

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

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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.

Si

N

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.

urchase order - 263404 **Actions**

Edit

Close order

Unopen

Update encumbrances

Duplicate

Delete

Print order

Bill to ITS E-Resources & Serials **Ship to** ITS E-Resources & Serials

- 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**

- 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.

Edit - 263404-1

Select instance

Search & filter

Instance **Holdings** **Item**

Instance HRID

Search

Reset all

Effective location (item)

Language

Resource Type

Format

Mode of issuance

Search results
1 record found

Title	Contributors	Publishers
Institute of Hospitality.	Institute of Hospitality (Great Britain),	Published o Institute of Publishing (

End of list

Close

- 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 *

Hotel = TX901:H684

Quantity physical *

1

Quantity electronic

Create new holdings for location

Add location

^ Physical resource details

Material supplier

Receipt due

MM/DD/YYYY

Expected receipt date

MM/DD/YYYY

Create inventory *

Instance, holdings

Organization look-up

Material type

unspecified

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

Note *

CHECK-IN RECORD CREATED

Staff only

Note

TC to Institute of Hospitality with 2022 (HRID 15437829)

Add note

^ Electronic access

Electronic access

Add electronic access

^ Acquisition

Acquisition method

Order format

Receipt status

Not currently received

^ 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 *	Staff only
Note	TTC from Hospitality quarterly with 2022 (HRID 10019068)	
Add note		

^ Electronic access

Electronic access

[Add electronic access](#)

^ Acquisition

Acquisition method	Order format	Receipt status
		Currently received

^ Receiving history

m. Click *Save & close*.