

Processing a ceased serial (LTS Procedure #169)

Scope: This document outlines the process that Library Technical Services serials staff follow when processing a serial that has been ceased. Note: In the case of a ceased serial, Paul Heckathorn (pjh25) (E-Resources & Serials Assistant) should be notified after taking the steps below. Jarrett Villines (jcv44) (Public Services Assistant) should be notified so he can bind what is unbound in the stacks.

Contact: [Joanna Cerro](#)

Unit: Serials Management

Date last updated: 2/17/2022

Date of next review: February 2023

1. In the Receiving app record of the ceased serial, delete all pieces populating the *Expected* field if we know we won't be receiving the issue(s). Click each individual piece and selecting *Delete*.

date	Receiving note	Order type
	olin PS 617 .J83 CEASED AFTER NO. 39 (2021)	Ongoing

2. Open the Instance record in the Inventory app by clicking on the title at the top of the Receiving record, which is a link. You'll want to open the link in a new tab so you can easily navigate back and forth between Receiving and Inventory.


Jubilat.

▼ Title information

^ POL details

POL number	Expected receipt date	Receiving note	Order type
126596-1	-	olin PS 617 .J83 CEASED AFTER NO. 39 (2021)	Ongoing
Vendor	Material supplier		
EBSCO	-		
Requester	Rush		
-	<input checked="" type="checkbox"/>		

3. Open the holdings record by clicking View holdings next to the appropriate location.

 Instance record (unspecified)

Jubilat.

▼ Holdings: Olin > PS617 .J83

View holdings

Add item

24

Add holdings

4. Select *Actions* and then *Edit* in the upper-righthand corner of the holdings screen.

 Holding • Jubilat. • Dept. of English, University of Mass • c2000
4679684 • Last updated: 6/19/2021

Actions

Instance: Jubilat.. Dept. of English, University of Mass, c2000

 Edit
 Duplicate
 Delete

er holdings ID

5. Make sure the holdings statement is accurate and shows the final completed volume before cancellation.

^ Holdings details

Number of items

Holdings statements

Holdings statement

1-39 (2000-2021)

Holdings statement

Add holdings statement

6. Scroll down to Holdings notes, click *Add note*, select *Note* for type and add the ceased publication statement. Be sure to check the staff only toggle since this note should be private.

^ Holdings notes

Note type

Note

Note

db=c CHECK-IN RECORD CREATED

Staff only

☒

Note

Ceased publication after no.39 (2021).

☒

Add note

7. Scroll down to Acquisition and update Receipt status to *Received and complete* or *ceased*

^ Acquisition

Acquisition method

Order format


Receipt status

Not currently received


Note: As of the Kiwi release, these fields are no longer available. They may be available again for the Lotus release in Spring 2022.

8. Click Save & close at the bottom of the screen when done.

9. Click the X in the upper-lefthand corner of the screen to exit the holdings record.



Holding • Jubilat. • Dept. of English, University of Mass • c2000
4679684 • Last updated: 6/19/2021

5197333  FOLIO -

Holdings type
Serial

Statistical code type Statistical code

10. Exit out of the Inventory app tab and go back to the Receiving app tab.

11. Navigate to the POL by right-clicking on the linked POL# and opening in a new tab.

Jubilat.

▼ Title information

^ POL details

POL number

Expected rece

126596-1

Open link in new tab

Open link in new window

Open link in incognito window

Save link as...

Copy link address

Inspect

Vend

EBSC

Requ


-

aterial supp

sh

^ Expected

12. Select *Actions* and then *Edit* in the upper-righthand corner of the POL detail screen.

← PO Line details - 126596-1 Jubilat. Actions 

^ Item details

▼ Record last updated: 2/3/2022 8:08 AM

Title
Jubilat.

Edit
Receive
Delete
Print

13. You'll want to indicate that the ongoing order has been ceased after a given year in the *Receiving note* field.

^ Item details

Record last updated: 2/3/2022 8:08 AM

■ Package

Title

Jubilat.

Receiving note

olin PS 617 .J83

CEASED AFTER NO. 39 (2021)

Sul

MM

Publication date

Pul

14. Scroll down to PO line details, and change both the *Receipt status* and *Payment status* (as long as the last invoice has been paid) to *Cancelled* from the drop-down menu.

^ PO line details

POL number

126596-1

Acquisition method

Purchase at vendor system

Order format

Physical resource

Created on

6/29/2021, 11:42 AM

Receipt date

MM/DD/YYYY



Receipt status

Cancelled

Payment status

Cancelled

Source

User

15. Click *Save & close*

16. If this is the only line item on the purchase order, you will want to close out the PO. *Note that only open orders can be closed.* Take the following steps to do so:

a. Click the arrow on the upper-lefthand corner of the POL details pane, which takes you to the PO itself

PO Line details - 259274-1

Actions

Collapse all

Item details

Record last updated: 6/16/2021 4:33 PM

Title

Mother Jones.

Receiving note	Subscription from	Subscription to	Subscription interval
olin AP2 M91 + ci:Per Rm CANCELLED AFTER 2021	-	-	-

Publication date	Publisher	Edition	Linked package
-	-	-	-

Contributors

b. Click *Actions* and *Close order*

Purchase order - 259274

Actions

Close order

Unopen

Update encumbrances

Duplicate

Delete

Purchase order

Record last updated: 6/16/2021 4:33 PM

PO number	Vendor	Approval date	Assigned to
259274	EBSCO	6/16/2021, 4:33 PM	Warfield, Debra Claire

Manual	Re-encumber	Bill to	Ship to
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LTS Acquisitions 110 Olin Library Cornell University Library Ithaca, NY 14853	LTS E-Resources & Serials 110 Olin Library Cornell University Library Ithaca, NY 14853

Created by: admin, admin

Created on: 12/3/2020, 1:40 PM

c. A pop-up box will appear where you can indicate why you are closing the PO. Select Ceased under the *Reason* dropdown menu and note when the publication was ceased.

Close - purchase order - 126596

Reason

Ceased

Notes

CEASED AFTER 2021

Cancel

Submit

d. To close the order, click *Submit*. A confirmation message appears and the order's status changes to *Closed*.