumeration and caption in alternate language.

Please ensure that your browser allows popups from this site.

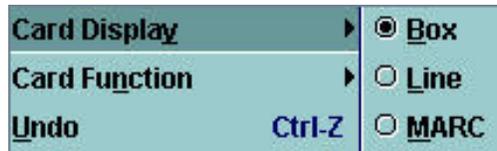
RECORD CREATION

Card Style

The *default* Card style or Card display mode can be set in the Card Creation dialog box when creating the card. This default display mode also governs the default display of the card in the Web OPAC. If the card has been created previously, the default display can be changed in the Card parameters from the Tools menu (**Tools | Card menu | Edit card**)



You can also change the display mode *temporarily* from the Tools menu at **Tools | Card Display**. This does not change the default display, which is set in the card parameters, but only changes the display for the time that you are accessing the record.



There are three options for the Card Display.

1. [Box Display](#)
2. [Line Display](#)
3. [MARC Display](#)

[close window](#)

RECORD CREATION

Box Display

The default is the box display. This display of most often used for periodicals.

Summary		Record c10069070		Card c10069070		Holdings c10069070		Routing c10069070(4)		0 Bib-Level Holds	
Check-in date		Fri Jan 19 2007		<input type="checkbox"/> Create item		Check In		Update Holdings?		No ▼	
Feb 2006 ARRIVED 03-06-2006 v.18 no.1		Apr 2006 ARRIVED 05-06-2006 v.18 no.2		Jun 2006 EXPECTED 12-11-2006 v.18 no.3		Sep 2006 LATE 10-06-2006 v.18 no.4		Nov 2006 EXPECTED 12-06-2006 v.18 no.5			
Feb 2007 EXPECTED 03-01-2007 v.19 no.1		Apr 2007 EXPECTED 05-01-2007 v.19 no.2		Jun 2007 EXPECTED 07-01-2007 v.19 no.3		Sep 2007 EXPECTED 10-01-2007 v.19 no.4		Nov 2007 EXPECTED 12-01-2007 v.19 no.5			
Feb 2008 EXPECTED 03-01-2008 v.20 no.1		Apr 2008 EXPECTED 05-01-2008 v.20 no.2		Jun 2008 EXPECTED 07-01-2008 v.20 no.3		Sep 2008 EXPECTED 10-01-2008 v.20 no.4		Nov 2008 EXPECTED 12-01-2008 v.20 no.5			

[close window](#)

RECORD CREATION

Line Display

Line display is often used for materials where you have a title or other information to record in the note area, like issues of monographic series

Summary	Record c10069070	Card c10069070	Holdings c10069070	Routing c10069070(4)	0 Bib-Level Holds
Check-in date <input type="text" value="Fri Jan 19 2007"/>		<input type="checkbox"/> Create item	<input type="button" value="Check In"/>	<input type="button" value="Update Holdings?"/>	<input type="text" value="No"/> ▼
ARRIVED on 03-06-2006 v.18 no.1 Feb 2006, 1 copy					
ARRIVED on 05-06-2006 v.18 no.2 Apr 2006, 1 copy					
EXPECTED on 12-11-2006 v.18 no.3 Jun 2006, 1 copy					
LATE on 10-06-2006 v.18 no.4 Sep 2006					
EXPECTED on 12-06-2006 v.18 no.5 Nov 2006					
Conference issue					
EXPECTED on 01-06-2007 * v.18 no.6 Dec 2006/Jan 2007					
EXPECTED on 03-01-2007 v.19 no.1 Feb 2007					
EXPECTED on 05-01-2007 v.19 no.2 Apr 2007					
EXPECTED on 07-01-2007 v.19 no.3 Jun 2007					
EXPECTED on 10-01-2007 v.19 no.4 Sep 2007					

[close window](#)

RECORD CREATION

MARC Display

MARC display (used less often) shows the issues checked in using the full MARC 21 tagged display.

Summary	Record c10069070	Card c10069070	Holdings c10069070	Routing c10069070(4)	0 Bib-Level Holds
Check-in date <input type="text" value="Fri Jan 19 2007"/> <input type="checkbox"/> Create item <input type="button" value="Check In"/> <input type="button" value="Update Holdings?"/> <input type="text" value="No"/> ▼					
85300 81 wb av. bno. i(year) j(month) u6 vr					
85400 81 wm av. bno. i(year) j(month) k(day)					
85500 81 av. wa					
863 81.1 a18 b1 j2006 j02					
863 81.2 a18 b2 j2006 j04					
863 81.3 a18 b3 j2006 j06					
863 81.4 a18 b4 j2006 j09					
863 81.5 a18 b5 j2006 j11					
863 81.6 a18 b6 j2006/2007 j12/01 zConference issue xSpecial conference issue					
863 81.7 a19 b1 j2007 j02					
863 81.8 a19 b2 j2007 j04					

[close window](#)

EDITING

Editing

Once you have created a record and/or card, you can change (edit) any of the elements. For example, in the holdings record, you can change fixed-length fields, edit variable-length fields, or add additional variable-length fields. You can change any of the parameters of the checkin card, and any of the elements of the individual issue boxes.

This section will demonstrate these editing procedures.

For additional information, refer to the *Innovative Guide and Reference*, Page #10541: [Editing Records in Millennium](#) and Page #100488: [Editing Checkin Cards](#).

[close window](#)

EDITING

Record

Summary	Record c10069070	Card c10069070	Holdings c10069070	Routing c10069070(4)	0 Bib-Level Holds
c10069070 Last Updated: 01-15-2007 Created: 12-06-2006 Revisions: 15					
Label Type	1 NO LABEL	Claim On	01-25-2007	Serial Code 3	a PURCHASE
Serial Code 1	b BIMONTHLY	Location	iuper IU Periodicals	Operator	- ---
Serial Code 2	g INDEFINITE	Recv Location	j UNIVERSITY PER	Update Count	i INCREMENT
Copies	1	Vendor	ebSCO Ebsco Subscriptions	Piece Count	7
MARC Leader #####ny 22#####3n 4500 Captions 852 niuper Captions 853 81 av. bno. i(year) j(month) Holdings 863 81.1 a1 b1-4 i1989 j03-11 Holdings 863 81.2 a2-7 b1-5 i1990-1995 j02-11 Holdings 863 81.3 a8-16 b1-6 i1996-2004/2005 j02-12/01 Holdings 863 81.4 a17- b1- i2006- j02-					

On the Record tab, you will see the standard presentation of a MARC 21 holdings record. The record is displayed in two sections, fixed-length fields at the top and variable-length fields below. The standard Millennium record editor is used to edit this record. For each fixed-length field, there is a label to the left and data to the right. You cannot edit the label. Contact the Help Desk if you wish to change a fixed-field label.

For additional information, refer to the *Innovative Guide and Reference*, Page #100686: [Modifying Fixed-length Fields](#).

Variable-length fields display below the fixed-length fields. Each variable length field is shown in one or more lines. The variable-length field can wrap into subsequent lines.

For additional information, refer to the *Innovative Guide and Reference*, Page #100689: [Modifying Variable-length Fields](#)

[close window](#)

EDITING

Cards

Summary	Record c10069070	Card c10069070	Holdings c10069070	Routing c10069070(4)	0 Bib-Level Holds
c10069070 Last Updated: 01-15-2007 Created: 12-06-2006 Revisions: 15					
Label Type	1 NO LABEL	Claim On	01-25-2007	Serial Code 3	a PURCHASE
Serial Code 1	b BIMONTHLY	Location	iuper IU Periodicals	Operator	- ---
Serial Code 2	g INDEFINITE	Recv Location	j UNIVERSITY PER	Update Count	i INCREMENT
Copies	1	Vendor	ebSCO Ebsco Subscriptions	Piece Count	7
MARC Leader #####ny 22#####3n 4500					
Captions	852		niuper		
Captions	853		81 av. bno. i(year) j(month)		
Holdings	863		81.1 a1 b1-4 i1989 j03-11		
Holdings	863		81.2 a2-7 b1-5 i1990-1995 j02-11		
Holdings	863		81.3 a8-16 b1-6 i1996-2004/2005 j02-12/01		
Holdings	863		81.4 a17- b1- i2006- j02-		

This section will discuss editing cards, deleting cards, and archiving cards.

There are many reasons why a user may want to edit an existing card. Some include:

- Changing data on the Checkin card fields
- Changing the number of enumeration levels
- Editing parameters for supplements and indexes
- Changing associated Order record
- Changing whether or not Item records can be created during check-in
- Changing the default display of the card in the OPAC

Card parameters can be edited from **Tools | Card menu | Edit card**. You can also open the Tools menu by right-clicking in the card.

This menu option (**Tools | Card menu | Edit card**) is available when the card is displaying on the screen and you have authorization to edit checkin records (authorization #144). If you do not have this authorization, you will see the menu option to **View card** (instead of **Edit card**).

Editing the card allows you to change any of the card parameters for issues, supplements and indexes. The Edit Card dialog box is almost identical to the Card Creation dialog box except for the beginning cover/expected dates and beginning enumeration boxes that are present in the Card Creation dialog box. All elements of the card that appear in the Edit Card dialog box are changeable.

Note: Changing to or from Semi-Monthly requires a new card

The Edit Card dialog box opens in Simple mode if you created your card in Simple mode, or in Advanced mode if you created your card in Advanced mode. You can change from simple to advanced at any time, but changing from advanced to simple will cancel any of the advanced options you had previously chosen. To edit a card to change the binding parameters, because this title is no longer bound, use the following steps:



Edit the binding parameters of the card.

Please ensure that your browser allows popups from this site.

For additional information, refer to the *Innovative Guide and Reference*, Page #104070: [Deleting the Checkin Card](#)

There may be many reasons to delete a card. A common one is that you have created a card and discover that there is too much wrong with it to correct it, and the simplest thing would be to start over again. Select **Tools | Card menu | Delete card**, which will delete the card. You can then create a new card by choosing the Create Card box that appears below the Card tab. To delete a card, use the following steps:



Delete an existing card and create a new one.

Please ensure that your browser allows popups from this site.

For additional information, refer to the *Innovative Guide and Reference*, Page #104068: [Archiving Checkin Cards](#)

This menu option gives you the ability to create a completely new card using the parameters of your existing record and card. When archiving a card, you will create a new holdings record that will hold your archived (old) card. Your original holdings record will contain your new card. Archiving is often used when a card is full and you want a quick way to create a new card. Select **Tools | Card menu | Archive card**. To archive a card, use the following steps:



Archive a card.

Please ensure that your browser allows popups from this site.

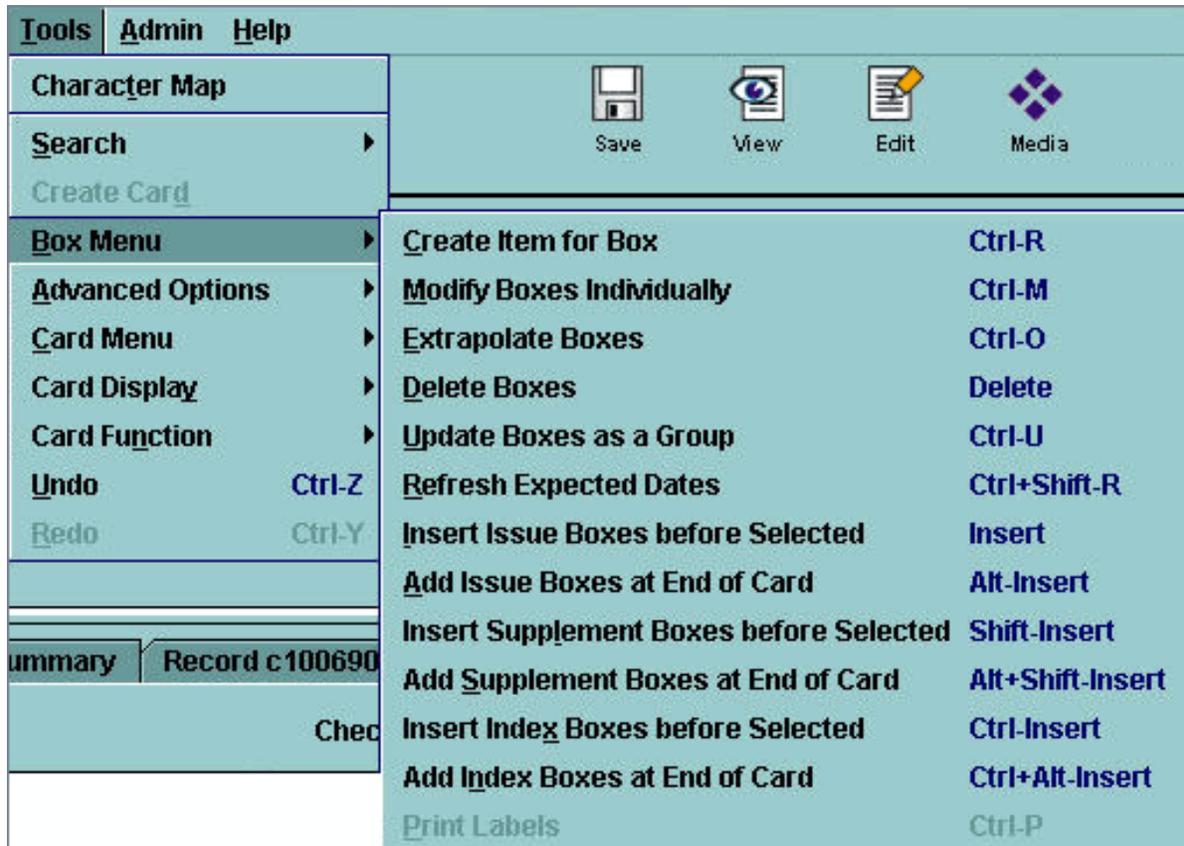
For additional information, refer to the *Innovative Guide and Reference*, Page #104072: [Editing Checkin Card Parameters](#)

[close window](#)

EDITING

Boxes

From **Tools | Box** menu you can see the many different options for manipulating boxes on a card. In our examples we will use the Tools menu from the menu bar. However, all the menu options also have keyboard shortcuts, which are listed to the right of the menu option:



For additional information, refer to the *Innovative Guide and Reference*, Page # 100466: [Selecting Boxes in a Checkin Card](#)

[close window](#)

EDITING

Create Item for Box

This will create an item record for any box with the status of ARRIVED. The item record is then "associated" with the box and will display in the Modify Box window when you edit the parameters of a box. It is useful for creating item records after the issues have already been checked in. The enumeration from the box is automatically copied into the volume field in the item record. Highlight the box or boxes and choose **Tools | Box menu | Create item for box**. We will create an item record for an arrived box:



Create an item for an arrived issue.

Please ensure that your browser allows popups from this site.

[close window](#)

EDITING

Modify Boxes Individually

You can change any element of a single box or multiple boxes individually. For example, if you have accidentally checked in an issue that you didn't intend to, you can change the status back to "Expected", the Expected date back to the original expected date, and the number of copies received back to 0 - thus returning it to its "unchecked-in" state. You can double-click on the box if only modifying one box. We will change an arrived issue back to "expected":



Fix an accidentally-checked-in box.

Please ensure that your browser allows popups from this site.

You can make different changes to multiple boxes, for example, adding a different note field to each box. Highlight the boxes and choose **Tools | Box menu | Modify boxes individually**. We will add different staff notes to two boxes.



Modify more than one box individually.

Please ensure that your browser allows popups from this site.

[close window](#)

EDITING

Update Boxes as a Group

This option allows you to perform the *same change* on multiple boxes all at once. This can include *incremental* cover dates, expected dates or enumeration or *identical* notes, URLs, etc. You can change Enumeration and Cover date to allow for pattern changes mid-year.

NOTE: Changing to or from semi-monthly requires a new record and card.

If you modify the Expected date, the "Increment transaction dates" will automatically be checked which will change your Expected dates in the selected boxes to evenly spaced intervals. If you uncheck the "Increment transaction dates" box, the Expected dates for the highlighted issues will have the *same date*, meaning that they are all expected to arrive on same date. Highlight the boxes you want to modify and choose **Tools | Box menu | Update boxes as a group**. We will change the expected dates for two boxes so that they are identical (not incremented):



Make the same change to multiple boxes.

Please ensure that your browser allows popups from this site.

[close window](#)

EDITING

Extrapolate Boxes

The Extrapolate Boxes option allows you to insert boxes with the same frequency or pattern as a set of previously created boxes. This function is especially useful for "normalized irregulars" where simply inserting additional issue boxes would require modification to match the irregular publication pattern. Extrapolating the already-modified pattern eliminates the additional modification.

Examples of "normalized irregulars" can include a monthly magazine that is published only 11 times a year (e.g. American Libraries) or a daily newspaper that is published 5 times a week (but not Saturday and Sunday). (E.g. Wall Street Journal or USA Today)

NOTE: Millennium extrapolates only the enumeration and chronology; notes are not carried over to the new issues.

Extrapolation is covered in the [Simple Card Creation](#) section of this tutorial.

[close window](#)

EDITING

Delete Boxes

To delete boxes individually or as a group, highlight the box(es) you want to delete. Choose **Tools | Box menu | Delete boxes** or press the **Delete** key on your keyboard. We will delete a year's worth of boxes from our card:



Delete multiple boxes from a card.

Please ensure that your browser allows popups from this site.

[close window](#)

EDITING

Refresh Expected Dates

This option helps the claiming system work properly by using the ARRIVED date of the most recently received issue to adjust the EXPECTED dates of future issues.

Despite your best efforts, you may discover that your actual arrival dates are getting later and later than you had predicted. When this happens and you would like to change the expected dates of the remaining issues, highlight the box for the *latest ARRIVED issue* **plus** any remaining expected issues (*not* supplements or indexes).

Choose **Tools | Box menu | Refresh expected dates**. Our example has expected dates for the first of the month, when it really has been and will continue to arrive toward the end of the month. We will change the remaining boxes. You can see that the expected dates are changed from the 1st of the month to the 24th of the month:



Refresh expected dates on remaining issues.

Please ensure that your browser allows popups from this site.

[close window](#)

EDITING

Insert Issue Boxes

You can insert more issue boxes *before* a highlighted box or add more issue boxes to the end of the card. For example, to add a box for a special issue of a periodical, you would insert one box. To add more expected issues to a card when you are nearing the end of the boxes on the card, you would add boxes to the end of the card. Choose **Tools | Box menu | Insert issue boxes ...** We will add a special issue box before our highlighted box:



Insert a special issue into a card.

Please ensure that your browser allows popups from this site.

[close window](#)

EDITING

Insert Supplement Boxes or Index Boxes

This menu option will be disabled (grayed out) if you have not chosen the **Add supplements and indexes** option in the Setup tab of the Login Manager, Manager-Controlled options for your login.

Using this menu option conforms to the MARC 21 Format for Holdings Data standard which allows separate patterns on one checkin card for issues, supplements, and indexes. If you set up separate patterns then an 'S' or an 'I' is added in the corner of a box to distinguish supplements and indexes from issues. You also have an option to specify the "OPAC label" for these boxes when you define the Captions & Patterns or from the Supplements or Index tab of the Card in **Tools | Card menu | Edit card**. This OPAC label does not show in the staff view of the box.

Your library may choose not to use separate patterns for issues, supplements, and indexes. In this case, all pieces of a serial are treated as issues.

NOTE: You must set up the supplement/index caption & pattern before you can insert boxes for supplements & indexes. You will be prompted to do this when you insert your first supplement or index box.

Choose **Tools | Box menu | Insert index boxes ...** We will add an annual index to our card between the December 2007 and January 2008 issues:



Insert an index box at the end of a year.

Please ensure that your browser allows popups from this site.

[close window](#)

EDITING

Print Labels

In addition to printing labels during checkin, you can also print spine, pocket or routing labels for any box regardless of its status. This option is disabled (grayed out) if you have not selected "Allow label printing" in the Printing tab of your Login Manager, Manager-controlled options for your login. Also the Label Type fixed field in your Holdings record (Record tab) must NOT have a value of "n" (no label). Highlight the box(es) and choose **Tools | Box menu | Print labels**. We will print labels for two issues that we have already checked in:



Print labels for already-arrived issues.

Please ensure that your browser allows popups from this site.

[close window](#)

HOLDINGS

Holdings

For a review of the Holdings tab display see: [Holdings tab](#) section.

In this section of the tutorial you will learn how Millennium Serials stores holdings data plus how to use the Holdings tab to:

1. Create a caption and pattern field (853)
2. Create a holdings field (863)
3. Use advanced mode
4. Convert existing holdings
5. Edit an existing pattern
6. Add a new pattern

The Holdings tab helps you easily create MARC holdings fields without having to know the MARC coding. The MARC structure is hidden unless you choose Advanced mode.

For additional information, refer to the *Innovative Guide and Reference*, Page # 100487: [Editing Holdings Fields](#)

[close window](#)

HOLDINGS

Create a Caption & Pattern Field

Before you can create holdings fields, you have to define the caption and pattern field for the serial. The caption and pattern field identifies the enumeration and chronology levels and the publication pattern of the serial. Millennium Serials prompts you to create a caption and pattern field the first time you add a holdings range to a record. To create your first captions & pattern field, follow these steps:



Create a captions and pattern for your holdings statement.

Please ensure that your browser allows popups from this site.

[close window](#)

HOLDINGS

Create a Holdings Field

After you have created your caption and pattern field, you can begin creating the holdings statement. Choose **Add New Range** to add additional ranges:



Create a holdings field using the holdings editor.

Please ensure that your browser allows popups from this site.

The OPAC View area shows exactly how the holdings statement appears in the Web OPAC. Any public notes you created also display in the OPAC View area. To add a public note that corresponds to any selected range, type the note in the Note box on the left side. The note will appear at the end of the range as shown in the OPAC view box and is viewable by patrons. Non-public notes are viewable by staff only.



Add a public note to an existing holdings statement.

Please ensure that your browser allows popups from this site.

If you want to edit the holdings statement, you simply click on the range in the OPAC View area; alter the text boxes in the Holdings editor (lower section); and then choose **Apply Changes** to complete your edits.

[close window](#)

HOLDINGS

Use Advanced Mode

Millennium Serials also offers the ability to create and edit the MARC holdings fields directly. You can create and edit caption and pattern fields - MARC 853-855 fields - and holdings range fields - MARC 863-865 fields. You will need to know MARC format to use advanced mode.

In the advanced Holdings editor, the upper area of the dialog displays each caption and pattern field with a folder icon and each holdings range field with a paper icon. The magnifying glass icon lets you collapse and expand the fields.

The Selected Range area (lower section) of the dialog displays the MARC data for whichever field is selected in the upper area.

To create a caption and pattern field in advanced mode, you simply choose **Add Pattern**, then enter the MARC data in the Selected Range area, and choose **Apply Changes**. Note that a Checkin record can have multiple caption and pattern fields.

To create a pattern with 2 levels of chronology (year and month) follow the steps below:



Create a captions and pattern field in advanced mode.

Please ensure that your browser allows popups from this site.

To create a new holdings range, you have to highlight the caption and pattern field that should apply to the new range. If there is only one caption and pattern field, it should appear highlighted. To do this, you select an 853 field in the upper area of the dialog. Then choose **Add Range** to add the new holdings statement (863 field)



Create a holdings field in advanced mode.

Please ensure that your browser allows popups from this site.

To edit any of the existing fields, click on the field in the Selected Range area, edit it, and choose **Apply Changes**. 853 and 863 fields can also be created or edited manually on the Record tab in the Holdings record directly if you are familiar with the MARC format.

[close window](#)

HOLDINGS

Convert Existing Holdings

What do you do with your existing holdings statements that might be in 866 fields or non-MARC LIB HAS fields? You can leave them as they are, or you can convert them to MARC format. There is way to do this in batch, however. You will have to convert these fields one by one if you want full MARC holdings.

Millennium Serials displays your existing holdings as regular variable-length fields in the Holdings tab in the OPAC view and the Selected Range area. You can have a combination of MARC holdings fields (853/863) and Textual holdings fields (866). The textual fields will always display first in the Web OPAC.

To convert your existing holdings, you have to define a caption and pattern field for the serial, add new ranges to replace the existing holdings, and then delete the existing holdings field.

The example below shows how you might use the Holdings editor to re-create the holdings range of this record, "converting" it to MARC and then deleting the original 866 field. It also shows a "textual" 866 field that will remain in the record.



Create an existing textual holdings field to a MARC holdings statement.

Please ensure that your browser allows popups from this site.

[close window](#)

HOLDINGS

Edit an Existing Pattern

You can edit a pattern that you have already created. The newly-edited pattern will be reflected in the 853 field in the holdings record (Record tab), but will not change any existing 863 (holdings) fields. If you have multiple patterns, you must first highlight a holdings statement in the OPAC view display that corresponds to that pattern. Then choose **Tools | Pattern Menu | Edit Pattern**. The example below shows editing the existing pattern, and the change that it makes in the 853 field:



Edit an existing captions and pattern field.

Please ensure that your browser allows popups from this site.

[close window](#)

HOLDINGS

Add a New Pattern

You can add additional patterns. Often a periodical will change its enumeration or chronology, requiring a new pattern. You can have more than one 853 field (caption & pattern) in a holdings record. Once you have create a second pattern field, each time you choose **Add New Range** (to add a new holdings field) you will be prompted to choose a pattern field (853) to which to associate the new holdings (863) field.

Each 853 field you create will be numbered sequentially in subfield 8 (See: [MARC21 Concise Format for Holdings Data](#)).

Our example below shows the first pattern has "1" in subfield 8. Each holdings field (863) associated with that pattern has a sequential subfield 8, starting with 1.1, then 1.2, etc. The new 853 field will have "2" in subfield 8. Then each holdings field (863) associated with the new pattern will have a sequential subfield 8, starting with 2.1.

To add a new pattern, choose **Tools | Pattern Menu | Add a Pattern**. The example below show adding a new pattern field, then adding a new holdings field and choosing the appropriate "pattern" for that field:



Add a second captions and pattern field and corresponding holdings statement.

Please ensure that your browser allows popups from this site.

[close window](#)

CHECK-IN FUNCTIONS

Check-in Functions

The most common functions (although there are others) done by libraries during the check-in process include:

1. Checking in
2. Creating items for issues
3. Printing serial labels
4. Routing serials
5. Updating MARC holdings

This section of the tutorial will discuss each of these processes.

For additional information, refer to the *Innovative Guide and Reference*, Page #100432: [Checking in Serials](#)

[close window](#)

CHECK-IN FUNCTIONS

Checking in

When you access a checkin card, the "next expected" box is highlighted. You may check in the highlighted issue by clicking **Check in**. However, there is a shortcut in Millennium serials that allows you to check in by simply typing the letter "c". If you check in a single issue, you do not need to save the record, but can simply close it by typing "q" (or by clicking the Close icon on the toolbar). If you check in multiple issues, you must save before closing the record, but checking in a single issue does not require saving. The example below shows checking in three late issues:



Check in multiple items.

Please ensure that your browser allows popups from this site.

[close window](#)

CHECK-IN FUNCTIONS

Creating Items for Issues

Many libraries choose to create an item record for each issue that is checked in. This process can be speeded-up by setting the card parameters to create item records automatically upon checkin. From **Tools | Card Menu | Edit Card** if the **Create item during checkin** box is checked in the card parameters, an item record will be created for each issue during the checkin process. Creating an item record template with the default settings (location, status, price, etc.) that you want and only prompting for barcode will speed the process of item creation. The enumeration from the box is automatically copied into the volume field in the item record, also saving you time.

The example below shows changing the card parameters to automatically create an item during checkin, checking in the issue, and creating the item record:



Create an item record during check in.

Please ensure that your browser allows popups from this site.

Items associated with a particular issue (box) will appear at the top of the "Modify Boxes Individually" window when you double-click on the box as shown below:

Modify Boxes Individually
✕

Status A ARRIVED ▾

Item Records

i1361085

Cover Expected Dates

	Month/ Season	Day	Year
Cover date	Nov		2006
Expected date	02-01-2007		

Enumeration

Levels	v.	<input type="text" value="18"/>
	no.	<input type="text" value="5"/>

Claims written

Total copies received

URL

Public Note

Staff Note

Suppress From Public Display

For additional information, refer to the *Innovative Guide and Reference*, Page #101006: [Creating Item Records during Check-in](#)

[close window](#)

CHECK-IN FUNCTIONS

Printing Serial Labels

Millennium Serials can be set to print spine and/or pocket labels automatically as part of the check-in process. You can have 9 different combinations of label formats, which are set up in your Serials Options in Set System Options.

For additional information, refer to the *Innovative Guide and Reference*, Page #101983: [Serials options](#)

If you want to print spine labels but not pocket labels or pocket labels but not spine labels, leave the "fields to print" blank for the label type that you do not want to print. E.g. Don't specify any pocket label fields to print if not printing pocket labels.

NOTE: If you are printing enumeration information on your labels, note that only two levels will print if you use the options: volume, prefixed with "v", and issue, prefixed with "no". If you use the option, volume:issue, more than two levels will print on the label.

To print labels, your Label Type fixed field in the Holdings record must have a value *other than* "n" (No Label).

Summary		Record c10069070	Card c10069070	Holdings c10069070	Routing c10069070(0)	0 Bib-Level Holds
c10069070		Last Updated: 02-01-2007		Created: 12-06-2006		Revisions: 28
Label Type	n NO LABEL	Claim On	02-20-2007	Serial Code 3	a PURCHASE	▲
Serial Code 1	n NO LABEL	Location	iuper IU Periodicals	Operator	- ---	
Serial Code 2	a SP 1 LBL 1	Recv Location	j UNIVERSITY PER	Update Count	i INCREMENT	
Copies	b SP 2 LBL 1	Vendor	ebsco Ebsco Subscriptions Services	Piece Count	14	
	c SP 3 LBL 1					
MARC Leader	d SP 1 LBL 2	###3n 4500				
	e SP 2 LBL 2					
Captions	85f SP 3 LBL 2	no.ii(year)jj(month)				
Captions	85g SP 1 LBL 3	01-4jj1989j03-11				
Holdings	86h SP 2 LBL 3	01-4jj1989j03-11				
Holdings	86j	01-4jj1989j03-11				

In addition, your printing options set in **Admin | Login manager | Manager-controlled options | Printing tab**, must have the "Allow label printing" box checked. Once these options are set, the **Print labels** box is automatically checked in the checkin card display.

Summary		Record c10069070	Card c10069070	Holdings c10069070	Routing c10069070(0)	0 Bib-Level Holds
Check-in date	Thurs Feb 01 2007	<input checked="" type="checkbox"/> Print labels	<input type="checkbox"/> Create item	Check In	Update Holdings?	No ▼
Feb 2006	Apr 2006	Jun 2006	Sep 2006	Nov 2006		
ARRIVED 03-06-2006	ARRIVED 05-06-2006	ARRIVED 02-01-2007	ARRIVED 10-01-2006	ARRIVED 02-01-2007		
v.18 no.1 1	v.18 no.2 1	v.18 no.3 1	v.18 no.4 1	v.18 no.5 1		
Dec 2006/Jan 2007	Feb 2007	Apr 2007	Jun 2007	Sep 2007		
EXPECTED 01-06-2007 *	EXPECTED 03-01-2007	EXPECTED 05-01-2007	EXPECTED 07-01-2007	EXPECTED 10-01-2007		
Conference issue v.18 no.6	v.19 no.1	v.19 no.2	v.19 no.3	v.19 no.4		

Serial labels are printed to the label printer selected in **File | Select printer | Label printer**. Serial labels and routing labels are printed to the same printer.

For additional information, refer to the *Innovative Guide and Reference*, Page #100434: [Printing Serial Labels during Check-in](#)

[close window](#)

CHECK-IN FUNCTIONS

Routing Serials

Routing to a list of individuals can be done with patron records or routing records. Whichever type your library uses can be accessed via the routing tab on the holdings record. If you want to change from using routing records to patron records, refer to the *Innovative Guide and Reference*, Page #103155: [Convert Routing File to Use PATRON Record Numbers](#)

Routing labels can also be printed automatically upon checkin if you have opted to have the serial routed to at least one person. This can be done from the routing tab. Once you have added at least one person to the list, the **Print routing** box will automatically be checked in the checkin card display. If you are printing both serial labels and routing labels, they are combined into one check box.

The example below shows the process of adding a patron record to the routing list via the Routing tab, thus enabling the "print labels/routing" option in the checkin card display:



Add a person to the title's routing list.

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For additional information, refer to the *Innovative Guide and Reference*, Page #100435: [Routing serials](#)

[close window](#)

CHECK-IN FUNCTIONS

Updating MARC Holdings

This is an optional feature of Millennium Serials. Contact Innovative if you wish to have this feature enabled.

A *system default* will be set for your system - either Yes, No, or Yes with Dialog. This will be the default when you create a new card or view the parameters of an existing card. To change an individual card's default behavior, change the setting in the card parameters at **Tools | Card Menu | Edit Card**.

An **Update holdings?** box will appear in the upper right corner above the card in the Card tab. This will appear as whatever option you set as the default for the individual card. You can override the card's default setting and change to any of the other options at any time for an individual issue by changing this drop-down box before checking in an issue. After checkin the setting will revert to the default setting for that card.

If there is not a MARC holdings statement for the card yet, checking in the first issue will create a holdings statement. Each subsequent issue that is checked in will then be appended to the statement. The holdings statement cannot be left open-ended with this feature.

The example below shows changing the card's default to "Yes", checking in the first issue of a card and creating a new MARC holdings statement (853/863) as a result:



CLICK TO VIEW
ANIMATION

Set the card to update MARC holdings statement automatically.

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If you skip an issue, the Update holdings process will automatically create a new range with a gap break separator. When that skipped issue is subsequently checked in, the holdings statement will be merged into one range as shown in the example below:

NOTE: If a serial has levels of chronology and no enumeration and you check in issues in other than chronological order, you must merge the resulting holdings statements manually with the **Merge with previous** button.



CLICK TO VIEW
ANIMATION

Checking in items out of sequence.

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For additional information, refer to the *Innovative Guide and Reference*, Page #105177: [Updating Holdings During Serials Checkin](#)