

Adding Serial Items

If you do not use the serials module, you will enter your serials (magazines, etc.) by item. However, this procedure has changed from the procedure in Dynix Classic, follow the steps closely.

To enter a serial that you have been receiving as an item:

1. After locating the bibliographic record using search methods from Horizon Basics and after verifying that this is the correct serial bibliographic record by using the information provided in the Horizon Items manual, click [**Show Copies**] or press [**ENTER**].
2. Highlight one of the items you already own, press **F10**.
3. Highlight [**Copy/Item List**]. Click [**OK**] or press [**ENTER**].
4. This will take you to your list of items.
5. From this screen, click [**New**]. The following window will appear:

The screenshot shows a web-based form for adding a serial item. The form is organized into several sections with labels and input fields. At the top, there is an 'Item Barcode' field. Below it, the 'Title' is 'Newsweek'. The 'Bib #' is '36026', 'Item#' is blank, and 'Copy#' is '7110'. The 'Created' date is '05/18/2004' and 'Updated' is blank. There is a 'Staff-Only' checkbox which is unchecked. Below these are 'Owning Location' and 'Circulating Location' fields. To the right of the 'Circulating Location' field is a 'Codes' button. The 'Call No.' field is a wide text input. Below it is a 'Copy Statement' field. The 'Serial Volume No.' and 'Price' fields are small text inputs. Below these is a 'Source' field. The 'Item Type' and 'Collection' fields are small text inputs. To the right of the 'Item Type' field is a 'Codes' button, and to the right of the 'Collection' field is another 'Codes' button. Below these is an 'Item Note' field. The 'Item Status' is 'li' and 'On Shelf' is displayed in blue text. To the right of the 'Item Status' field is a 'Codes' button. At the bottom, there are 'Status Updated', 'Inventoried', and 'Fast-Add' (unchecked) fields. At the very bottom of the form are four buttons: 'Close', 'Save', 'Page Up', and 'Page Down'. The page number 'Page 1 of 2' is displayed at the bottom right.

| | | | | | |
|----------------------|----------------------|-------------|----------------------|------------|--------------------------|
| Item Barcode | <input type="text"/> | | | | |
| Title | Newsweek. | | | | |
| Bib # | 36026 | Item# | | Copy# | 7110 |
| Created | 05/18/2004 | Updated | | Staff-Only | <input type="checkbox"/> |
| Owning Location | <input type="text"/> | | | | |
| Circulating Location | <input type="text"/> | Codes | | | |
| Call No. | <input type="text"/> | | | | |
| Copy Statement | <input type="text"/> | | | | |
| Serial Volume No. | <input type="text"/> | Price | <input type="text"/> | | |
| Source | <input type="text"/> | | | | |
| Item Type | <input type="text"/> | Codes | | | |
| Collection | <input type="text"/> | Codes | | | |
| Item Note | <input type="text"/> | | | | |
| Item Status | li | On Shelf | Codes | | |
| Status Updated | | Inventoried | | Fast-Add | <input type="checkbox"/> |

Close Save Page Up Page Down Page 1 of 2

| | | | |
|-----------------------|----------------------|--------------------------------------|--|
| Checkin Note | <input type="text"/> | | |
| Last Checkout | No. of Checkouts | | |
| Due | Time | Out to Borrower No. | |
| No. of Pieces | No. of Renewals | | |
| No. of Phone Renewals | No. of OPAC Renewals | | |
| Call Type | <input type="text"/> | <input type="button" value="Codes"/> | |
| Local note | <input type="text"/> | | |
| Internal Note | <input type="text"/> | | |
| Checkout Location | | | |

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6. For consistency and to help the borrowers find the correct record, these fields need to be filled in the same way every time you receive an issue.

Field Definitions:

[Item Barcode] Scan in your next barcode.

[Owning Location] Enter your 3-letter code.

[Circulating Location] Enter your 3-letter code.

[Call No.] Enter your call number for this item.

[Copy Statement] Enter the copy information for this item. Be as consistent as possible!

Examples: Spring 2004

OR

Vol. 4, No. 10 (Aug. 2004)

OR

Nov./Dec. 2004

[Serial Volume No.] DO NOT FILL THIS IN.

[Price] Enter the price of the item.

[Source] Enter the source, if needed.

Example: LSTA Grant, Weed and Feed

OR

Gift from Mr. And Mrs. John Doe

[Item Type] Enter your item type code. This controls circulation.

[Collection] Enter your collection code. This indicates where the item is located in your library.

[Item Note] Enter any notes for this item.

[Item Status] Will default to “li” which means “on shelf”.

[Checkin Note] Enter any checkin notes.

[Call Type] DO NOT FILL THIS IN.

[Local Note] Enter any local notes.

[Internal Note] Enter any internal notes.

7. Click **[Save]** and then **[Close]**.

To enter a new serial as an item:

If you purchase a new subscription, you must add a copy record to Horizon before you can add the item.

1. After locating the bibliographic record using search methods from Horizon Basics and after verifying that this is the correct serial bibliographic record by using the information provided in the Horizon Items manual, press **F10**.
2. Highlight **[Copy/Item List]**. Click **[OK]** or press **[ENTER]**. This opens the item screen for the first serial module user for this bibliographic record. **DO NOT ADD YOUR ITEM HERE!**
3. To avoid adding your item to a serial module user’s copy record, you must close this window by clicking on the ‘X’ in the right-hand corner or press **[ESC]**.
4. Closing the item list window will return you to the copy item screen.
5. On the copy item screen, click **[New]**. The following screen will appear:

Bib No. 36026 Copy Rec. No.

Descr.

Location Codes

Collection Codes

Call No.

Serials Media Type Codes

Summary of Holdings: Yes Staff-Only Copy Acq Controlled No

PAC Display Note

Close Save Page Up Page Down Page 1 of 1

6. You must fill in the fields as consistently as possible.

[Descr.] Type in the name of your library. Be consistent!

[Location] Your 3-letter code.

[Collection] Your collection code for periodicals.

[Call No.] Your call number.

[Serials Media Type] You have been assigned a media type. Type your 3-letter code and 'mag'. Example: LTNMAG. If necessary, click on the **[Codes]** button to find your serial media type.

[PAC Display Note] Type in the name of your library. Do not use your code. This will be displayed in LINC Pac. Examples: Lincoln Trail Libraries System OR Arcola Public Library.

7. Click **[Save]** and then **[Close]**.
8. Once the new copy record has been created, you will be taken back to the list of copy records.
9. To add your item to this new copy record, highlight your copy record and click **[Items]**. Then follow steps 7-9 listed in the previous section.