

Receiving Sample Periodical Issues (LTS Procedure #43)

Scope: This document outlines the procedure that Library Technical Services serials receiving staff follow when an issue is received in response to a sample request/order.

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Unit: Serials Management

Date last updated: 12/8/23

Date of next review: Dec. 2024

A. If a record exists in OCLC, import the record into FOLIO by taking the following steps:

1. From Inventory, click *Actions* *Import*
2. Enter the OCLC number you wish to import, then click *Import*

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Single record import

External target

OCLC WorldCat

Select the profile to be used

Inventory Single Record - Default Create Instance (Default)

Enter the OCLC WorldCat identifier

1411709958

Cancel

Import

3. Once the record has been uploaded, click *Actions* from the righthand panel *Edit Instance*
4. Click *Suppress from discovery* (catalogers will unsuppress once it's been cataloged)

^ Administrative data

Record last updated: 9/15/2022 12:08 PM

☒ Suppress from discovery

☐ Staff suppress

Instance HRID

15504688

Cataloged date

YYYY-MM-DD

Instance status term

Select instance status

Mode of issuance

serial

Add statistical code

- Click Add administrative note, enter the following information to indicate that this record is in a pre-cataloged state: **date:YYYYMMDD ttype:mpre userid:[enter your userid] ploc:Its**

Administrative note

date:20220915 ttype:mpre userid:jec449 ploc:Its

Add administrative note

^ Title data

- Click Save and close

B. Creating a Holdings Record

- Click Add holdings

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Instance • Tokyo daigaku keizai gakubu shiryoshitsunenpo = Annual bulletin ...
15504688 • Last updated: 9/15/2022

Actions

Warning: Instance is marked suppressed from discovery

Collapse all

Instance record (unspecified)

Tokyo daigaku keizai gakubu shiryoshitsunenpo = Annual bulletin of Resources and Historical Collections
Office Shiryo-shitsu, the Library of Economics, the University of Tokyo / Tokyo daigaku keizai gakubu
shiryoshitsu Hen.

Add holdings

^ Administrative data

Record last updated: 9/15/2022 12:16 PM

Suppressed from discovery

- Click Suppress from discovery

Holdings record

^ Administrative data

☒ Suppress from discovery

Holdings HRID

Source

FOLIO

Add former holdings ID

Holdings type

3. Under *Location Permanent**, select *LTS Review Shelves* from the drop-down menu (this indicates that it's being placed on the selector's shelf in 110 for review)

^ Location

Holdings location

Permanent *

LTS Review Shelves (cts,rev)

Location look-up

Shelving order

Holdings call number

4. In the Call number field, write DECISION PENDING

Location look-up

Shelving title

Call number prefix

Call number

Call number

5. Under *Holdings notes*, select *Note* as note type, write a brief description of what is being done with the sample issue (for example, if it's being placed on a specific selector's shelf), and check the *Staff only* box (indicating that patrons will not be able to see this note)

^ Holdings notes

Note type *

Note

Add note

Note *

Rec'd Mar. 2018 issue as a sample. Put on Ken Bolton's shelf for review. 9/15/22 jec449

Staff only



6. Click *Save and close*

C. Routing

Place issue received on the appropriate selector's review shelf in 110 Olin, along with the Decision Flyer filled out with the Instance HRID and print out of newly imported Instance record.