Learn how to add, receive, delete, and edit serial items. A serial is a publication issued in successive parts and continued indefinitely. A subscription is composed of parts called items. Example: periodicals.

Use Discover Items to search for the serial title and click the title link to view details.

**Add copies, Holdings View, and Copies View**

These links are in the upper right corner of the screen, below the Copies, Details, and Holds links.

### Add copy

1. On the Copies screen, in the upper right corner, click **Add Copy**.
2. On the Add New Copy screen, fill in the following fields:
   a. **Copy Number** - The number assigned by the library that distinguishes one copy of the title from another identical copy.
   b. **Branch** - Library branch that owns the item described by the item record.
   c. **Note(s)** - Note about the item. *(Optional)*. To make a note display upon check in or check out, type an exclamation point (!) as its first character.
   d. **Receipt Status** - Whether newly published parts of a multipart or serial item are being received.
   e. **Shelving Locations** - Location of the item within the branch. To remove a shelving location, either click the X next to the down arrow (if available), or click the shelving location in the list to uncheck it.
3. Click **Add Copy**. The screen displays with the information you entered.

**Unrecognized Shelving Location error**

This error occurs when the Shelf Location value (852 ‡c) in the Location Holdings Record does not match a value entered in the Holding Codes Translation Table found in OCLC Service Configuration. The Holding Code Translation Table is the source for Branch codes and display names, Shelving Scheme and Shelf Locations. For more information, see [Holding Codes Translation Table](https://help.oclc.org/Library_Management/WorldShare_Circulation/Item_management/View_and_use_serial_item_records).

### Holdings view and Copies view

On the Copies screen, in the upper right corner, click Holdings View or Copies View.

- **Holdings View** - Lists item-level holdings (items are the parts that make up the subscription). Each item has a barcode.
- **Copies View** - The Copies area lists basic information about the subscription (branch, call number). The Holdings for Selected Copy area lists brief information about the items in the subscription (enumeration and chronology, if relevant, and barcode).
Receive serial item

1. On the Copies screen, in the Copies section, find the subscription and click Receive Item.

2. On the Add New Serial Item screen, fill in the fields. One of these fields is required: Barcode, Enumeration and Chronology, or Description.

Some fields need explanation:

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category</td>
<td>A discrete bibliographic entity that constitutes either the whole or a part of the bibliographic item. A bibliographic unit may be a basic bibliographic unit, supplementary material, or Index. Examples of bibliographic units are: a single volume, a multi-volume monograph, an accompanying pamphlet, a set of serially-issued updates.</td>
</tr>
<tr>
<td>Chronology</td>
<td>The date(s) used by the publisher on a serially-issued bibliographic unit to help identify it or indicate when it was issued. The chronology may reflect the dates of coverage, publication, or printing. When entering months, type them as numbers (1, 2, etc.). Do not spell them out (January, Feb., etc.).</td>
</tr>
<tr>
<td>Copy Number</td>
<td>The number assigned by the library that distinguishes one copy of the title from another identical copy.</td>
</tr>
<tr>
<td>Description</td>
<td>The statement of coverage for the library's holdings of a serial or multi-part title, whether formatted (Vol. 7 No. 1 – Vol. 22 No. 12) or textual (Library holds 1992 – present).</td>
</tr>
<tr>
<td>Enumeration</td>
<td>The designation reflecting the alphabetic or numeric scheme used by the publisher on an item or assigned when the holdings statement is created to identify the individual bibliographic or physical parts and to show the relationship of each unit to the item as a whole.</td>
</tr>
<tr>
<td>Branch</td>
<td>Library branch that owns the item described by the item record.</td>
</tr>
</tbody>
</table>
| Note(s)   | (Optional). To make a note display upon check in or check out, type an exclamation point as its first
<table>
<thead>
<tr>
<th>FIELD</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receipt Status</td>
<td>Whether newly published parts of a multipart or serial item are being received.</td>
</tr>
<tr>
<td>Shelving Locations</td>
<td>Location of the item within the branch.</td>
</tr>
<tr>
<td>Use Restrictions</td>
<td>Any restrictions on the use of the item. It is used when it is necessary to include information that is too item specific to be handled by field 506 (Restrictions on Access Note) in the bibliographic record.</td>
</tr>
</tbody>
</table>

3. Click **Add Serial Item**: the screen displays with the information you entered. On the Copies screen, click **Refresh** to see the new item.

**Unrecognized Shelving Location error**
This error occurs when the Shelf Location value (852 ‡c) in the Location Holdings Record does not match a value entered in the Holding Codes Translation Table found in OCLC Service Configuration. The Holding Code Translation Table is the source for Branch codes and display names, Shelving Scheme and Shelf Locations. For more information, see Holding Codes Translation Table.

**Delete serial item**

1. To find the items in a serial set, on the Copies screen, click the row for the serial set containing the item you want to edit. Result: Closed
2. Under Holdings for Selected Copy, for the item you want to edit, click **View/Edit**.
3. On the Serial Item Details screen, in the upper right corner, click **Delete**.
4. On the Delete Serial Item window, click **Delete**.

After an item is deleted, its status in WMS is Withdrawn. Items deleted from WMS will not display to the public, but will stay in the system based on the time configured in OCLC Service Configuration (WMS Circulation > Admin/General > Deleted Items). For more information, see Deleted Items.

For more information on statuses, see Item statuses.

**Edit serial item**

1. To find the items in a serial set, on the Copies screen, click the row for the serial set containing the item you want...
to edit. The items in the serial set appear under Holdings for Selected Copy.

2. Under Holdings for Selected Copy, for the item you want to edit, click **View/Edit**.

3. On the Serial Item Details screen, click **Edit Serial Item**.

4. On the Edit Serial Item Details screen, edit the fields.

If editing an already received item's enumeration and chronology, a defect incorrectly updates the local holdings record. Instead, use OCLC **Connexion** to make the edit.

**Some fields need explanation:**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category</td>
<td>A discrete bibliographic entity that constitutes either the whole or a part of the bibliographic item. A bibliographic unit may be a basic bibliographic unit, supplementary material, or Index. Examples of bibliographic units are: a single volume, a multi-volume monograph, an accompanying pamphlet, a set of serially-issued updates.</td>
</tr>
<tr>
<td>Chronology</td>
<td>The date(s) used by the publisher on a serially-issued bibliographic unit to help identify it or indicate when it was issued. The chronology may reflect the dates of coverage, publication, or printing. When entering months, type them as numbers (1, 2, etc.). Do not spell them out (January, Feb., etc.).</td>
</tr>
<tr>
<td>Copy Number</td>
<td>The number assigned by the library that distinguishes one copy of the title from another identical copy.</td>
</tr>
<tr>
<td>Description</td>
<td>The statement of coverage for the library's holdings of a serial or multi-part title, whether formatted (Vol. 7 No. 1 – Vol. 22 No. 12) or textual (Library holds 1992 – present).</td>
</tr>
<tr>
<td>Enumeration</td>
<td>The designation reflecting the alphabetic or numeric scheme used by the publisher on an item or assigned when the holdings statement is created to identify the individual bibliographic or physical parts and to show the relationship of each unit to the item as a whole.</td>
</tr>
<tr>
<td>Branch</td>
<td>Library branch that owns the item described by the item record.</td>
</tr>
<tr>
<td>Note(s)</td>
<td>Note about the item.</td>
</tr>
</tbody>
</table>
FIELD

(Optional). To make a note display upon check in or check out, type an exclamation point as its first character (!).

Receipt Status

Whether newly published parts of a multipart or serial item are being received.

Shelving Locations

Location of the item within the branch.

To remove a shelving location, either click the X next to the down arrow (if available), or click the shelving location in the list to uncheck it.

Use Restrictions

Any restrictions on the use of the item. It is used when it is necessary to include information that is too item specific to be handled by field 506 (Restrictions on Access Note) in the bibliographic record.

5. Click Save Serial Item: the screen displays with the information you entered.

Unrecognized Shelving Location error

This error occurs when the Shelf Location value (852 ‡c) in the Location Holdings Record does not match a value entered in the Holding Codes Translation Table found in OCLC Service Configuration. The Holding Code Translation Table is the source for Branch codes and display names, Shelving Scheme and Shelf Locations. For more information, see Holding Codes Translation Table.

Edit copy

1. On the Copies screen, in the Copies section, in row for the serial set you want to edit, click View/Edit.
2. On the Copy Details screen, click Edit Copy.
3. On the Edit Copy Details screen, edit the fields (use OCLC Connexion to look up call numbers).

Some fields need explanation:

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy Number</td>
<td>The number assigned by the library that distinguishes one copy of the title from another identical copy.</td>
</tr>
<tr>
<td>Branch</td>
<td>Library branch that owns the item described by the item record.</td>
</tr>
</tbody>
</table>
### FIELD | DEFINITION
---|---
Note(s) | Note about the item. *(Optional)* To make a note display upon check in or check out, type an exclamation point as its first character (!).
Receipt Status | Whether newly published parts of a multipart or serial item are being received.
Shelving Locations | Location of the item within the branch. To remove a shelving location, either click the X next to the down arrow (if available), or click the **shelving location** in the list to uncheck it.

4. Click **Save Copy**: the screen displays with the information you entered.

**Unrecognized Shelving Location error**
This error occurs when the Shelf Location value (852 ‡c) in the Location Holdings Record does not match a value entered in the Holding Codes Translation Table found in **OCLC Service Configuration**. The Holding Code Translation Table is the source for Branch codes and display names, Shelving Scheme and Shelf Locations. For more information, see **Holding Codes Translation Table**.

**Report missing item**

1. To find the items in a serial set, on the Copies screen, click the row for the serial set containing the item you want to edit. The items in the serial set appear under Holdings for Selected Copy.
2. Under Holdings for Selected Copy, in the row for the item you want to report as missing, click **View/Edit**.
3. On Copy Details screen, in the upper right corner, click **Report Missing**.