

Processing Title Changes (LTS Procedure #40)

Scope: This document outlines the procedures that Library Technical Services serials receiving staff follow when notification is received for bibliographic changes to periodicals and serial publications.

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Unit: E-Resources and Serials Management

Date last reviewed: 08 Dec 2023

Date of next review: Dec. 2024

1. If a title change is suspected without having the book in hand, update the POL note for the old title (ex: *Possible title change after 2021 - give to Paul upon receipt.*)

■ Package

Title

Handbook advance.

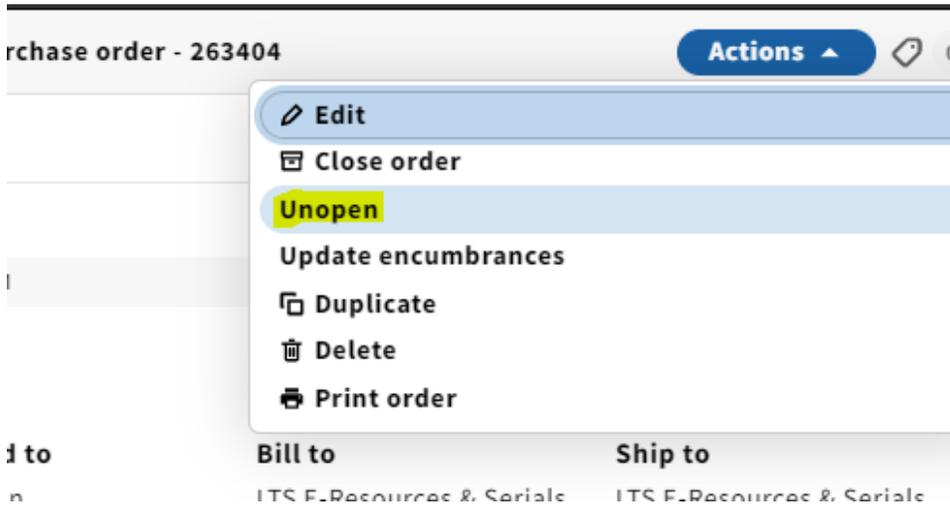
Receiving note

note HD9352 J62 --- Latest edition available in Nestle Library (Statler Hall). Please see a librarian for access
SEND TO BOOKMARKING & BARCODE.
EBSCO s.o. cancelled after 2021 - Ken B. will firm-order from 2022 onward each year.
Can still use this PO for payment.
Possible title change after 2021 - give to Paul upon receipt.

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2. If the title change is caught after the book has already been received, the Instance record will need to be updated. Either hand to Paul H. or put the title on the "Problem Serials" shelf in 110.
3. After the Instance record has been updated to reflect the new title, he will hand it back to Serials Acquisitions to update the PO to the new title. The following steps should be taken to do so:
 - a. In general, it's best to reattach the old PO to the new title. Navigate to the PO by searching the old title in the Receiving app or entering the PO number in the Receiving or Orders apps.
 - b. From the PO itself (not the POL), click *Actions Unopen*. This step is necessary to reattach the PO to the new title. If you do not have this permission, see the Serials Unit Supervisor.



- c. Click on the POL you wish to reattach. This will bring you to *PO line details*.
- d. Click *Actions* *Edit* from the third panel.
- e. Click *Title look-up*

Template name

▼

Item details

Record last updated: 9/20/2022 9:32 AM

Package

Title *

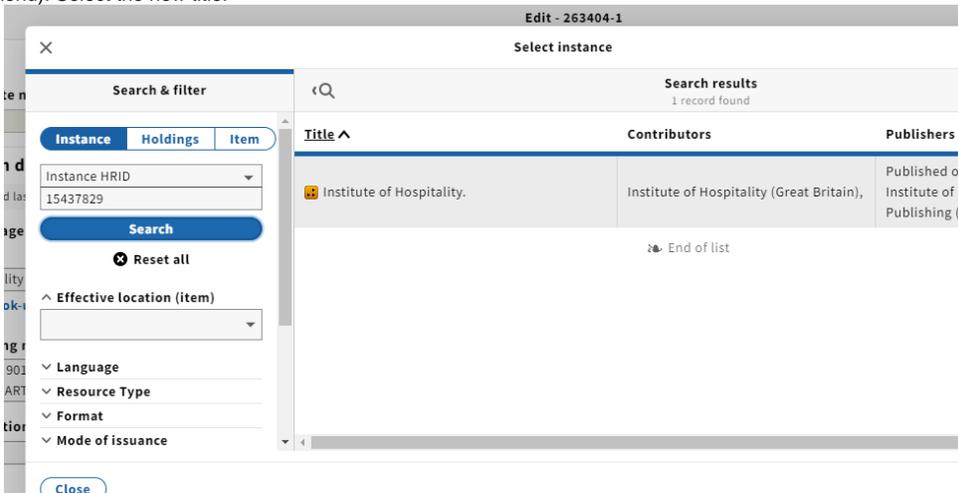
Hospitality quarterly.

Title look-up

Receiving note **Subscription**

hote TX 901 H 684 MM/DD/YYYY

- f. It's easiest to enter the HRID to find the new title's Instance record (make sure that *Instance HRID* is selected in the *Search & filter* drop-down menu). Select the new title.



- g. You will now see the new title populating the *Title* field. Add a brief note to the *Receiving note* field indicating that this underwent a title change (ex. *TC from Hospitality Quarterly with 2022*).

Package

Title *

Institute of Hospitality.

Title look-up

Receiving note

note TX 901 H 684 -- Non-circulating --
Current issues in Periodicals Area--|

TC from Hospitality Quarterly with 2022

Subscription from

MM/DD/YYYY

Publication date

Publisher

h. Scroll down and confirm that the location is correct. Click *Save & open order* in the bottom right corner.

^ Location

Select holdings* Quantity physical* Quantity electronic

Create new holdings for location

[Add location](#)

^ Physical resource details

Material supplier Receipt due Expected receipt date Create inventory*

Organization look-up

Material type

Please add volume

[Add volume](#)

[Cancel](#) [Save & close](#) [Save & open order](#)

i. Next, navigate to the old title's Instance record in Inventory, followed by holdings record.

j. Enter a staff only note in the Holdings notes field indicating that this underwent a title change (ex. *TC to Institute of Hospitality with 2022 (HRID 15437829)*). Change Receipt status to *Not currently received*.

^ Holdings notes

Note type* Note* Staff only

Note Staff only

[Add note](#)

^ Electronic access

Electronic access

[Add electronic access](#)

^ Acquisition

Acquisition method Order format Receipt status

^ Receiving history

[Add receiving history](#)

k. Click *Save & close*.

l. In the holdings record for the new title, enter similar notes as above (ex. *TC from Hospitality quarterly with 2022 (HRID 10019068)*). Enter *Currently received* in the Receipt status field.

^ Holdings notes

Note type *

Note

Note *

TTC from Hospitality quarterly with 2022 (HRID 10019068)

Staff only

Add note

^ Electronic access

Electronic access

Add electronic access

^ Acquisition

Acquisition method

Order format

Receipt status

Currently received

^ Receiving history

m. Click *Save & close*.