Discover how to discard serial issues in OLIB.

Overview

As new Issues are received into the library on an ongoing basis, you may wish to limit the number of older Issues that are retained in OLIB. Issues can automatically be discarded from OLIB by using one of the following methods:

Number to Retain

The field is in the Management page of Serial Titles and on the Serial Copy record, so that different copies of the same journal (e.g. held at different locations) can operate their own holding periods.

It is a numeric field where you can specify how many received issues of that journal should be in existence at any one time. For example, for a 3 year holding of a quarterly journal, it would be set to 12, and for a 6 month weekly journal holding it would be set to 26. An overnight process will identify any issues which are due for deletion, e.g. if an issue of a quarterly journal with a holding period of 12 (i.e. 3 years) had been checked in that day, the system would flag the 13th most recently received issue of that journal for deletion. This will be a "retrospective" process. For example, if for some reason the 14th most recently received issue of that journal had not yet been deleted, it would also be flagged for deletion at the same time.

The flagged issues will then be deleted and an alert will be sent to nominated members of staff to notify them of the deletions so that they can remove the physical copies from the shelf. The subject of the email, the contents of the email and the list of nominated members of staff to which the alert should be sent will be definable by the system manager in the Notices domain.

A typical message would read:

The following issues have been deleted from the database.
Please remove them from the shelves and discard them:

(2 copies)

Quarterly Journal of Waste Management, Vol. 25 No.3
October 2003 (1 copy)

The Number To Retain field is a 3-digit field, so that the maximum holding period for any one journal will be 999 checked in issues. If nothing is entered in this field, no issues of that journal will be automatically deleted.
Serial Issues Deleted Notice: An alert can be configured to notify designated members of the library that serial issues have been deleted. These serial issues can then be removed from the library shelves. A frequency can be set so that the notice is run at regular intervals, for example, once a month. Alternatively, the notice can be run manually. A notice will only be generated if serial issues have been deleted from the system.

Retention date

Some libraries may not wish to use the automated Number to Retain field to discard journal issues. Alternatively there is a 'date to retain until' feature. This is visible in the Serials - full layout in the Details tab.

A date can now be entered on the Journal title record.

1. To identify items which are due for discard, run a Titles search filtered by Media Type = Journal & Date to Retain Until before e.g. 01-Jan-2009.

2. Once the issues have been discarded, update the Journal Title and set the Retention Date to the next time when issues should be discarded.