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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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.*)

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.

Purchase order - 263404

Actions ▲

- ✏ Edit
- ▣ Close order
- **Unopen**
- Update encumbrances
- 🗐 Duplicate
- 🗑 Delete
- 🖨 Print order

Bill to: LTS E-Resources & Serials

Ship to: LTS 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

hote TX 901 H 684

Subscription

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.

Edit - 263404-1

Select instance

✕

Search & filter

Search results
1 record found

| Instance | Holdings | Item |

Instance HRID
15437829

Search

❌ Reset all

∧ Effective location (item)

∨ Language
∨ Resource Type
∨ Format
∨ Mode of issuance

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

hote 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**	
Hotel > TX901 .H684	1		🗑

Create new holdings for location

(Add location)

∧ **Physical resource details**

Material supplier	**Receipt due**	**Expected receipt date**	**Create inventory** *
	MM/DD/YYYY 📅	MM/DD/YYYY 📅	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** *	**Staff only**	
Note ▼	CHECK-IN RECORD CREATED	☑	🗑
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 *Current ly received* in the Receipt status field.

⌃ Holdings notes

Note type *	Note *	Staff only
Note ▾	TC 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.*