Copy and availability details

Learn how to add copy availability details to a title in OLIB.
► Searches > Titles
► Searches > Copies

In OLIB the availability details of a physical item are stored in 'copy' records. A bibliographic Title record may have any number of physical copies associated with it. A copy record exists for each physical item and these store details such as Location, Sub-location, Circulation status and specific Shelfmark.

In order to add a copy to a title using the default settings for category and status, simply enter the barcode into the Copies field.

When creating a new Title and proceeding to Copy details, default settings are taken from system defaults and options settings. The fields completed by default are:

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Taken from the location of the logged in user.</td>
</tr>
<tr>
<td>Sub-location</td>
<td>This is populated if the above Location has a default Sub-location set.</td>
</tr>
<tr>
<td>Shelfmark</td>
<td>Either defaults to the primary classmark or the primary classmark plus the verbal extension (first 3 letters of the first author's surname). This is set in OLIB Defaults. Alternatively may default from the verbal extension (Verbext) in Title details.</td>
</tr>
<tr>
<td>Category</td>
<td>Taken from the setting in Admin Client Defaults.</td>
</tr>
<tr>
<td>Status</td>
<td></td>
</tr>
</tbody>
</table>

Create the copy using the default settings

1. In Title details, in modify mode, locate the Availability section.
2. Enter the barcode in the space immediately preceding >> and then click the double arrow.
3. OLIB creates and displays the new copy record with the default settings.
Amend a copy created with the default settings

1. In view only mode, in Title details: **Availability**, click on the copy record link to display the copy.
2. Switch to modify mode.
3. For example the **Category** could be changed to Reference and the **Shelf** also set to Reference.
4. **Save and Close** the changes.
5. Use breadcrumbs at the top of the record to return to the title.

Create a new copy so that all the default settings can be changed

1. In modify mode, in Titles: **Availability** click **New**.
2. A page to create a new copy is displayed, where you can edit the default settings.
3. Click **Save and Close** to register the copy record in the Availability section of the title record.

Create a copy specifying Copy Category and Location

This procedure creates a new copy which does not have the Category and Location defaults applied.

1. In Titles, in modify mode locate **Availability**.
2. Use the first drop down box to select the **Copy Category**.
3. Use the next drop down box to select the **Location**.
4. Enter the barcode in the following box and click >>.

OLIB adds the new copy.

Add an extra copy to an existing Title

In many cases a new item in the library is already in stock and catalogued, and you need to add an extra copy record. If configured on your system, this may be possible from the Titles hit list - this is the fastest method. Alternatively, add a Copy from the Titles main details.

Titles hit list: add new copy for your location

In the Titles domain hit list, this is a quick way to add a copy to a Title that already exists.

1. Carry out a search to locate the title in the **Titles** domain.
2. In the hit list, check the box to select the relevant Title that requires an additional Copy record.
3. From the list of Actions choose **Add Copy at Current Location**.
4. OLIB opens the **Copies** layout where you can quickly add holdings information. The copy record defaults to the **Location** where you are logged in.
Title main details: Availability

Search for the title that you want to add an extra copy to.

1. Put the title record into Modify mode.
2. In the Availability section type or scan the barcode of the new copy into the Copies field.
3. Click >> and a copy will be created using the default copy settings.
4. If you need to change the default settings click on Actions - Create New.
5. A page to create a new copy is displayed, where you can edit the default settings.
6. Click Save to register the copy record in the Availability section of the title record.
7. Repeat the process as required and Save the title when completed.

When you add another Copy in Title main details as above, OLIB provides defaults:

- If Location is empty, it defaults to the currently logged in User’s location
- If Copy Category is empty, it defaults to the value in Admin Client Defaults

If Shelfmark is empty, OLIB generates a shelfmark. This field is pre-populated with the generated shelfmark value (based on the primary classmark and the primary author as normal), but you can make any free text adjustments or corrections (e.g. prefixing it with “REF”) before clicking the fast forward button to add the copy record.

Note: if you want to include Shelfmark in the default fields above, the System Manager first needs to add the attribute to the General layout using Layout Manager (Copy Shelfmark Entry (ti_shelfmark_entry). This must be added to the layout after the Barcode field.

Sub-location

Each Location record can optionally have Sub-locations configured by the system manager. These can represent physical areas within a Location, for example, Ground Floor, First Floor and so on. These are unique to each Location record. One of the Sub-locations can also be flagged as default, so that when new Copies are created, the default Sub-location is automatically entered. You can change this to another Sub-location within the same Location.

To change the Copy Sub-location

1. In Titles locate the Availability section.
2. Check the box next to the Copy/Copies to be updated.
3. Click the Actions drop down and from the available actions select Update copy sub-location.
4. OLIB displays a list of other Sub-locations. Choose the preferred Sub-location (within the same Location).
5. Click OK to return to the Titles screen. Use the Refresh icon to show the change.

The Sub-location can also be entered or edited in the Copies screen:

1. In Titles: Availability, click the Barcode link to go to the Copies screen.
2. Modify record and select an alternative from the **Sub-Location** drop down.

3. Click **Save and Close**. Click the **Titles** link to return to Titles: Availability.

This change can also be made directly from the **Copies** domain.

The Sub-location for the Copy is displayed in parentheses after the Location, whenever the Location is displayed - e.g.
copies hit lists:

9064573465  Main Library (First Floor) 362.17 BER  Standard  Available

**Shelf area**

As well as the Location, Sub-location and Shelfmark to indicate the whereabouts of a Copy, the Shelf can optionally be
used. This is cataloguing **reference data** that can be a physical area within a Location e.g. Large Print. These are
created in the Shelves domain and can be used in any combination with Location records. The system manager may
have configured a default Shelf for each specific Location.

An individual Copy can be edited and the shelf information recorded, or you can use an 'Action' in the hit list to update a
selection of Copy records to a specific Shelf area:

1. In **Copies**, search for the relevant Title(s).
2. Check the box for those Copies you would like to update.
3. In Other Actions select **Update Copy Shelf**.
4. In the update dialog window, select the preferred shelf, e.g. Large Print. OLIB confirms copies are successfully
   updated.

This information is displayed after the Sub-location and before the Shelfmark, e.g. in copies hit lists:

9064573465  Main Library (First Floor) Large Print 362.17 BER  Standard  Available

**Location specific shelves**

In Reference Data, a **shelving area** can be assigned to a specific Location record rather than being usable with any
combination of Location records. If this is configured on your system, it controls shelf assignment when adding or
modifying a Copy record. Depending on configuration, the Shelves available to you in the copy record may be limited
depending on the Location you have already selected.

**Shelfmark generation**

Whenever a new copy record is added (either directly from the Titles screen or indirectly, e.g. during Acquisitions check
in), the copy shelfmark can be automatically populated with the title’s primary classmark and, optionally, the first three
characters of the primary author’s surname ('Verbal Extension'). If the author is a corporate body or conference the first
3 letters of the author are still used.

- **Auto Generate Shelfmarks** This setting is included in **OLIB Defaults** (Cataloguing). If it is set to Yes, the Verbal
Extension is added to the primary classmark when the shelfmark is generated. If it is set to No, the Verbal Extension is ignored when the shelfmark is generated.

• **Generate (update) shelfmark** It is often necessary to update the copy shelfmark after the copy record has been created, for example if the primary classmark or author changes. This can happen most frequently when an item is created from Acquisitions check in and then passed to a cataloguer for comprehensive cataloguing. As the title is being catalogued, the primary author is often changed and the classmark is assigned. By this time, however, the copy record has already been created. To update the Shelfmark, a Generate shelfmark action is available which automatically regenerates the copy shelfmark based on the title’s current Classmark, Verbal Extension and system-level Auto.Generate Shelfmarks setting.

1. In the Availability section of the title record check the box to select the copy.
2. From Actions choose **Generate Shelfmark** OR -
3. From the Copies domain search on eg. Copies by Shelfmark and select the copies whose shelfmarks you wish to regenerate.
4. In the available Actions for the hitlist, choose **Generate shelfmark**.
5. A message is displayed to confirm that the shelfmarks have been regenerated successfully.

### Reserved Copies

When you add a new Copy record to a Title, the new copy is automatically added to the reservation list if there are any active reservations for that Title. The copy being added must match the parameters set in the Copy, user’s Location and Loan Terms records for it to be reservable.

In addition, when you modify a Copy record, a check is made to determine whether there are any active reservations on the Title that the Copy can now be used to fulfil.

For example, if you change the Copy Category of an item from e.g. Reference (which you may have configured to be not reservable by anyone) to Standard (which you may have configured to be reservable by users at the Copy’s Location), the Copy will now be added to the reservation list.

Note: a variety of searches are available in the Copies domain. This is also accessible from the Circ. Desk.