Discover how to manage the bindery process for serial issues in WorldShare Acquisitions.

Add issues to a binding unit

Overview

A binding unit is a container for issues that are going to be sent to the bindery or bound.

Before you add issues to a binding unit, it is recommended that you create a shelving location for the bindery location (e.g., At Bindery) for any branches/holding locations where the issues belong.

You may also want to ensure the shelving location displays as Unavailable in WorldCat Discovery. If you include Bindery in the shelving location(s) you create, you can set the Location in the OPAC Status Grid to “Bindery” (asterisks must be included) to apply this setting to all shelving locations which contain Bindery.

You cannot add issues:

- To a binding unit that already belong to another binding unit. You must first remove the issues from their current binding unit before adding them to a new binding unit.
- From multiple branches or holding locations to a single binding unit because when a binding unit is sent to the bindery, the system assigns a temporary shelving location to the issues. The temporary shelving location of a holding must belong to the same holding location or branch as the issues in order to be assigned.

Add issues to a new binding unit

1. On the left navigation, click Discover Items.
2. Select My Library Holdings from the Scope drop-down list.
3. Select an index from the Index drop-down list.
4. In the Term(s) text field, enter your search terms. The text field will expand to fit your search terms, if needed.
5. Click Search and then click the title of the serial you want to bind. The Issues screen opens.
   
   Note: If the title is not registered with one of the serial-related material types, click the Issues link in the top-right of the screen.
6. Click the Issues to Bind tab. A list of issues that your library has received is displayed.

   Issues to Bind columns - Table

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barcode</td>
<td>The barcode assigned to the issue.</td>
</tr>
<tr>
<td>COLUMN</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>--------------------</td>
<td>-------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Binding Status</td>
<td>The binding status assigned to the issue (Not Bound, Pending, Send to Bindery, or Bound).</td>
</tr>
<tr>
<td>Binding Unit</td>
<td>The binding unit to which the issue is assigned. Click binding unit name to open the Edit Binding Unit dialog window.</td>
</tr>
<tr>
<td>Branch</td>
<td>The branch where the issue is located.</td>
</tr>
<tr>
<td>Call Number</td>
<td>The call number of the local holding record to which the issue belongs.</td>
</tr>
<tr>
<td>Chronology</td>
<td>Date or period of publication (year, quarter, season, month, week, day, etc.).</td>
</tr>
<tr>
<td>Date Received</td>
<td>The date the issue was received. To enable this column, click the Configure button (˅) and select the Date Received checkbox.</td>
</tr>
<tr>
<td>Enumeration</td>
<td>The numbering scheme used to organize the issues of a serial publication (volume, number, part, issue, etc.).</td>
</tr>
<tr>
<td>Shelving Location</td>
<td>The location of the issue within the branch.</td>
</tr>
<tr>
<td>Type</td>
<td>The type of issue (Basic, Index, or Supplement).</td>
</tr>
</tbody>
</table>

7. **(Optional)** Filter the issues to locate the ones that you want to add to a binding unit. You can filter by the following:
   - **Binding Status** – Select one of the following statuses from the drop-down list:
     - ALL (default)
     - Not Bound
     - Pending
     - Send to Bindery
     - Bound
   - **Local Holding Record** – Select a location from the drop-down list. This filter is useful when you have received multiple copies of a serial title at different locations as it allows you to display only those issues that belong to a specific holding record (i.e., that should be bound together).

8. Select the checkbox next to the individual issues to be added to a binding unit or select the top checkbox to select all issues.

9. Click Add to Binding Unit.
10. From the Add to Binding Unit dialog window, select **New Binding Unit** and enter the following details about the new binding unit:

a. **Bound Volume Details** – Determines the information used for the bound volume holding that is created when you complete binding of the binding unit.

i. **Enumeration Level** – Select an enumeration level from the drop-down list.
   - 1
   - 2
   - 3
   - 4

ii. **Enumeration** – Select enumeration caption(s) and associated value(s) for the bound volume. The enumeration of the bound volume does not need to match the enumeration of the issue(s) (e.g., the bound volume may only indicate the volume number whereas the issue(s) might indicate the issue number(s) as well (i.e., v. 16 vs. v. 16 i.1-4).

iii. **Chronology** – Select a chronological format from the drop-down list.
   - Date (Year, Month, Day)
   - Month (Year, Month)
   - Year (Year)
   - Season (Year, Season) – Spring First
   - Season (Year, Season) – Summer First
   - Season (Year, Season) – Autumn First
   - Season (Year, Season) – Winter First
   - Quarter (Year, Quarter)
   - Half Year (Year, Half Year)

After you select a chronological format, set the **chronology** for the chosen chronological format using the drop-down lists (e.g., Spring 2019 or March 1, 2019).

Note: The chronological format of the bound volume does not need to match the chronology of the issue(s) (e.g., the bound volume may only indicate the year whereas the issue(s) might indicate the season/month/day as well (i.e., 2019 vs. Spring – Winter 2019).

b. **Temporary Location of Items Sent to Bindery** – Determines the temporary shelving location assigned to the issue-level holdings when the binding unit is sent to the bindery.

i. **Holding Location** – Selected automatically based on the holding location of the issues you have selected.

ii. **Shelving Location** – Select a temporary shelving location from the drop-down list to assign to the issues once the binding unit is sent to the bindery.

c. **Permanent Location for Bound Volume**

i. **Create Holding** – Determines if a new holding is created for the bound volume upon completed binding of the binding unit. This option is selected by default. If deselected, no bound volume will be created upon binding of the binding unit.

ii. **Local Holding Record** – Determines where the bound volume will be located when it returns from the bindery. This can be different than the local holding record of the issues that have been added to the binding unit, allowing you to have bound volumes at a different location than the unbound issues.
Note: The default local holding record selected is based first on the local holding record of any previous binding units created. If there are no previous binding units, then the local holding record of the first issue selected will be selected by default. In both cases, you can change the local holding record of the bound volume if desired.

If there are 20 or fewer local holding records, you can select a different local holding record from the Local Holding Record drop-down list.

If there are more than 20 local holding records, click Select Local Holding Record. From the Permanent Location for Bound Volume dialog window, locate the local holding record you wish to use and click Select.

iii. (Optional) Public Note – Enter a public note for the bound volume holding (e.g., Missing Issue 3).

d. Send to bindery now – Select this checkbox if you plan to immediately send the binding unit and its issues to the bindery. This will set the status of the binding unit and its issues to Sent to Bindery and assign a temporary shelving location to the issue-level holdings.

11. Click Add to Binding Unit. Issues are added to the binding unit and will have binding status of Pending, unless the above option to send binding unit to the bindery immediately is selected.

Add issues to an existing binding unit

If you forgot to add issues to a binding unit when you created it initially, you can add issues to existing binding units.

1. On the left navigation, click Discover Items.
2. Select My Library Holdings from the Scope drop-down list.
3. Select an index from the Index drop-down list.
4. In the Term(s) text field, enter your search terms. The text field will expand to fit your search terms, if needed.
5. Click Search and then click the title of the serial you want to bind. The Issues screen opens.
   Note: If the title is not registered with one of the serial-related material types, click the Issues link in the top-right of the screen.
6. Click the Issues to Bind tab. A list of issues that your library has received is displayed.

Issues to Bind columns - Table

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barcode</td>
<td>The barcode assigned to the issue.</td>
</tr>
<tr>
<td>Binding Status</td>
<td>The binding status assigned to the issue (Not Bound, Pending, Sent to Bindery, or Bound).</td>
</tr>
<tr>
<td>Binding Unit</td>
<td>The binding unit to which the issue is assigned. Click binding unit name to open the Edit Binding Unit dialog window.</td>
</tr>
<tr>
<td>Branch</td>
<td>The branch where the issue is located.</td>
</tr>
<tr>
<td>COLUMN</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Call Number</td>
<td>The call number of the local holding record to which the issue belongs.</td>
</tr>
<tr>
<td>Chronology</td>
<td>Date or period of publication (year, quarter, season, month, week, day, etc.).</td>
</tr>
<tr>
<td>Date Received</td>
<td>The date the issue was received.</td>
</tr>
<tr>
<td>To enable this column, click the Configure button ( ) and select the Date Received checkbox.</td>
<td></td>
</tr>
<tr>
<td>Enumeration</td>
<td>The numbering scheme used to organize the issues of a serial publication (volume, number, part, issue, etc.).</td>
</tr>
<tr>
<td>Shelving Location</td>
<td>The location of the issue within the branch.</td>
</tr>
<tr>
<td>Type</td>
<td>The type of issue (Basic, Index, or Supplement).</td>
</tr>
</tbody>
</table>

7. **(Optional)** Filter the issues to locate the ones that you want to add to a binding unit. You can filter by the following:
   - **Binding Status** – Select one of the following statuses from the drop-down list:
     - ALL (default)
     - Not Bound
     - Pending
     - Send to Bindery
     - Bound
   - **Local Holding Record** – Select a location from the drop-down list. This filter is useful when you have received multiple copies of a serial title at different locations as it allows you to display only those issues that belong to a specific holding record (i.e., that should be bound together).

8. Select the checkbox next to the individual issues to be added to a binding unit or select the top checkbox to select all issues.

9. Click **Add to Binding Unit**.

10. From the Add to Binding Unit dialog window, select **Existing Binding Unit** and select a binding unit from the drop-down list.

11. Select **Send to bindery now** if you plan to immediately send the binding unit and its issues to the bindery. This will set the status of the binding unit and its issues to Sent to Bindery and assign a temporary shelving location to the issue-level holdings.

12. Click **Add to Binding Unit**. Issues are added to the binding unit and will have binding status of Pending, unless the above option to send binding unit to the bindery immediately is selected.
Edit and delete binding units

Note:

You can:

- Edit all fields for a binding unit that has not been sent to the bindery or bound.
- Edit select fields for binding units that have been sent to the bindery.
- Delete binding units that have not yet been bound.

You cannot:

- Make changes to a binding unit with a status of Bound.
- Remove issues from or change the temporary shelving location in a binding unit with a status of Sent to Bindery.
  If you need to perform either of these actions, you will need to recall the binding unit from the bindery.

Search for a serial title

Locate the serial title for which you want to edit or delete a binding unit.

1. On the left navigation, click Discover Items.
2. Select My Library Holdings from the Scope drop-down list.
3. Select an index from the Index drop-down list.
4. In the Term(s) text field, enter your search terms. The text field will expand to fit your search terms, if needed.
5. Click Search and then click the title of the serial you want to modify. The Issues screen opens.
  Note: If the title is not registered with one of the serial-related material types, click the Issues link in the top-right of the screen.

Edit a binding unit

1. From the Issues screen, click the Volume Binding tab. All of the binding units for the serial title are displayed.

Volume Binding columns - Table

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>The drop-down menu contains all of the actions you can take on the binding unit (Edit, Delete, Send to Bindery, Recall from Bindery, and Complete Binding).</td>
</tr>
<tr>
<td>Bound Volume Local Holding Record</td>
<td>The location where the bound volume can be found once the binding unit returns from the bindery.</td>
</tr>
<tr>
<td>COLUMN</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Branch</td>
<td>The branch where the bound volume is located.</td>
</tr>
<tr>
<td>Chronology</td>
<td>Date or period of publication (year, quarter, season, month, week, day, etc.).</td>
</tr>
<tr>
<td>Date Sent to Bindery</td>
<td>Date the binding unit was sent to the bindery.</td>
</tr>
<tr>
<td>Enumeration</td>
<td>The numbering scheme used to organize the issues of a serial publication (volume, number, part, issue, etc.)</td>
</tr>
<tr>
<td>First Issue</td>
<td>First issue assigned to the binding unit.</td>
</tr>
<tr>
<td>Issues</td>
<td>Number of issues assigned to the binding unit.</td>
</tr>
<tr>
<td>Last Issue</td>
<td>Last issue assigned to the binding unit.</td>
</tr>
<tr>
<td>Status</td>
<td>The binding status assigned to the issue (Pending, Sent to Bindery, or Bound).</td>
</tr>
<tr>
<td>Temporary Shelving Location</td>
<td>The temporary shelving location assigned to the issues when the binding unit is sent to the bindery.</td>
</tr>
</tbody>
</table>

2. (Optional) Filter the binding units to locate the one that you want to edit. You can filter by the following:
   - **Status** – Select one of the following statuses from the drop-down list:
     - ALL (default)
     - Pending
     - Sent to Bindery
     - Bound
   - **Bound volume local holding record** – Select a location from the drop-down list.

3. Click the **Enumeration link** for the binding unit you want to edit. The Edit Binding Unit dialog window opens. **Or** Select **Edit** from the drop-down menu in the Action column. The Edit Binding Unit dialog window opens.

4. From the Edit Binding Unit dialog window, edit any of the fields below.

   **Editable binding unit fields - Table**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enumeration Level</td>
<td>Select an enumeration level from the drop-down list. Options include:</td>
</tr>
<tr>
<td>FIELD</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>---------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Enumeration</td>
<td>Enter a <strong>volume</strong> and <strong>issue</strong>.</td>
</tr>
<tr>
<td>Chronology</td>
<td>Select a <strong>chronological format</strong> from the drop-down list.</td>
</tr>
<tr>
<td></td>
<td>◦ Date (Year, Month, Day)</td>
</tr>
<tr>
<td></td>
<td>◦ Month (Year, Month)</td>
</tr>
<tr>
<td></td>
<td>◦ Year (Year)</td>
</tr>
<tr>
<td></td>
<td>◦ Season (Year, Season) – Spring First</td>
</tr>
<tr>
<td></td>
<td>◦ Season (Year, Season) – Summer First</td>
</tr>
<tr>
<td></td>
<td>◦ Season (Year, Season) – Autumn First</td>
</tr>
<tr>
<td></td>
<td>◦ Season (Year, Season) – Winter First</td>
</tr>
<tr>
<td></td>
<td>◦ Quarter (Year, Quarter)</td>
</tr>
<tr>
<td></td>
<td>◦ Half Year (Year, Half Year)</td>
</tr>
<tr>
<td>Shelving Location</td>
<td>Select a <strong>temporary shelving location</strong> from the drop-down list to assign to the issues once the binding unit is sent to the bindery.</td>
</tr>
<tr>
<td>Create Holding</td>
<td>Determines if a new holding is created for the bound volume upon completed binding of the binding unit.  This option is selected by default. If deselected, no bound volume will be created upon binding of the binding unit.</td>
</tr>
</tbody>
</table>
### Local Holding Record

Determines where the bound volume will be located when it returns from the bindery. This can be different than the local holding record of the issues that have been added to the binding unit, allowing you to have bound volumes at a different location than the unbound issues.

To select a different local holding record, click Select Local Holding Record. From the Permanent Location for Bound Volume dialog window, locate the local holding record you wish to use and click Select.

### Public Note

Enter a public note for the bound volume holding (e.g., Missing Issue 3).

### Issues In Binding Unit

Click the Delete button next to an issue to remove it from the binding unit.

### Delete a binding unit

Caution: You cannot undo the deletion of a binding unit. Deleting a binding unit will remove all issues for the binding unit and return them to a binding status of Not Bound.

1. From the Issues screen, click the Volume Binding tab. All of the binding units for the serial title are displayed.

#### Volume Binding columns - Table

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>The drop-down menu contains all of the actions you can take on the binding unit (Edit, Delete, Send to Bindery, Recall from Bindery, and Complete Binding).</td>
</tr>
<tr>
<td>Bound Volume Local Holding Record</td>
<td>The location where the bound volume can be found once the binding unit returns from the bindery.</td>
</tr>
<tr>
<td>Branch</td>
<td>The branch where the bound volume is located.</td>
</tr>
<tr>
<td>Chronology</td>
<td>Date or period of publication (year, quarter, season, month, week, day, etc.).</td>
</tr>
<tr>
<td>COLUMN</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Date Sent to Bindery</td>
<td>Date the binding unit was sent to the bindery.</td>
</tr>
<tr>
<td>Enumeration</td>
<td>The numbering scheme used to organize the issues of a serial publication (volume, number, part, issue, etc.)</td>
</tr>
<tr>
<td>First Issue</td>
<td>First issue assigned to the binding unit.</td>
</tr>
<tr>
<td>Issues</td>
<td>Number of issues assigned to the binding unit.</td>
</tr>
<tr>
<td>Last Issue</td>
<td>Last issue assigned to the binding unit.</td>
</tr>
<tr>
<td>Status</td>
<td>The binding status assigned to the issue (Pending, Sent to Bindery, or Bound).</td>
</tr>
<tr>
<td>Temporary Shelving Location</td>
<td>The temporary shelving location assigned to the issues when the binding unit is sent to the bindery.</td>
</tr>
</tbody>
</table>

2. **(Optional)** Filter the binding units to locate the one that you want to edit. You can filter by the following:
   - **Status** – Select one of the following statuses from the drop-down list:
     - **ALL** (default)
     - **Pending**
     - **Sent to Bindery**
     - **Bound**
   - **Bound volume local holding record** – Select a **location** from the drop-down list.

3. Select **Delete** from the drop-down menu in the Action column. The Delete Binding Unit dialog window opens.

4. From the Delete Binding Unit dialog window, click **Delete** to complete the deletion.

**Send a binding unit to the bindery**

You can send a binding unit to the bindery once all relevant issues have been added to a binding unit. Sending a binding unit to the bindery creates a temporary shelving location for all issue-level holdings in the binding unit and changes the binding status to Sent to Bindery.

1. From the Volume Binding tab, locate the binding unit you want to send to the bindery.
2. **(Optional)** Filter the binding units to locate the one that you want to edit. You can filter by the following:
   - **Status** – Select one of the following statuses from the drop-down list:
     - **ALL** (default)
     - **Pending**
- Sent to Bindery
- Bound
  - **Bound volume local holding record** – Select a location from the drop-down list.

3. Select **Send to Bindery** from the drop-down menu in the Action column. The Send to Bindery dialog window opens.

4. From the Send to Bindery dialog window, click **Send to Bindery**.
   - The following confirmation message appears if all issue-level holdings are found: You have sent the binding unit [Enumeration] to the bindery. A new temporary shelving location has been assigned to these issues.
   - The following error message appears if any issue-level holdings cannot be found: The issues below could not be found and therefore a temporary shelving location could not be assigned to these issues. A table with the issues for which a temporary shelving location could not be set appears below the error message. The table includes the reason why the issue could not be sent (e.g., Issue no longer exists on Local Holding Record.).

**Recall a binding unit from the bindery**

If you need to make additional edits to a binding unit, or sent it by mistake, you can recall it from the bindery.

1. From the Volume Binding tab, locate the binding unit you want to recall from the bindery.
2. **(Optional)** Filter the binding units to locate the one that you want to edit. You can filter by the following:
   - **Status** – Select one of the following statuses from the drop-down list:
     - ALL (default)
     - Pending
     - Sent to Bindery
     - Bound
   - **Bound volume local holding record** – Select a location from the drop-down list.
3. Select **Recall from Bindery** from the drop-down menu in the Action column. The Send to Bindery dialog window opens. The Recall from Bindery dialog window opens.
4. From the Recall from Bindery dialog window, click **Recall from Bindery** to remove the temporary shelving location from the issues in the binding unit and return them to their original shelving location.
   - The following confirmation message appears if all issue-level holdings are found: You have recalled the binding unit [Enumeration] from the bindery.
   - The following error message appears if any issue-level holdings cannot be found: The issues below could not be found or the temporary shelving location has already been removed; therefore, the temporary shelving location for these issues could not be removed. A table with the issues for which a temporary shelving location could not be found appears below the error message. The table includes the reason why the issue could not be recalled (e.g., Issue no longer exists on Local Holding Record.).

**Complete binding of a binding unit**

You will need to complete binding of the binding unit once the bound volume returns from the bindery.

Caution: The action of completing a binding cannot be undone as it deletes the issue-level holdings and adds a holding for the bound volume. Please make sure all information is correct and you have the bound volume in hand before
performing this action.

1. From the Volume Binding tab, locate the binding for which you want to complete binding.

2. (Optional) Filter the binding units to locate the one that you want to edit. You can filter by the following:
   - **Status** – Select one of the following statuses from the drop-down list:
     - ALL (default)
     - Pending
     - Sent to Bindery
     - Bound
   - **Bound volume local holding record** – Select a location from the drop-down list.

3. Select **Complete Binding** from the drop-down menu in the Action column. The Complete Binding dialog window opens.

4. From the Complete Binding dialog window, select whether to **Use specified barcode** or **Use the barcode of the first issue** for the bound volume.
   - If you select **Use specified barcode**, you can:
     - Enter a different barcode than any of the issues selected for the bound volume.
     - Leave the Barcode field blank to not assign a barcode for the bound volume.
   - If you select **Use the barcode of the first issue**, the barcode of the first volume in the binding unit will be used for the bound volume.

5. Click **Complete Binding**. The completion process involves checking the availability and then deleting each issue in the binding unit. Binding units that contain a large number of issues may take longer than expected. Please wait for the confirmation message to appear before taking further action.
   - The following confirmation message appears if all issues were located and removed: You have completed binding of [number] issues. The issue-level holdings have been deleted, and a new holding for the bound volume has been created.
   - The following error message appears if any issues were not located and removed: Some issues could not be found on the local holding record and therefore could not be deleted. Review the local holdings record to make sure no issues remain that have been bound.

   A table with the issues that could not be located and removed appears below the error message. The table includes the reason why the issue could not be located and removed (e.g., Issue no longer exists on Local Holding Record.).