Discover how to create a serial copy record in OLIB.

**Overview**

For every physical copy of a serial that you receive in the library you should create a serial Copy record that belongs to the Serial Title. The correct number of serial Copy records are created automatically when you enter a subscription order for a serial.

The details for the Serial Copy (held at Title level), are used to create values in the Issue Copies when the Issue is checked in.

Serial copy records are needed for the following:

- **Circulation lists**
- They are part of subscription ordering
- For auto-generating the next batch of Issues
- They show the Location for this physical Copy of the Serial
- For setting up a Check in popup message
- They show the default Status for issues checked in
- They populate values into the Issue Copy records at check-in time.

If you place a subscription order for e.g. 3 copies of a serial, the system creates 3 serial Copy records when you authorise the order. You then need to edit the Copy records prior to issues generation.

**Edit a Serial Copy record**

1. Navigate to Titles.
2. Search for the Title record that you have subscribed for.
3. In the Management page in Serial Copies, click Copy and switch to modify.
4. Update the fields listed below.

For serials that you do not have a subscription for, new serial copy records can be added in the Serial Title>Management page prior to issues generation.

**Create a new Serial Copy record**

1. Navigate to Titles.
2. Search for the serial title that you want to create a copy record for.
3. In the Management page, switch to modify.
4. In Serial Copies, click New.
5. Edit the fields listed below.

**Complete Serial Copy details**

1. The **Owner Location** and **Check in Location** fields will be populated automatically from the logged in users location. They default to the PC Location and you can amend as required. Both fields are mandatory. The owner location determines the location which is applied to the copy record when the issue is checked in. The [check in location](https://help.oclc.org/Library_Management/OLIB/Serials/Issues_generation/15Serial_copy_records) is useful when staff need to check issues in for a specific location/site.

2. If you set the **Receipt Date Flag** at serial copy level, it will be used in preference to the title level setting to calculate the expected date of receipt of this serial copy's issue copies. This can be useful in a multi-site library where one site receives its copies of an issue at different times to another site. For example, library site A might receive its copies of an issue a few days after library site B. OLIB's [Claims](https://help.oclc.org/Library_Management/OLIB/Serials/Issues_generation/15Serial_copy_records) process can be configured to claim for site A's copies ahead of site B's copies of the same issue.

3. The **Autogenerate?** flag defaults to Yes. This means that once the expected date of the last issue generated is reached, more issues will be generated. If you require this to happen in advance, you can enter a minus figure (in days) in the **Autogenerate Days** field, e.g. -30 means that the next batch of issues will be generated about a month before the last one of the previous batch is expected. If you leave this field blank, new issues will auto-generate on the date the last issue is expected. From OLIB 9 Service Pack 12, if you use the Cancel serial copies (selected) action (from a Serial Copies search) it will also set the Autogenerate flag on the Serial Copy record to No.

4. You use the **Iss.Copy Check-In Status** field to select the default status that will be given to issues when they are checked in, e.g. In Circulation (according to Circulation List), Owner Copy, and so on. This information is held at the Issue Copy level. See also **Copy Status** below.

5. A **Check In Popup** message can be applied to an individual Serial Copy as well as to the Title. If there is a message set at both Title and Serial Copy level, both will display at Check-In. Up to 2000 characters.

6. By default OLIB creates issue copies on Check in; you can configure **Create Copy on Check-In?** to Yes or No at system level (OLIB Defaults) and Serial Copies level. For example you may have set to Yes at system level but set to No for some individual Serial Copy records.

7. Select a default **Copy Category** if required. When an issue is checked in the copy linked to that issue picks up the default setting. Alternatively if you leave it blank, then the checked in copies will pick up the value set in the serial Title. If this is blank then they will default from the value in [Admin Client Defaults](https://help.oclc.org/Library_Management/OLIB/Serials/Issues_generation/15Serial_copy_records).

8. Select a default for **Other Issues Copy Category**. ‘Other Issues’ refers to your previous / ‘back’ copies. This allows your ‘current’ copy to have category Reference for example and your other previous issues to be e.g. Lending. When you check in a new issue copy for this serial copy, the other issue copies already linked to this serial copy will have their category changed to this value if their category is currently the same as that of the new issue copy. If this value is not set at either serial Copy or serial Title level, the copy category of other issues’ copies remains unchanged.

9. Select a default **Copy Status** that will apply when an issue copy linked to this serial copy is checked in. Alternatively if you leave it blank, then the checked in copies will pick up the value set in the serial Title. If this is blank then they will default from the value in [Admin Client Defaults](https://help.oclc.org/Library_Management/OLIB/Serials/Issues_generation/15Serial_copy_records). If this is not set then they will be at status Available.

10. Select a default **Copy Shelf** that will apply when an issue copy linked to this serial copy is checked in. When entering a shelf in the Shelf field, the shelf you selected is validated against the location in the Owner Location field to ensure that the Owner Location is the same as the location specified in the shelf record. If they do not match, a
message is displayed: the shelf and location combination do not match. You will not be able to move out of the Shelf field until you have either selected a different shelf or cleared the field altogether.

Note: The above default copy settings take immediate effect – it is not necessary to regenerate the issues not yet checked in. If the above Category, Status, Shelf defaults are left blank, the checked in copies will inherit the values set in the equivalent serial Title; if these too are blank, then the values are inherited from Admin Client Defaults (except Shelf).

11. Link the serial copy to the Circulation List which is to be printed out whenever you check in an issue belonging to this serial subscription copy. If lists have been created in advance search and link the list back to the serial copy, if not then you can create a list at this point.

Note: If you want a circulation list to be printed it is normally added to the Serial Copy before issues are generated. If it is added later then you will also need to use the Update Circ.List on Iss.Copies button. This will assign the circ list to all the Issue Copies that are not yet checked in.

12. **Update Circ.List on Iss.Copies:** This button is available in modify mode. It will update the Circ List on the expected issue copies with whatever value (or NULL value) is currently in the Serial Copy record.

13. If the Controlled Circulation List function is used (the issues are recorded as going on loan and are returned to the library between each user), then set Controlled Circ.? to Yes.

14. If required you can change the default Subscription Type, enter a Supplier Reference, and enter any Notes as required. (Additional Subscription Types can be created in the Subscription Types domain if needed, e.g. Subscription, E-Journal, Donation).

15. If the Acquisitions system is being used to process serial subscriptions Supplier will be completed. If not, and you want to use claiming, it is essential to link the Serial Copy to a supplier. (The Supplier should also have an address record set with the address type of O Order).

16. The Cancelled flag should only be set as part of subscription cancellation. Related Subscriptions link to the subscription order for this Serial Copy. Odue Claim Sequence is required for serial Claiming.

17. Save the Serial Copy record. It is visible to the title record on the management sheet. Repeat as required for other subscriptions to the same title.

**Additional fields with Layout Manager**

The system manager can use Layout Manager to add Binding Instructions. Any number of binding instructions records can then be added to a serial title’s Copy records. They include fields like Binding Style, Cover Colour, Spine Lettering, Binder (linked to Suppliers), Sent To Binders, Returned From Binders, etc.

When a new bound volume record is created and issue copies added to it, copies of the respective serial Copy’s binding instructions records are automatically created and linked to the new Bound Volume record. This copy of the generic binding instructions can then be edited to reflect the instructions specific to that Bound Volume record as required.

**Delete serial copies**

There are three ways to delete serial copies:

- The Delete serial copy action available from the Serial Copies domain hitlist
- The same Delete serial copy action available from the Serial Copies list box attribute in the Titles domain
- The Delete option below the Serial Copies list box attribute in the Titles domain (only displayed when in modify mode)
Note: When you use these actions, a message Are you sure? is displayed. This makes it clear that checked in issue copies will also be deleted if you delete the serial copy. Responding Yes will delete the serial copy and associated issue copies, copies, etc. Responding No will return to the hitlist without doing anything.