

## How to identify and link serials

### Identification

Technical Services Committee guidelines state that serial records are preferred for the following items:

- Travel guides
- Directories
- Study guides
- Yearbooks
- Graphic novel series, with numbered parts only

For the above types of items, prefer a serial record for the series title rather than individual monographic records for each separately published issue.

This means that:

1. If an item has a **series** title, but no distinct **item** title- just a volume, issue, part or year - it should be linked to a serial record. For example, the following require serial records:
  - a. Sports Illustrated Almanac 2010
  - b. Master the SAT 2008 ed.
  - c. Inuyasha : A Feudal Fairy Tale, Vol. 1
2. If the item has a series title as well as a distinct item title, then it requires a separate monograph record. The following require monograph records:
  - a. Green Lantern : Rage of the Red Lanterns
  - b. Green Lantern : Tales of the Sinestro Corp

### *Travel Guides*

Travel guides often have titles for a publisher's whole guidebook series i.e. Lonely Planet, Frommer's, Rough Guide, Forbes Travel Guide etc. Within each of these series, there are subseries i.e. Forbes Travel Guide. Texas; Forbes Travel Guide. Great Plains.

The serial record should be for the combined series and subseries title. For example, the following require separate serial records:

1. Forbes Travel Guide. Texas
2. Forbes Travel Guide. Great Plains
- 3.

Annual editions of each are then linked to the appropriate record.

Reminder: If there is a major change to a series title, a new serial record is required.

Major changes include:

1. the addition, deletion, change or reordering of the first five words in a title, for example:  
From: Mobil Travel Guide. New England Eastern Canada  
To: Forbes Travel Guide. New England
2. any word in the title that indicates a change in subject matter, for example:  
From: Mobil Travel Guide. New England Eastern Canada  
To: Mobil Travel Guide. New England.

Examples of minor changes that do not require a new record:

Fodor's 2010 Bahamas v. Fodor's Bahamas  
Top 10 Florence and Tuscany v. Top Ten Florence and Tuscany

#### *Graphic Novels*

1. Graphic novel series, whose individual volumes are numbered only, should be cataloged as serials:
  - a. Pokémon Diamond and Pearl, vol. 1.
  - b. Pokémon Diamond and Pearl, vol. 2.
2. Graphic novel series, which include parts with unique titles, should be cataloged as monographs, with a separate record for each unique title and a series statement for the series title:
  - a. Green Lantern : Rage of the Red Lanterns
  - b. Green Lantern: Tales of the Sinestro Corp

#### *Multi-part Serials*

Multipart items, usually reference works, are sets issued on a regular basis. For example, Scott Standard Postage Stamp Catalogue is a 6-volume set issued annually. For clarity, the call number should include a combination of the year and the volume in a z subfield, in a format that conforms to your library's local practice. For example:

383.22 SCO |Z2005 ed. Vol. 1

Or

383.2 SCO |Z2005/V. 01

Or

769.56 SCO|Z2010 - VOL. 1

Again, the coding “|z” **must** be present in order for the call number to display in iBistro in a way that will allow patron holds on individual volumes.

### **Linking**

When you decide to link your item to a serial record, the call number you create **must** include a z subfield with the volume, issue, part or year of the item. This is true even if you are the only library to have the series and even if you only have one part of the serial.

**Important:** Subfield z must be present in order to allow patrons to place holds on individual volumes in a series.

### *Vendor records*

Vendors offer monograph records for all items, including those that require serial records. If separate monograph records have been loaded, but a serial record is required:  
Non-OCLC members:

1. Modify the call numbers of your items to indicate the volume, issue, part or year
2. Transfer all of your library's items to **one** of the monograph records. (If you have not done a transfer, let me know and I will do it.)  
NOTE: It doesn't matter if you transfer your items to the record for volume 1 or volume 3, since I'll be overlaying the record with a serial record. Just be sure your call numbers indicate the year, part, issue or volume number.
3. Notify me and I will bring in a serial record to overlay the existing monograph record.

OCLC members should:

1. Modify the call numbers to indicate the volume, issue, part or year
2. Bring in a serial record from OCLC
3. Transfer all of your library's items to the serial record
4. Notify me if there are other libraries attached to the monograph records

You are only allowed to edit or transfer items from your own library, so in all cases, if you are transferring your item from a monograph record that has other libraries linked, please let me know so I can transfer the other libraries' items.

If you know that your vendor file contains items that require a serial record, notify me after you have saved your files to the server. Let me know the titles and number of items involved and I will bring in a serial record right away. This will cut down on the amount of time that separate records remain in the system potentially gathering patron holds. (Transferring items after holds have been placed can be tricky.)

### *Preliminary Records*

If you are creating a preliminary serial record:

1. Create one record and link your item(s) to the record.
2. Create call number(s) with z subfield(s) indicating the volume, issue, part or year.
3. Add 'serial' to the 500 field, for example:  
500 juliusf serial