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.*
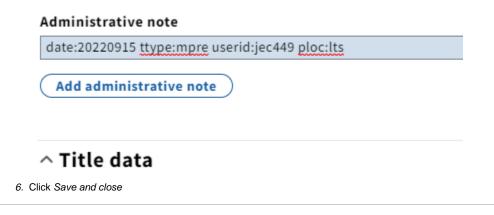
Contact: Joanna Cerro

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*

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)

5. 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:lts**

Administrative note

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

(Add administrative note)

∧ **Title data**

6. Click *Save and close*

B. Creating a Holdings Record

1. Click *Add holdings*

× ⚏ **Instance • Tokyo daigaku keizai gakubu shiryoshitsunenpo = Annual bulletin ...** (**Actions** ▾) ✎
15504688 • Last updated: 9/15/2022

Collapse all

⚠ Warning: Instance is marked suppressed from discovery

⚏ 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

2. Click *Suppress from discovery*

Holdings record

∧ **Administrative data**

☑ **Suppress from discovery**

Holdings HRID   Sourc

                                                             FOLI(

(**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

Select location

Location look-up

Shelving title

Call number prefix	Call number	Call nur
	DECISION PENDING	

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

(Add note)

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.