

Serials Subscription Tracking in NOTEbooks

There are two ways to track serials in the NOTEbooks Serials database.

- ❖ Each serial master holding record represents an individual subscription for a specific title and will have a single master holding document and an issue document for each of the issues belonging to that subscription.
- ❖ Alternatively, one master holding and one issue document can represent more than one subscription. Thus there will be a single entry for the subscription and its issues regardless of the number of copies or subscriptions received.

Depending upon the choice above, there will either be multiple master holding documents for an individual title for every subscription or copy of that title or a single master holding entry for multiple subscriptions.

The system default is multiple master holding documents each representing subscription 1 through the total number of subscriptions. The subscription number is indicated in the Sub.Copy # field.

- ❖ To change the default to record multiple copies in a single master holding document, go to the Serials configuration document and change the "Order Number Switch" field to "Order Number:".
- ❖ This will change the Sub. Copy # field to a field that will automatically populate with an order number. The order number will be derived from the Serials configuration document using the Number Counter field with the Serial Suffix added to the number. This field is editable and the automatic number can be substituted with any number that the library specifies.
- ❖ A "Copies" field on the master holding will allow entry of the number of copies to be received. This number will be inherited into subsequent issue documents that are created from this new master holding document.

On the issue forms generated from this master holding, there will be a Copies field and Copies Received field to keep track of the number of copies that are received. Partial receipts can be recorded on the issue form by simply indicating the number of copies received if less than the total subscribed to.

Routing lists can be printed for only those copies that have been received by the library.