FLARE Processing Manual

POLICIES AND PROCEDURES
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Using this manual

The purpose of this manual is to detail FLARE processing policies and procedures. It is a work in progress.

It was developed by Tabatha Pursley, Sarah Prentice, and Madison Curry, in conjunction with Naomi Young and Hank Young.

Some of the instructions covered in this manual are specific to the type of institution.

- State University System (SUS) Universities are public universities within the state of Florida, like the University of Central Florida.
- Independent Colleges & Universities of Florida (ICUF) are private, not-for-profit, educational institutions based in Florida, like the University of Miami.
- The University of Florida (UF): The Auxiliary Library Facility (ALF), The Marston Science Library (MSL)

Training manuals, which are more detailed workflows for each project, are available here: SUS training manual, ICUF training manual, UF MSL training manual.

Processing workflow overview for ICUF serials at ILF

1. Retrieve items from shelf and search the title in the JSTOR-UM spreadsheet to confirm there is no duplicate material.
2. Check the JSTOR list on Google Drive for the title. Sticker the items accordingly.
3. Find the OCLC# in the UM-ILF spreadsheet and search the OCLC number in ALEPH.
4. Examine and review the BIB record with the physical items.
5. Search the OCLC and ISSN numbers to ensure there are no duplicates.

6. If there is an existing FLARE record, edit it to reflect the items you are adding.

7. If there is not a FLARE record, create a new HOL record. Run the 852 location macro, add the pairs and action notes, and copy the 022 and the 035 from the BIB record into the HOL record.

8. Go to the items list. Create item records for all of the items you have with you.

9. Duplicate item barcodes, if necessary.

10. Record your work in the ILF Work Logger.

11. Put the items in the correct location for them to be trayed.
Processing workflow overview for SUS serials at ILF

1. Retrieve items from the shelves and scan the barcode of the first item.
2. Examine the BIB record thoroughly against the items you physically have.
3. Search the OCLC and ISSN numbers to ensure there are no duplicates.
4. Open the FLARE holding that has already been created.
5. If the FLARE record has already been completed by another processor, edit it to reflect the items you are adding and check for duplicate items.
6. If the FLARE record is empty, copy the 022 and 035 from the BIB record into the HOL record. Then, run enter the pairs and action notes.
7. Go to the item records and alter the item description to our standards, being sure to also check the barcodes.
8. Do not change the Item Process Status. They should already say In Process and will be changed when they are trayed.
9. Duplicate item barcodes, if necessary.
10. Enter your work into the work logger.
11. Put the items in the correct location for them to be trayed.
Processing workflow overview for UF items at ILF

1. Retrieve the items from the shelves and scan barcode of the first item to access the record.

2. Determine if your items are monographs, monographic series, or serials.

3. Examine and confirm the BIB record against the physical items you have.

4. Search the OCLC and ISSN numbers to ensure there are no duplicates.

5. If there is a FLARE holding, edit and update the holding to reflect the items you are adding. If you are logged into UF, login to FLARE to do this.

6. If there is not a FLARE holding, open the UFSCI holding record. If your items are monographic series or serials, add pairs and action notes for serials. If your item is a monograph, the program that brings over GFed items will add the monograph action notes automatically.

7. Go to the item records. Examine and confirm the item records, and then enter GF in the Item Process Status.

8. Duplicate item barcodes, if necessary.

9. Enter work into work logger.

10. Put the items in the correct location for them to be trayed.
Processing workflow overview for ALF

1. Retrieve items from specified shelf location and load cart with volumes of a given title.

2. When back at your desk, access the record for the title you are working on by scanning the barcode of one of the volumes into ALEPH.

3. Review the UFSTO holding and items to see if the entirety of material for that title has been pulled. If not, go back to the shelf and search for the rest of the items and then create a new holding for them.

4. Examine and confirm the BIB record with the physical items.

5. Check to see if there is already an existing FLARE record. If so, are any of your items duplicates? If yes, withdraw the record, stamp the item withdrawn, black out the barcode, and dispose of it.

6. If there is a FLARE record, edit it to reflect the items you are adding and suppress the UFSTO holding record.

7. If there is not a FLARE record, update the UFSTO holding with the pairs and action notes. Later, a program will run to create a FLARE holding using this information and then suppress this holding.

8. Go to the items list. Item by item, check the item description for correct format, check if there is a barcode, remove the temporary location check, and then enter GF in the Item Process Status.

9. Enter your work into the work logger to reflect what you processed and what you withdrew.

10. Put the items in the correct location for them to be trayed.

11. Always go back and check your records the next day to make sure the program ran correctly.
Spreadsheets

ICUF items
When starting a new ICUF title, open the corresponding spreadsheet in Excel. Use the Find and Replace function (Ctrl+F) and scan or manually enter the first item’s barcode. If the barcode is in the spreadsheet, locate the corresponding OCLC number. Check to be sure that all of the items with that title are on the same record. Often items will have a title change and will have their own record.

If the title cannot be found in the spreadsheet, search the university’s public catalog. Select “LC Call Number” from the drop-down box and search by the call number on the spine of the item. The OCLC number will be in the record. If there is still no OCLC number listed, attach a note to the first item and place it on the appropriate book cart.

Next, check the JSTOR list to see if the item is a JSTOR item using the title. If the item is on the spreadsheet, note whether there is a ‘yes’ in the Archive for 25 years, Keep for now, or Dispose columns. If it is in the Archive or Keep column, process the items but then place them on the correct shelf separate from non-JSTOR items. If the yes is in the Dispose column, do not process the items. Place the items on the shelf appropriate for JSTOR disposals.

SUS items
SUS titles will already be entered into FLARE, so there will be no spreadsheet to search for title information. By scanning the barcode for the first item in a title, the record will pull up.

The JSTOR spreadsheet does need to be checked. If the item is on the spreadsheet, note whether there is a ‘yes’ in the Archive for 25 years, Keep for now, or Dispose columns. If it is in the Archive or Keep column, process the items but then place them on the correct shelf separate from non-JSTOR items. If the yes is in the Dispose column, withdraw the item from FLARE and make an OPAC note telling if it is being disposed for JSTOR or if it is a duplicate.

For SUS items, if you pull up a title and realize you have a duplicate, dispose of the item(s).

UF items
UF titles will be accessible through the UF side of ALEPH by scanning the barcode of the first item.
Navigating in ALEPH

ALEPH is a cataloging system that creates the OPAC Catalog that allows patrons to see what items a particular collection has. When you first open ALEPH, you will need to login. After that it will appear as a blank page.

The four tabs to the left are your main tools for navigating within ALEPH. The one farthest to the left will show your open tabs. When no records are open, it will appear as it does above. The next tab will open up your items for the record you are in. The third is the Task Manager. You won’t need to use this tab. The fourth tab is the search tab. This is where you can search for different records if the barcode you have does not bring up a record.

Above the tabs you have a few quick search bars. You can enter the bibliographic number into the first one to bring up a record. In the tab just below it, you have the option to search with a barcode, BIB number, ADM. Number, or call number.
Opening a record with a barcode

If your items are from an SUS institution, like UF, then you will be able to search the barcode to bring up the item. It will open in the items tab, so to see the record, click the icon on the right side of the screen.

If you have ICUF items that need to be searched for with the OCLC number, proceed to the next section, Opening the BIB record using the search tab.

Once a BIB record is open, it will show under the Edit Records tab within the record tab on the left-hand side.

Your BIB record contains all of the information cataloged for a title or a series. Every piece of information has a field. For example, field 245 contains the main title. If you are unsure of what information the field contains, the red text to the left of the field will tell you.

While you should read over all of the fields when matching up the information you have in hand to the record, there are some fields that are more important to our process than others. These will be pointed out in the Reviewing the BIB record section.
To the left of the record, you see all of the holdings that this record has. ALEPH contains all Florida SUS holdings, and you will often come upon records that contain many different holdings or records that contain only our holding. If you double-click on a record here, it will open it so you can view or edit it.

The top UXU01- is the BIB number, the UXU60 contains all of the holdings, and the FLR50 contains the items, but you will only be able to view FLARE items while logged into FLARE.

Below the record are a few more tabs containing information. The tabs for Messages, Browser, and Objects are always empty for us, so they will be skipped.

Tab 2 is Tag Information. If a field is not made clear from the red text, you can click on the blue field and it will open up in here.
It tells you that this field is for the dates of publication. It also tells you what, if any, the indicators following the field mean. In this case there is a 0 in the first indicator spot, which means the dates are formatted. It also tells you what the subfields are. In this case it is a, which means it is the dates of publication. Other subfields may be used to tell you other information within the same field.
Tab 4 displays all of the holding records. It is here that you will create a holding if there is not already one for FLARE. You can also double-click on a record to view or edit it.

At the bottom right-hand side of ALEPH there is another small toolbar.

- The first four are the four different parts of ALEPH. We use the second icon, the Cataloging program.
- The key icon is the tool you will use if you need to switch your login information with ALEPH already open. You can login between UF and FLARE, if necessary.
- Next is your language option, where English is selected.
- The house to the left shows you where you are in the record. Currently it shows that we are in the BIB record.
- The printer button will allow you to print the page you are on, and the X will close all ALEPH applications.

If a FLARE record has already been created, you will want to open the existing record by double clicking either within the HOL record tab or from the list of HOL records on the left.
Now that both the BIB and HOL record is open, they both show under the Edit Records tab. If you are in the HOL record and want to move to the BIB record, double-click on the BIB number under the Edit Records tab. If you are in the BIB, double-click on the HOL record number.
Opening the BIB record using the search tab

When starting a new title, always begin with a clean slate. Close all other records and items that may be open in ALEPH.

Search the OCLC number in ALEPH to find the corresponding BIB record.

1. Select the “Search” tab with the binoculars icon.
2. Select “[B] Browse”.
3. Select “OCLC Number (035a) (OCL)” from the drop-down box in the Headings List.
4. Paste the OCLC obtained from the spreadsheet into the “Enter Starting Text” box.
5. Hit the “Go” button or the Enter key to bring up the BIB record(s) associated with that OCLC number. If there are multiple records with the same OCLC number, refer to the documentation for duplicate OCLCs.
6. Select the record with the matching OCLC number. It will highlight in dark blue.
7. Hit the “Catalog” button to open the BIB record.

If there appears to be no BIB record in ALEPH for the OCLC number, the title must be referred to Madison or one of the higher-level FLARE cataloging staff. Put a note on the first item of the title with the OCLC number, a notation of “not in ALEPH” and your name, and put it on the problems cart.

Do not attempt to search in ALEPH by ISSN, title, etc., as this is an unreliable method that could potentially result in HOL records being attached to the wrong BIB or bad record.

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Using 'Find' to Search for Records
If too many record options come up with ‘Browse’ search option, you can use the ‘Find’ search option to limit the records down to the sublibrary holdings they have. This is useful in the case of UF items, when you know that the record should have UF sublibrary holding, or when you are looking for an existing FLARE holding.

To use the ‘Find’ feature, click on the binoculars and then click on the ‘Find’ option. In the Advanced Search option, make sure the first two drop-down bars are for (Title) and (Sublibrary only).

To the right of the drop-down, enter in the title you are looking for and the sublibrary you are looking for.
In this case, ALEPH found two records that matched the search, with the record I was looking for as the second option. IF ALEPH does not open the records automatically, click ‘Show’ to see the records.

Note: You can also search by Date and a lot of other sorting factors, by hopefully this will not be necessary.
Duplicate OCLCs/ISSNs

Sometimes an OCLC number will have multiple BIB records in ALEPH. These instances need to be recorded in the problems spreadsheet in Google Drive. Choose the BIB with the most HOL records and proceed as usual.

Recently we have realized that multiple FLARE holdings have been created on duplicate titles because of there being multiple copies of the same OCLC/ISSN record in ALEPH. Because of this, duplicate material is being processed and then having to be found and removed.

Before processing any material, always search the OCLC number and ISSN in ALEPH to make sure there are no duplicate records out there with FLARE holdings already on them.

To do this, copy the 035 field/022 field from the BIB record and search the OCLC/ISSN number in ALEPH.
The reason you need to search for both is that the OCLC number will bring up only duplicate titles, but sometimes ISSNs are incorrectly placed on completely different titles with different OCLC numbers are will not be found just by the OCLC search.
If only the record you are working on pops up, then proceed as usual.

If more than one record pulls up, select them and click ‘Catalog’ button in the right-hand bar.

If only the record you are working on has or will have a FLARE holding, proceed processing as normal but alert Madison to the duplication so that it can be sorted out and removed.

If there are already duplicate FLARE holdings for the same time, bring it to Tabby or Madison’s attention immediately. We will need to merge the records together and remove any duplicate materials.
Reviewing the BIB record

Once you’ve accessed the BIB record, examine and confirm the data with the physical item.

NEVER EDIT THE BIB RECORD. Do not make any alterations if you find discrepancies or problems. Consult your supervisor.

1. Use the Leader field (LDR) to confirm that the record is a serial record or a monograph record, depending on the items you are processing. A serial will contain the letter “s” in the string of characters, whereas a monograph will contain an “m”.

2. In the ISSN field (022), see if there is a correct ($a) ISSN number. This particular example doesn’t have an ISSN, as with many pre-1970 titles. If there is no ISSN number, proceed without it and make a note for later. For multiple ISSNS or incorrect ISSNS, consult Madison.

3. In the System No. field (035), confirm that the item has an OCLC number.
4. Compare the Main Title (245) field and the Imprint (260) field in ALEPH to the title page of the physical item. Do not trust the spine/cover of the book.

5. Review the Dates of Pub. field (362). The physical items you have must fall within the range listed in this field. Items with the same or very similar titles may not be all on the same record. If the record lacks a 362 field, consult higher-level staff.

6. Check to see if there is a 247 and/or 547 field (former title note) in the BIB. If so, alert a cataloger or Madison to the record so it can be overlaid. A 247/547 field signals a bad record, so it is important that the record is cleaned up. Catal. Source, the 040 field, also needs to be overlaid if it says CARP.

7. Also check to see if a Status (STA) field that says PROVISIONAL is present. If you have a provisional record, stop processing and bring the item to Madison as it is not a complete record and needs to be linked to an OCLC number.

Sometimes, reviewing the 5XX and 7XX notes before moving on to the HOL record can be helpful. Notes in the 5XX might indicate the presence of cumulative indexes (555) and/or supplements (525). They might also note any peculiar or irregular numbering pattern (515). For example, this 515 note here is letting us know something that might have come up when the processor was scanning the items for the run:

<table>
<thead>
<tr>
<th>General Note</th>
<th>500</th>
<th>a</th>
<th>Title from caption. FTaSU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Numbering Note</td>
<td>515</td>
<td>a</td>
<td>Issues also called spring, summer, fall and winter numbers. FTaSU</td>
</tr>
</tbody>
</table>

Other useful fields to watch for include 780 (preceding entry) and 785 (succeeding entry), especially if the physical items at hand fall outside of the publication dates in the 362. The 776 (Additional Physical Form Entry) often lists online or electronic formats of the print title; this field can be helpful when differentiating the print ISSN from the electronic or online ISSN (which should be treated as $y—incorrect).

**Hotkeys in ALEPH**

<table>
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<th>Helpful hotkeys in ALEPH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cut</td>
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<tr>
<td>Copy</td>
</tr>
<tr>
<td>Paste</td>
</tr>
</tbody>
</table>

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Earlier and Later Titles

The HOL record you create needs to fall within the range of items listed in the BIB record. Items with the same or very similar titles may not be all on the same BIB. Consult the Dates of Publication field (362) in the BIB record for exactly which items should be listed in the HOL.

For example, you have v.1(1917)-v.5(1922) of *The Florida buggist*. You use the OCLC number from the spreadsheet to find the BIB number for the first volume. **All consecutive items do not necessarily go on the same BIB.** You review the BIB record and see that it only includes up to v.3:no.4(1920:Mar.).

The name of the serial changed to *Florida entomologist*, prompting the creation of a new BIB record with its own range of items. In serials cataloging, a major title change prompts the creation of a new record.

To locate the record the remaining items should be on, scroll down to the 785 field and search the OCLC number given. If there is no 785 field or the OCLC number has no ALEPH record, place item on the appropriate cart so it can be found and brought it.

ISSNs

The International Standard Serial Number (ISSN) is a standardized identification code for continuing resources/periodical publications/serials. It appears like two sets of four digits separated by a hyphen (e.g., 1234-5678). ISSN assignment is coordinated by a network of national ISSN centers, and every assigned ISSN is registered in an international database called the ISSN Register. Because the ISSN was developed in the early 1970s, many pre-1970 serials lack ISSNs, or have had them retroactively assigned.

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A serial title is assigned a unique ISSN for every format. The print format will have a different ISSN than the microfilm format of the same title, and the CD-ROM format will have a different ISSN than the online format. A title change will also prompt the assignment of a new ISSN.

ISSNs help to identify serials and the various format manifestations a title may take. ISSNs also assist in the linking and retrieval of related records if they are included in the 700 fields on a record. For example, ISSNs help differentiate between earlier and later titles, main title and supplement records, and print and electronic formats. Patrons can also search for titles by the ISSN.

If a title does not have an ISSN, make note of it in the work logger. The database will be checked and the ISSN will be added if one has been assigned. Also make note if the record has numerous ISSNs so that the correct one can be distinguished.

**Reprints**

The collection of books you have in hand may be a reprint of the journal instead of the original printing.

To determine if the items are reprints, turn to the title page. Usually, the bottom of the title page will contain the publisher’s information. If it is the original publisher and publishing date, put the items on the original record. However, if the publisher information mentions reprints and has a somewhat more recent date, then the items may need to be added to a reprint record. Note: Kraus Reprints is the most common reprint publisher for technical and academic journals. If you see this, it is a reprint.

If the entire run of items are reprints, the items will need to be put on the reprint title record, not the original title record. On the reprint record, they do not need further distinguishing. If you have just a few reprints that are filling gaps in an original record, the reprints can stay on this record but need to be notated as such.

To notate that an item is a reprint, first add the published date and word ‘reprint’, like “1966 reprint edition”, in the OPAC note on Tab 3 of the item.
Then, when you are completing your holding statement, you will need to add an additional ‘l’ and ‘z’ field to the ‘completeness reviewed’ 583 stating which volumes are reprints.
If we have a complete reprint run, then we are also leaving a suppressed FLARE holding on the original title’s record so that the originals are not processed if transferred to us. Please bring these to Madison or Tabby’s attention.

**Foreign languages and scripts**

Often, the items will be in a foreign language or script. Complete the holding record in the language that appears on the items and in the language code in the 008 field.

![Fixed Data](image)

Since the record is in Russian, the primary enumeration and months (if needed) should reflect what is on the title page.

If you have Roman numerals, convert to Arabic numerals. If needed, consult a conversion site like [http://www.onlineconversion.com/roman_numerals_advanced.htm](http://www.onlineconversion.com/roman_numerals_advanced.htm).

MCMXXIV → 1924
Edited 11/8/2016
### Foreign language months

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# FLARE Processing Manual

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<td>Julai</td>
<td>juli</td>
<td>lip.</td>
</tr>
<tr>
<td>Nov.</td>
<td>Nov.</td>
<td>nov.</td>
<td>lapkr</td>
<td>Nov.</td>
<td>nov.</td>
<td>listop.</td>
</tr>
<tr>
<td></td>
<td>English (eng)</td>
<td>Portuguese (por)</td>
<td>Romanian (rum)</td>
<td>Russian (rus)</td>
<td>Serbo-Croatian (scr)</td>
<td>Slovak (slo)</td>
</tr>
<tr>
<td>-----</td>
<td>--------------</td>
<td>-----------------</td>
<td>----------------</td>
<td>---------------</td>
<td>---------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>Mar.</td>
<td>março</td>
<td>Mar.</td>
<td>март (мартъ)</td>
<td>март / ožuj.</td>
<td>brez. / mar.</td>
<td></td>
</tr>
<tr>
<td>Apr.</td>
<td>abril</td>
<td>Apr.</td>
<td>апр.</td>
<td>апр. / trav.</td>
<td>dub. / apr.</td>
<td></td>
</tr>
<tr>
<td>May</td>
<td>maio</td>
<td>Mai</td>
<td>май</td>
<td>май / svib.</td>
<td>kvet. / máj</td>
<td></td>
</tr>
<tr>
<td>June</td>
<td>junho</td>
<td>lunie</td>
<td>июнь (юнь)</td>
<td>јуни / lip.</td>
<td>červ. / jún</td>
<td></td>
</tr>
<tr>
<td>July</td>
<td>julho</td>
<td>Iulie</td>
<td>июль (іюль)</td>
<td>јули / srp.</td>
<td>červen. / júl</td>
<td></td>
</tr>
<tr>
<td>Nov.</td>
<td>nov.</td>
<td>Noem.</td>
<td>ноябрь</td>
<td>нов. / stud.</td>
<td>list. / nov.</td>
<td></td>
</tr>
</tbody>
</table>
If a foreign language holding does not display correctly in the public catalog, report this to Madison so it can be noted.
Foreign language punctuation

Foreign languages sometimes use different punctuation and this punctuation should be used when appropriate. While English uses first a comma and then a period to express thousands and decimals, other languages may use a period for the thousand and a comma for the decimal spot.

For example, while we would have 4,300,200,100.00, it would read 4.300.200.100,000 in Italian, Norwegian, and Spanish. In German it would read 4 300 200.100,000, and in French it would read 4 300 200 100,000.

If you come across any foreign language numbering, enter it in as it appears on the title page and as is correct for the language.

Determining the type of items you have

When you pull items from the shelf, you may have to determine whether the items are monographs, monographic series, or serials, or if you have a VHS tape or CDs. The type of items you have determines how you will process them.

Monograph is a fancy library word for book, as it is a single work on a specific subject. Most are single volumes, but some may be in multiple volumes, called “sets”. If a single book is published in several volumes, it is still a monograph as it is meant to be complete on its own. We do keep different editions of monographs, as they are usually not identical.

Monographic series are released in successive volumes, like a serial, but each is structured like a separate book or monograph. It is the fact that they can stand on their own as a separate book within the series that differentiates them between serials. If we choose to treat them as individual titles, they are called analytics instead of monographs.

Serials are scholarly pieces published in successive parts intended to be continued indefinitely. Serials will consist of a run of items.

Photocopies

If you come across photocopied material, we are processing them as normal. They do not require any notes, whether in the OPAC or 500 notes.

How to Process CD’s

When you come across CD’s, first check what record they are on. If they are on the print record with print material, bring them to Tabby or Madison’s attention as they will need to be moved. CD’s should be processed onto electronic resource records.

To find the electronic record, first search the print BIB. It should mention that material was also issued on CD-ROM in the 500 notes and there should be a 776 additional physical formats field with the OCLC number of the CD record.

Edited 11/8/2016
Search the OCLC number and pull up the record.
If you’re moving items to the CD record, you’ll need to create a FLARE holding. Do your pairs/action notes as normal, using the enumeration and chronology on the CDs. You will not need to say they are CDs here because that is made clear by what record they are on.
Your items also do not need to state that they are CDs. This is the same process as for indexes and supplements on index and supplement records.

Once done, if the CDs are locked then bring them to Madison. If they are not, have them be trayed as normal.

**Last Copy Processing Policy**

FLARE will consider a serial or monographic item as a Last Copy item if the item is rare and/if there is only a few copies of it in Florida. To process a Last Copy item, follow the general guidelines for items records and holding records with the following exceptions/additions:

1. In the item record:

• Change the Item Status (IS) to 90 for ‘In-Library Use’

![FLARE Holding Screenshot]

• Make an internal note stating ‘Last Copy’

![FLARE Holding Screenshot]

2. In the FLARE holding, add:

Edited 11/8/2016
• $x$ subfield to the $$852 Location field stating ‘Last Copy – Name of Institution’
  o ‘Last Copy’ should always be spelled out with a capital L and a capital C, just as is shown here.
  o The name of the institution should always be spelled out – do not abbreviate (e.g. Florida International University not FIU).

<table>
<thead>
<tr>
<th>Location</th>
<th>852</th>
<th>a</th>
<th>FLaFAR</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>b</td>
<td></td>
<td>FLARE</td>
</tr>
<tr>
<td></td>
<td>c</td>
<td></td>
<td>TRAY</td>
</tr>
<tr>
<td></td>
<td>x</td>
<td></td>
<td>Last Copy - University of Miami</td>
</tr>
</tbody>
</table>

**Temporary Damaged Last Copy Policy**

If we receive a damaged last copy item, because we enter a ‘90’ in the ‘Item Status’ field, we are unable to add a ‘95’ and mark it officially as damaged. Instead of the ‘95’ status, add an OPAC note stating ‘Damaged’ and leave the ‘Item Status’ field as ‘90’ so that the item, in the catalog, shows both ‘In-Library Use’ and has a note specifying that is it damaged.

Add the item to the damaged fields in the 853, as normal, and place the item in the designated spot for damaged items.

**Duplicate Last Copy Policy**

If there is a duplicate of a last copy sent to us, we will have Team Tray pull the item to verify that it is trayed and verify that it is a duplicate item in good condition, as opposed to a different edition or damaged copy. If the item is actually a duplicate, recycle it. Then:

• Change the Item Status of the existing item to ‘90’ in FLARE
• Go into the FLARE holding and add the ‘x’ subfield to the location field and label it with the school that sent the item as a last copy item.

Note: We are not worried about labeling other editions of the items, since they were not sent as last copies to us.

**Monographic Series**

Edited 11/8/2016
Monographic series are released in successive volumes, like a serial, but each is structured like a separate book or monograph. It is the fact that they can stand on their own as a separate book within the series that differentiates them between serials. They do, however, still go on monograph records, and you want to verify that there is an ‘m’ in the leader field.

**Example 1**

![Leader](image)

Often, the record will also specify how many pieces the monographic series should contain in the physical description field, as it is a set amount of volumes and not continual, like a serials record.

![Physical Des.](image)

When you process the items, use the descriptor present on the items. In this case, the items were labeled v.1 through v.20, with no chronology.

![Items List](image)
In your holding statement, you will include pairs, just like a serials record, and run the monographic series action notes macro, which will allow you to enter in a holding statement.

If you are missing any items or any items are damaged, you would also specify this information in the action notes.

Copy over the 035 OCLC field into the holding. Your holding will not have an 022 ISSN field, as monographs are not periodicals and therefore not assigned ISSNs.

---

**Example 2**

Sometimes you will have a monographic item that also has a supplement or guide with it. This is not technically a monographic series, but we do add pairs and a holding statement to accurately reflect the material we have.

Often the extra material will be mentioned somewhere in the bibliographic record, either in the 300 physical description field or in a 500 field.
Because the bibliographic record calls the monograph item ‘Text’, we use that in the item description and holding. The item itself did not say v.1 or Text, but just the title of the item. The supplement did call itself a supplement.

For the pairs, use (unit) in the ‘a’ subfield of the 853 and list the monographic item as ‘Text’. Continue with supplement pairs, as normal. Then, run the monographic series action notes and copy over the 035 OCLC field into the holding.
HOL Records

Creating a new HOL record

After confirming that the BIB record is OK, create the holding (HOL) record for ICUF items.

1. Select the tab, “4. HOL Records”. All existing holdings will display below.

2. Ensure there’s not an existing FLARE holding on the list. If there is already a FLARE holding, refer to the documentation on adding to an existing holding. There should only ever be one FLARE holding on an ALEPH bib record.

3. If there is not already a FLARE holding, hit “Create” to generate a new holding.

4. This new holding will show at the top of the list. It will be a group of generated numbers rather than a location. Click on it and hit the “Edit” button to open the new HOL.
The newly generated HOL record will already have five fields:

- Leader (LDR)
- Owner (OWN)
- Fixed Data (008)
- Link (LKR)
- Location (852)

The HOL record requires the following actions:

1. Run the Location (852) macro.
2. Addition of the ISSN (022) field, taken from the BIB record if an ISSN is present.
3. Addition of the System No. (035) field, also taken from the BIB record.
4. Creation of 85X/86X pairs, either manually or by macro.
5. Creation of three 583 Action Notes, either manually or by macro.

If you create a holding by mistake, or create more than one, refer to the section on deleting holding records.

Adding field 852

A newly generated HOL will already have a Location (852) field. It needs to be edited/replaced, either by using the macro or manually.

Hit Alt+0 to open the macro box. Select “IlfLocation”. The macro will delete the existing field and create a new Location field with no indicators and three subfields, like such:

<table>
<thead>
<tr>
<th>Location</th>
<th>852</th>
<th>a</th>
<th>FIGaFAR</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>b</td>
<td>FLARE</td>
</tr>
<tr>
<td></td>
<td></td>
<td>c</td>
<td>TRAY</td>
</tr>
</tbody>
</table>

Subfield $a$ is the institution code, subfield $b$ is the collection, and subfield $c$ is the sublibrary. For ALF and SUS items, if the $h$ and $i$ with the call number is already present, it is okay to leave it instead of removing it.

Alternatively, the existing field may be deleted manually by clicking on the field (852) and hitting Ctrl+F5. Hit F6 to create a new field, enter “852” for the field, space across the indicators line (which should be left blank), and add “FIGaFAR” to $a$. Hit F7 to create a new subfield, name the subfield $b$, and add “FLARE”. Hit F7 to create another new subfield, name the subfield $c$, and add “TRAY”. Save the record.

Upon saving, the name of the HOL will change from the ALEPH-generated numbers assigned at record creation to “FLARE TRAY”.

Adding the 022 and 035

The ISSN (022) and the System No. (035) need to be copied from the BIB record and added to the HOL. There is no macro for this function. The easiest way to do this manually is to click on the 022 field in the BIB and copy the whole field using Ctrl+T. Return to the record and paste the field using Alt+T. Repeat with the 035 and save the record.
The 022 field, when clicked on, will display what the subfields mean in the Tag Information tab.

For example, this record has a 022 field with only an $a$ subfield, meaning it is the correct ISSN for the record, and the 035 field right underneath it. In this case you would just bring both over to your FLARE record. Then, save the record.
If the record has an $a$ field and either a $y$ or $z$ field too, just delete the extra field when you copy it over. That information is necessary for the BIB record, but not for our HOL record.
Sometimes when you go to the BIB record there may be multiple 022 fields with either duplicate or false information. If you see this, report the record to Madison for correction.

If there isn’t a 022 field, just copy over the 035 field. Most commonly older records and short records (with a run of only two or three volumes) may not have an ISSN yet, or the record’s ISSN just has not been entered in yet. Note that the record does not have an ISSN when you enter your work into the work logger.

Macros

A macro is a computing function that triggers a sequence of automated actions. Macros are used to cut down on repetitive data entry, to help eliminate error, and to ensure uniformity.

A macro consists of either a series of fully automated commands that require no input from the processor (such as the “FlareLocation” macro), or a series of windows requiring data entry (like the “SerialActionNotes” and “VolumeHoldings” macros).

On a computer with macros enabled (macro path here), the macro box may be opened by hitting Alt+0. Then, select FLARE and you will see the options available for our processing.

You have several macro options:

- **DamagedMono** will run the action notes appropriate for monographs and include a damaged note.
- **FlareLkrLinking** will run a macro to link monographic and series records together.
- **FlareLocation** will run the macro for your 852 field. You will want to run this macro first.
- **MonoActionNotes** will run the macro for your 583 fields appropriate for monographs. This macro should only be run under special circumstances, as when you GF a monograph, they should be entered automatically.
- **MonoSeriesActionNotes** will run the macro for monographic series items, where you need a completion field but not the fields otherwise only relevant to serials.
• SerialActionNotes will run the macro for your 583 fields appropriate for serials. You will be required to enter in the holding information for the record and input any missing or damaged items as prompted.
• VolumeHoldings will run the 853/863 pairs for serials or monographic series.

A few things to remember about the macros:
• The macro will run according to cursor location, so click the cursor to the part of the record where the field needs to go (usually at the end).
• Do not click anywhere while the macro is running.
• After a macro runs, the record is automatically saved, making it unnecessary to save the record manually.

85X/86X pairs

The purpose of the 85X/86X pairs is to indicate available material in the public catalog. The pairs can be thought of as a formula in which you enter in the information and it populates as a holding record in the OPAC. You can check the public catalog for how your holding appears to ensure accuracy.

Before creating the pairs, survey the items at hand to establish what material is present.

Assume the example title has the following items: v.1(1917)-v.3(1920).

Adding 853/863 pairs

The 853/863 pairs establish basic bibliographic units (in other words, standard volumes that aren’t supplements or indexes).

A serials HOL record must have 853/863 pairs.

853s are for the captions. Captions are the variables used before the enumeration to tell you what the number is, such as volumes or tomo. 863s are for the enumeration and chronology. Enumeration is a numbered list while chronology is the timeline in which it occurs.

For 853/863 pairs, run the “SerialVolumesIlf” macro. The macro first alters the Leader (LDR) and Fixed Data (008) fields before introducing a series of windows which require processor input.
Select the abbreviated caption of the primary level of enumeration. Captions are designations like volume, tome, number, part, Band (German for volume), etc. In English titles, volume (abbreviated simply as “v.”) is the most common. For caption abbreviations not listed, select “other” and enter the caption abbreviation in the next window. If you are unsure of what the abbreviation would be, visit the Abbreviations for Captions page.

The caption for this example title is volume, so select “v.” and hit “OK”. There isn't any secondary enumeration (such as numbers or parts), so decline to add another level. There are years on these items, so include chronology. Select the caption for the chronology in the next window. There isn't any secondary chronology (such as months or seasons), so decline to add another level. Inputting data into this series of windows will generate the 853 field.

The next window will ask for the desired 863 link/sequence number value. This value is added in increments of ten. For the first 863, the link/sequence number value should be “10”. Consecutive 863s should be inputted as 20, 30, 40, 50, and so on. (If you hit 1.90, it would then go to 1.100, 1.120, etc.)

The next window will ask for the “863 enumeration value for level 1”. This is the enumeration that corresponds to the enumeration caption (v.) in the 853. Enter ‘1-3’ for the material.
For the chronology value, enter the value that corresponds to the chronology caption [“(year)’] in the 853.

The macro will finish and save the record. The completed pairs should appear as such:

| Capt. Bib.Unit | 853 | 20 | 8 | 1 | a | v. | i | (year) |
| Enum. BibUnit  | 863 | 30 | 8 | 1 | 1.10 | a | i | 1917-1920 |

**Missing items at volume level**

If, for example, v.2(1918/1919) was missing, there would be a gap in the material. For this reason, there will be two 863s instead of one.

After entering in the 853 information, your 863 link number box pops up. Enter in 10 for the first set of material.
Then, enter in all of the material before the gap.

For our example, v.1 is 1917 and 1918 published together by the publisher, so it is typed with a slash.

The next window pertains to the creation of additional 863s. In this example title, there is a gap break, meaning that material that was apparently published appears to be missing.

Since we have a missing item, click on ‘Gap break’ and then ‘OK’.

For the next link/sequence number, enter “20”. Follow the prompts in the subsequent windows for the rest of the material in the title (v.3(1919/1920). Once all material is accounted for, indicate that there are no other 863s that correspond to the 853.

Input that there is not another 853 link/sequence number. For circumstances that would merit more than one 853 field, please refer to the documentation on Enumeration/Chronology Changes.

Edited 11/8/2016
The macro will finish and save the record. The completed pairs should appear as such:

```
Capt. Bib.Unit  853  20  8  1
               a  v. 
               b  i  (year)

Enum. BibUnit  863  30  8  i
               a  1
               b  i  1917/1918
               g  w
               3

Enum. BibUnit  863  30  8  i
               a  1
               b  i  1919/1920

Missing items at issue level
If you are missing items at the issue level, you will need to single out the material missing issues in the 863’s. This method is often referred to as the “Ugly Duckling method”.

```

```
Capt. Bib.Unit  853  20  8  1
               a  v. 
               b  no. 
               i  (year)
               j  (month)

Enum. BibUnit  863  30  8  i
               a  1
               b  i  1900-1909
               g  w  1-9
               10

Enum. BibUnit  863  30  8  i
               a  1
               b  i  1910
               g  w  10
               1-2
               1901-02

Enum. BibUnit  863  30  8  i
               a  1
               b  i  1910
               g  w  4-12
               10
               1911
               04-12
               11-12

Enum. BibUnit  863  30  8  i
               a  1
               b  i  1911-1912
               g  w

Action Note  583  1  i
             3  v.1(1900)- v.10: no.2(1910: Feb.), v.10:no.4(1910: Apr.)- v.12(1912)
```
Since v.10 is missing issues, the material must be separated out so that extraneous information is not given about any of the volumes not missing material. For the “Ugly Duckling,” give the numbers and corresponding months (if the title page states it) for the material before and after the missing issue(s). It is only necessary to separate out the material in the pairs, not in the action notes.

Note: Even though the 863s span multiple issues but only one year, you would enter in the year once (1910) instead of twice (1910-1910).

Gap and Non-Gap Breaks
Gaps and non-gap breaks in the 863 pairs are shown through the subfield $w$ as either ‘g’ for gap or ‘n’ for non-gap.

Only use a gap break when you are positive that material is missing. For example, if you have v.1(1990) and v.3(1992), and the bibliographic record does not say anything about v.2(1991) not being published, then you can put a $w g$ in the pairs to show that v.2 is missing, as well as listing it in the completeness reviewed 583 action note, $z$.

If you have another range of items, v.3(1980)-v.5(1982), and v.3 contains numbers 1-5 but v.4 only contains v.1-4, you would first need to check the bibliographic for the frequency (field 310). Since the BIB says it is irregular, we would not assume that v.4 is missing no.5 and therefore would not put a gap break between v.4 and v.5.
Non-gap breaks will be used even less than gap breaks. Non-gap breaks should only be used when an item was not published and you want to clarify that it is not missing material. You would only know that an item was not published from the bibliographic record and usually from a 500 note.

For example, if you have v.1-4 and v.6-10, and the bibliographic record states that v.5 was not published, you would put a $w n$ in between the two runs, or just list it as complete since nothing is missing.

That is the only time a non-gap break is needed. It is not needed when doing the Ugly-Duckling Method or for changes of enumeration. You would just list the material as it is with no reference to missing or not missing unless there is actual missing material or not published material.

Adding 854/864 pairs for supplements
Adding 854/864 pairs is necessary when material includes supplements. Supplements are extra material included with a title to provide more information. The title page of the supplement item may say ‘supplement’, but sometimes it may say ‘commemorative’, ‘special’, etc.

You can enter in a $z note for the title of the supplement on a case by case basis if it is necessary to distinguish it from something else within the record.

The “SupIndexVolSIf” macro can be used to create supplement pairs.

When you choice the macro, it will prompt you to select whether you are adding a supplement or index.

After choosing supplement, you will select the enumeration and chronology caption, enter in the information, and it will populate the fields just like for the 853/863 pairs. Make sure to include the information for the supplement, not for the item it is attached to, if possible. For example, if it is Suppl. v.4(1990) but is attached to v.5(1991), then the pairs would reflect that v.4(1990), not its location.

In the action notes, the supplements appear with a space, such as ‘Suppl. v.X(XXXX)’ or ‘Suppl. (XXXX)’. In the item descriptions, supplements should appear as: ‘Suppl.:v.X(XXXX)’ or ‘Suppl.:XXXX’.

Edited 11/8/2016
Note: We do list damaged supplements in the damaged action notes, for replacement and lending purposes.

**Maps and Other Named Supplementary Material**

While maps are processed as supplements in the pairs, they are formatted differently in the item description and HOL statement. This is also true of material that is supplementary in nature but has its own name, such as Special Issues and Addendums.

When the material is attached to a regular item, the item description is done similarly to that of a supplement or index, but with the name of the material instead. For example, if you have v.4(1990) and it has maps, your item description would appear as v.4(1990)+Maps. If it is its own item, it would be Map:1990, depending on the available information on the title page. This is also how the items would appear in the HOL.

Supplements can be classified as either part of your items or as supplements. As with an index with item enumeration, a special issue that is v.11(1968) would be counted in your pairs as a regular item, with the item description, pairs, and action notes all just stating v.11(1968).

If the supplement exists in addition to the items, as in it is supplementary to an already existing v.11(1968), then it is processed as a supplement. Its item description would use its title, whether it’s a supplement or special issue, it would have supplement pairs, and be called its title in the action notes. For this example, the material was called Supplement on the title page.
Example 2: Here you have items that range from v.5(1985)-v.20(2000) plus an addendum for v.7(1987) as a separate item. Note that this would all be done the same if the item was attached to a regular item instead.

For your supplement pairs, you will need to add the title Addendum to the ‘a’ subfield for it to generate the correct HOL statement in the UF catalog.
This is the rule for maps, addendums, special issues, and any other named supplementary items. If the suppl. is simply titled supplement, then you don’t need to add it to the ‘a’ subfield as the suppl. pairs do that automatically.

Adding 855/865 pairs for indexes

Indexes are alphabetical lists of the names, subjects, etc. that occur within a given text. Adding 855/865 pairs is necessary when material includes indexes that include material beyond that in a single item, or indexes that are published as individual items. That is, do not mention indexes that are “self-contained” within an item in the pairs or in the item description. Indexes that should be mentioned include cumulative indexes, author indexes, subject indexes, etc., that span multiple items.

UNNECESSARY:
v.1(1972)+Index
v.2(1973)+Index
v.3(1974)+Index
v.4(1975)+Index
v.5(1976)+Index

NECESSARY:
v.1(1972)
v.2(1973)
v.3(1974)
v.4(1975)

In some cases, it may be necessary to refer back to the BIB record for index details.

Edited 11/8/2016
Indexes are entered in the pairs in the same manner as basic bibliographic units. As for the supplements, enter in the information that corresponds to the material the index covers, not the location of the index. If the index covers v.1(1985)-v.25(2010) but is located in v.25(2010), you would enter in v.1/25(1985/2010) in your pairs.

Reminder: Indexes published together use slashes instead of dashes.

The “SuppIndexVolsIlf” macro can be used to create index pairs.

Note: Index fields never have indicators.

Example 1: Here, your index is published as an individual item containing v.1 through 25. Because it is published together, we use a slash to describe it.

Items:
v.1(1985)
v.2(1986)
v.3(1987)...

Example 2: Here, because the index is published in two separate items and not all together, we use a dash to describe it. This would also apply if the indexes were attached to regular items, like v.10(1995)+Index:v.1/10(1985/1995).

Items:
v.1(1985)
v.2(1986)
v.3(1987)...
Edited 11/8/2016
Indexes with enumeration

When you have an index that is also part of the normal run of your items, your item description should show the enumeration and chronology designated for that item and then an OPAC note should specify what material, as an index, it is covering.

For example, in this BIB record, 60(1946) is an index for 1-59. It does not contain new information, just the index, but it is enumerated like another item in the run instead of just as an index.
When you run across this, enter in the item’s enumeration in the item description. Then, add an OPAC note specifying that the item is an index for 1-59(1941-1945).
How you do your pairs will depend on how the material is referred to in the bibliographic record. If the BIB specifies that the volume is an index, then you only list the item in the 853/863 pairs as 60(1946). If it does not specify it, then the item is counted in your 853/863 pairs as 60(1946) and then again as 1-59(1941-1945) in your 855/865 index pairs.

**Ordinals**

In the 85X/86X pairs, a plus sign (+) is used to distinguish ordinal numbers (first, second, third, fourth) from cardinal numbers (one, two, three, four). Sometimes, the plus sign will be followed with the form of the ordinal enumeration (+conf., +v., +Bd., +ed., +año, +congress) or ordinal chronology (+qtr., +trim.), but, if the ordinal has no caption (simply “4th”, etc.), use a lone plus sign.

Both enumeration and chronology can be ordinal, such as the 20th conference or 3rd quarter. Be true to the title page, as always; if the title page says “3rd Volume” rather than “Volume 3”, it must be processed as an ordinal.

**EXAMPLE 1:** Proceedings from the 1st conference in 1980 through the 20th conference in 2000.

| Capt. Bib.Unit | 853 | 30 | 8 | 1 |
| Enum. Bib.Unit | 863 | 30 | a | (year) |
| Action Note | 583 | 1 | 3 | 1st-20th conf.(1980-2000) |

Items: 1st conf.(1980)

2nd conf.(1981)

3rd-4th conf.(1982-1983)

**EXAMPLE 2:** The third quarter of a volume is missing.

Edited 11/8/2016
Foreign language ordinals are treated a little differently.

For the action notes and item records, use a period in place of the foreign language ordinal indicator.

Item: 20.année:no 224(1932:mai)

Ideally, the ordinal indicator of the pairs will display in the public catalog according to the language code on the record (in this case, “fre” for French). Unfortunately, they’ve been displaying in English lately and it’s in the process of being corrected.

Note: Items that have the enumeration in front of the caption but are not ordinals like, for example, 4.8d, cannot use the + sign as it will make it an ordinal. Instead, process the item as a
regular item, Bd.4, in the pairs, as that is more accurate then it reading as an ordinal in the catalog. Do keep it as the title page has it in the item description and action notes.

Action notes

Action notes function to alert other schools to the material held by FLARE.

For monographic series and serials, there are three parts: retention, condition, and completeness. For monographs, there are two: retention and condition. Completeness is not needed here because monographs are one-item records.

Run either the Actionnote macro or the monograph macro depending on the items you have. The Actionnote macro is for serials and monographic series.

When prompted, you will be asked to enter in the $3 field. It is considered a “free text field,” meaning that the formatting style is flexible. The macro will then prompt for the condition and completeness of the holding. If you have no missing or damaged items, click ‘No’. While the macro is running, be sure not to click away.

Formatting action notes

The most common formats you will see are separate: v.1(1900)-v.25(1925), and adjacent: v.1-v.25(1900-1925). Either of these is fine.

While the format is open, some things are important to pay attention to. The use of commas in the action notes is solely to show gaps: v.1(1900)-v.3(1903), v.5(1905)-v.25(1925). If you have a non-gap break, the use of a semicolon tells the viewer that nothing is actually missing: v.1(1900)-v.3(1903); v.5(1905)-v.25(1925).

After entering your $3 field and any missing volumes or damaged items, the macro will complete the fields with the necessary information.

Example 1

Edited 11/8/2016
OR

flagar
a completeness reviewed
20130916
FLARE
ASERL
volume-level validation
FSTO
missing volumes
z missing v.36-40(1954:Dec.-1958:Feb.)

NOT

flagar
a completeness reviewed
20130916
FLARE
ASERL
volume-level validation
FSTO
missing issues
v.36(1954:Dec.)-v40(1958:Feb.)

Example 2

Action Note 503 1 3 ser.1:t.2(1837), ser.1:t.4(1839), ser.1:t.6(1841)-ser.3:t.1(1875); Index ser.1:t.1(1835)-ser.1:t.20(1855)
flagar
a completeness reviewed
20140516
FLARE
ASERL
volume-level validation
FSTO
missing volumes
z missing ser.1:t.3, ser.1:t.5

OR

Action Note 583 1 3 ser.1:t.2(1837), ser.1:t.4(1839), ser.1:t.6(1841)-ser.3:t.1(1875); Index ser.1:t.1-t.20(1835-1855)
flagar
a completeness reviewed
20140516
FLARE
ASERL
volume-level validation
FSTO
missing volumes
z missing ser.1:t.3, ser.1:t.5

Example 3

Edited 11/8/2016
Note: If you are missing material on either end of the holding statement (i.e. v.1:no.1 is missing and your holding statement starts with v.1:no.2), then list v.1:no.1 as missing in the 583 ‘z’ note.

Example:

In the action notes and item records, if the enumeration/chronology caption does not end with a period, insert a space.

v.1:no.3-6(1988) [All captions have periods, so no spaces necessary.]

Bd.5:Heft 6-12(1916) [Heft, commonly seen in German titles, is never abbreviated.]

Edited 11/8/2016
t.16:no 1(1971) [Abbreviated in both French and Portuguese as “no”, sans period.]

1st conf.(1985) [Use a space after ordinal indicators.]

Note: Make sure that for monographs the correct macro is run.

**Adding pairs and action notes manually**

While it is preferred that a macro is used to enter in the pairs and action notes to limit mistakes and insure uniformity, the information can be entered manually if needed.

When the macro for the pairs is first run, it also changes information elsewhere. You will need to change the LDR information first. Click on the field and click Ctrl+F to open the field. Change the four fields to read N, Y, 3, N. Then, open the 008 field and change ‘Completeness (16)’ to 0.

To manually add the pairs:

**85x/86x pairs**

| 853/863 | Enum bibUnit |
| 854/864 | Supplements |
| 855/865 | Indexes |

1. Type F6 to create a new field
   a. Type 853
   b. Type 2 for the first indicator and 0 for the second indicator
   c. Add the following subfields when applicable(type F7 to create new subfield)

   **8 1**
   **a v.**
   **b no.**
   **c pt.**
   **i(year)**
   **j month**

2. Type F6 to create a new field
   a. Type 863
   b. Type 3 for the first indicator and 0 for the second indicator
   c. Add the following subfield8s when applicable(type F7 to create new subfield)
FLARE Processing Manual

8 1.10
a 1-37
i 1929-1966
w g (for true gap)
w n (for non-gap breaks)

*Add a new 863 if gaps exist

8 1.20
a 39-71
i 1969-1999

3. Repeat process to create fields for indexes and supplements

NOTE: for Indexes, leave Indicators blank.

For the action notes, complete fields should look like:

For Monographs:

<table>
<thead>
<tr>
<th>583 committed to retain</th>
<th>First Indicator = 1  Second Indicator = blank</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 flgafar</td>
<td>a committed to retain</td>
</tr>
<tr>
<td>a</td>
<td>c date of entry, YYYYMMDD, e.g. 20130326</td>
</tr>
<tr>
<td>c</td>
<td>d committed to retain permanently</td>
</tr>
<tr>
<td>d</td>
<td>f FLARE</td>
</tr>
<tr>
<td>f</td>
<td>j FSTO</td>
</tr>
<tr>
<td>l</td>
<td></td>
</tr>
</tbody>
</table>

For Monographic Series and Serials:

For 583 condition reviewed:

First Indicator = 1  Second Indicator = blank

5 flgafar
a condition reviewed
c date of entry, YYYYMMDD, e.g. 20130326
d committed to retain permanently
f FLARE
j FSTO
l if the item is damaged to the point that a replacement is needed (pages missing, loose, or torn, obscured text, falling apart, etc.), enter “damaged”

Edited 11/8/2016
<table>
<thead>
<tr>
<th>583 committed to retain</th>
<th>First Indicator = 1  Second Indicator = blank</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 flgafar</td>
<td></td>
</tr>
<tr>
<td>a committed to retain</td>
<td></td>
</tr>
<tr>
<td>c date of entry, YYYYMMDD, e.g. 20130326</td>
<td></td>
</tr>
<tr>
<td>d December 31, 2035</td>
<td></td>
</tr>
<tr>
<td>f FLARE</td>
<td></td>
</tr>
<tr>
<td>f ASERL</td>
<td></td>
</tr>
<tr>
<td>j FSTO</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>583 condition reviewed</th>
<th>First Indicator = 1  Second Indicator = blank</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 flgafar</td>
<td></td>
</tr>
<tr>
<td>a condition reviewed</td>
<td></td>
</tr>
<tr>
<td>c date of entry, YYYYMMDD, e.g. 20130326</td>
<td></td>
</tr>
<tr>
<td>f FLARE</td>
<td></td>
</tr>
<tr>
<td>f ASERL</td>
<td></td>
</tr>
<tr>
<td>j volume-level validation</td>
<td></td>
</tr>
<tr>
<td>l if the item is damaged to the point that a replacement is needed (pages missing, loose, or torn, obscured text, falling apart, etc.), enter “damaged volumes”</td>
<td></td>
</tr>
<tr>
<td>z list damaged volumes</td>
<td></td>
</tr>
<tr>
<td>e.g. damaged v.1(1970)-v.5(1975)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>583 completeness reviewed</th>
<th>First Indicator = 1  Second Indicator = blank</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 flgafar</td>
<td></td>
</tr>
<tr>
<td>a completeness reviewed</td>
<td></td>
</tr>
<tr>
<td>c date of entry, YYYYMMDD, e.g. 20130326</td>
<td></td>
</tr>
<tr>
<td>f FLARE</td>
<td></td>
</tr>
<tr>
<td>f ASERL</td>
<td></td>
</tr>
<tr>
<td>j volume-level validation</td>
<td></td>
</tr>
<tr>
<td>l enter “missing volumes” if any are missing</td>
<td></td>
</tr>
<tr>
<td>z list missing volumes, e.g. missing v.11(1981). Note that if part (an issue or a few pages) of a volume is missing, that volume should be listed as a</td>
<td></td>
</tr>
</tbody>
</table>
Editing an existing FLARE holding record

When opening a BIB record in ALEPH, be sure to review the HOL records attached to it. Sometimes another ILF serials processor has already created a FLARE holdings record for that BIB. In these cases, the existing HOL record is edited instead of creating a new HOL. Open the FLARE holdings record.

- Add and/or modify the existing 85X/86X pairs to reflect both the material currently being processed and the previously processed material.

- Confirm that the link and sequence numbers in $8 of the 86X fields are added and changed appropriately (1.10, 1.20, 1.30, 1.40, and so forth). Ensure they are in sequential order and do not repeat.

- Note gaps with $w, when necessary. If missing material has been added to fill gaps, be sure to remove gap subfields.
• Once the 85X/86X pairs are complete, change $3 of the action notes to reflect **ALL** the material in the pairs. Be sure to change $3 in **ALL** three action notes.

• If there are gaps, $l$ and $z$ need to be added to or modified in the third action note. $l$ is always “missing volumes” for all gap situations. In $z$, note the missing volumes. If gaps have been filled, be sure to remove both the $l$ and $z$ note.

• Try to keep the formatting consistent and cohesive throughout the record.

• Go to the Item Records and add in all of the items you are adding to the record.

**Scattered Holdings**

Sometimes so much material is missing at the issue-level that it’s excessively laborious and time-consuming to create an issue-level holding. In such cases, it may be more appropriate to create a volume-level holding with notations that material is absent at the issue-level.

To determine if scattered holdings is necessary, you will need to do a character count. If your holding is over 1000 characters, then continue with scattered holdings. If it is not, then perform the pairs and holding statement as normal, including all gaps and listing all missing material.

**Example 1**

A serial with monthly frequency has material missing at both the issue-level and the volume-level:

- Volume 1: January, February, April, June, July, September, November, December (1982)
- Volume 2: February, March, April, June, August, October, December (1983)
- Volume 5: January, February, March, July, September, October, December (1986)

Processed at the issue-level, this HOL record would have dozens of 863s noting every single gap between both issues and volumes. Simplified, a volume-level record with a scattered holdings public note ($z$) and a volume-level gap would look like the following:
In the third action note (completeness), $l$ and $z$ should be included if any material is missing. In the event of manual entry rather than macro usage, note that $l$ is always “missing volumes” for missing material, even if all or some of the absent material is issue-level. If material is missing at the issue-level and volume-level, use two separate $z$’s.

Enter the description in the item record at the volume-level. Also add an OPAC note of “missing issues” with the missing material, if it’s not too laborious to determine and note what is absent at the issue-level.

**Description:** v.1(1982)
**OPAC Note:** missing issues Mar., May, Aug., Oct.

**Description:** v.2(1983)
**OPAC Note:** missing issues Jan., May, July, Sept., Nov.

**Description:** v.5(1986)
**OPAC Note:** missing issues Apr., May, June, Aug., Nov.

**Example 2**

Edited 11/8/2016
A serial composed of daily stock market reports with indications of incompleteness:

<table>
<thead>
<tr>
<th>Capt. Bib.Unit</th>
<th>OPAC Note:</th>
<th>missing issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enum. BibUnit</td>
<td>1903-1919</td>
<td>scattered holdings at the issue-level</td>
</tr>
</tbody>
</table>

**Item description:** 1903  
**OPAC Note:** missing issues

In this case, the scope of the material is too great to reasonably determine which daily issues are missing. It’s unnecessary to specify missing material as in Example 1.

**Suppressing holdings**

To suppress a FLARE holding, create an STA field by pressing F6 to create a field and entering in STA, tabbing over twice, and in the subfield $a enter SUPPRESSED. At ILF, for UF items in a UFSCI holding, click F7 and create a $b, entering in FLARE. For UM records in UFSTO ILF HOLs, enter in ILF in $b and change the 852 field to read $a UF $b UFSTO $c UFFLR. Once you save the record it will be suppressed. You will not need to suppress FLARE holdings.

At ALF, UFSTO holdings of various sublibraries are suppressed. You do not need to enter in a $b for them.
Deleting holdings

If an extra holding record is created, or the holding record is created on the wrong title, the holding can be deleted.

If you need to delete the holding, just created, you will first need to run the location macro, as the record cannot be deleted without the location. Then, press F6 to create a field, enter STA, tab over twice, and type in DELETED. Once saved, the holding will be deleted. Although the record will no longer be visible, it will still show up in the back end of the program. To have it permanently deleted, ask Tabby.
Note: If an entire holding has already been created, delete everything but the location, add in the Status field STA, and save.

**Moving holdings and items to a new title**

If a holding appears on the incorrect title, you can move both the holding and its items from the incorrect title to the correct title.

First, open up the title containing the holding record you need to move and the title you want to move it to.
Then, click the Split Editor Mode button in the upper right-hand corner. Populate both sides with each record, and then click the Overview Tree button just to the left of the Split Editor Mode button. This will allow you to view all of the holdings and items for each title.
Note: The FLR50 needs to be present for both titles. If it does not appear, unclick the Overview Tree button and double click on the Items in the bar on the left-hand side of ALEPH for whichever record does not have an FLR50. Once you do that and return to the bib, the FLR50 should be there. Then, again, click Split Editor and Overview Tree to move the holding.

Now, drag the FLR50 from the record with the FLARE holding on it to the FLR50 on the title in which you want to move the FLARE holding. It will ask you if you are sure, and once you click OK, you should receive a Drag and Drop- Status box that confirms that all of your items have moved successfully.
Once you click OK, the FLARE holding and all of its items will be successfully moved over to the correct title.
Editing UF Holdings
Whenever you edit a UF Marston HOL to put in a FLR Part, you also need to update their pairs/866 to reflect the items they still have.

First, open the holding and add the FLR PART by pressing F6 and typing in FLR, tabbing over three times, and typing in PART.

Next, go to the items and note which items still have an open status (3-Day Loan, 2-Hour Loan, etc.) for the HOL number you are editing. You can also see this list in the UF catalog.
## FLARE Processing Manual

### Table of Contents

<table>
<thead>
<tr>
<th>Seq</th>
<th>B-C</th>
<th>Sublibrary</th>
<th>Description</th>
<th>Call number</th>
<th>Collection</th>
<th>Status</th>
<th>Notes</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>6390</td>
<td>31262048220701</td>
<td>UF MARSTON SCIENCE LIBRARY</td>
<td>v.703:no.1/2Z (05:Jan.17)</td>
<td>QC173 .H8B399</td>
<td>Periodicals</td>
<td>3-Day Loan if Bound</td>
<td>90374556</td>
<td></td>
</tr>
</tbody>
</table>

### Periodicals

<table>
<thead>
<tr>
<th>Description</th>
<th>Call Number</th>
<th>Item Status</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>v 705 no 12 (Dec 15)</td>
<td>QC173 .H8B399</td>
<td>3-Day Loan if Bound</td>
<td>Not Checked Out</td>
</tr>
</tbody>
</table>
Use this list to fix the pairs/866 in the holding to only reflect the items they still have, not the items that were sent to FLARE.

Note: All of the holdings may look different from ours and from each other. Do not worry about changing anything else in either the items or the HOL. As long as it shows the items they have correctly, it is fine. We want to change the least amount possible to reflect accuracy, not our standards.

For this example, the holding only have the 853/863 pairs.

As the catalog and items list shows, this holding only has from v.B290(1990)-v.705:no.1/2(2005) now that the FLARE items have been moved over.

The updated pairs should look like:
The pairs now accurately reflect the items, even though it does not reflect our standards. This is okay. Save the bib and check the catalog once more to make sure it reflects correctly the pairs you edited.

### Item records

#### Slashes vs. Dashes

Depending on how the items you are processing were published, you may need to use a slash (/) or a dash (-) when referring to it.

The punctuation type indicates how the item was originally published. A slash is used between volumes or dates when the items were issued together by the publisher in one piece. So “v.1/2” tells us that volumes one and two were originally published together in a single item by the publisher. It is also common for an item to be published over a fiscal year and therefore span two years, which results in a slash used for the dates: v.3(1990/2000), but only if both years appear together on the title page. If v.3 was issued in multiple numbers, no.1 being 1990 and no.6 being 1991, it would still appear as v.3(1990-1991) in the item description. Just because it spans two years does not mean you use slashes. Slashes are used only when the item was published all together, not in issues or parts, regardless of how many years it spans. You do not need to show both years in the HOL statement or pairs if using a dash.

A dash is used when the volumes were originally issued individually, one volume per item, but later bound together in library binding. So “v.1-2” means that volumes one and two used to be two separate items that were later combined. Don’t go by if a hyphen or a slash is used on the
spine of the item; the item itself must be examined. How you type it here is how it will display in the public catalog.

Example 1: You have three items, v.1(1990/1991), v.2(1991/1992), and v.3(1992/1993). When a volume spans two years on the title page, it is necessary to show both of those years in your condensed HOL statement.

Example 2: You have a run of items, all individually published, and some span over multiple years.

This same rule applies for indexes published together, as seen here.

**Creating item records**
If you are working with ICUF items, like the University of Miami items, that do not currently exist in ALEPH, you will need to create item records from scratch. First, access the items by double-clicking 'Items' under the FLR-50 tab.

Once in the item records, click on the ‘New’ button in the right-hand tool bar. An empty record will open.
## FLARE Processing Manual

### Item List

<table>
<thead>
<tr>
<th>Seq.</th>
<th>B-C</th>
<th>Sublibrary</th>
<th>Description</th>
<th>Call number</th>
<th>Collection</th>
<th>Status</th>
<th>Notes</th>
<th>Loans</th>
</tr>
</thead>
</table>

- **Barcode**: xxx
- **Sublibrary**: B
- **Call number**: B
- **Collection**: B
- **Copy Number**: B
- **Material Type**: B
- **Hold**: B
- **NewItemLinkingNumber**: B
- **NewItemCallNo**: B
- **2ndNewItemCallNo**: B
- **Description**: B

---

**Sort Options:**

- Item
- Del/Ins
- Dept.
- Label
- Global Change
- Item Change
- Completion
- Status
- Add/Item

---

**Temporary Location**

---

**Edited 11/8/2016**

---

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Enter in the Sublibrary, Collection, Material Type, Item Status and Item Process Status first. Unless you have damaged items, this information will be the same for all items you create.

ALF
For items already in the UF library system, you do not need to create an item record. You will instead alter the record that is already there and send it to FLARE.

While logged into FLARE, go to the items list.

Item by item, check the item records for the correct formatting.
Here, the item description and Enum.Level.1 (A) is correct as the enumeration is chronology. The Material Type field says ‘Book’ and therefore needs to be changed to ‘Issue’ as this is a serials record. Only monograph records should have a Material Type of ‘Book’.

Check that there is a barcode and that it is whole. Then, uncheck the Temporary Location box if it is checked and enter ‘GF’ in the Item Process Status.

When you ‘GF’ an item, you are sending it to FLARE. A program runs every night that picks up any items marked ‘GF’ and transfers them over to FLARE along with the holding record it is attached to. If the record already has a FLARE holding on it, it will not create a new one or edit the existing one. That is why it is important to edit any existing FLARE holding to include the material you are sending to FLARE.

This is also why it is important that all of the items you are sending to FLARE are on the same holding record because if not, the program will just pick one of the holdings to copy and may not accurately reflect all of the items that have been sent.
Once you have corrected all of the items and entered in ‘GF’, their Statuses will all read “Going to FLARE.”

Always remember to check back the next day to make sure the items and holding record transferred over correctly. You will have to login between UF and FLARE to do this.
Formatting the item description

Format the item description in the same manner as your holding record. If the item you are entering has an enumeration of v.7 and a chronology of 1976, then the description should appear as: v.7(1976). Enter 7 in the Enum.Level.1 (A)(Vol.) field and 1976 in the Chron. Level.1 field.

Adding primary enumeration (or chronology, if there is no enumeration) to the Enum. Level.1 in the item record is mandatory. Adding chronology to the Chron. Level.1 field is also required when present on the title page. When present, input Enum. Level.2 field and Chron. Level.2 field would also get information for the correct sorting of the items. These fields are preferably numerical-only; use number codes for months and seasons.

While the primary function of these fields is to ensure the item records sort properly, try to keep it as true to the actual enumeration as possible. Only deviate from the actual enumeration/chronology in the rare case when it causes the record to sort incorrectly, such as if the winter (24) issue was published before the spring (21) issue.
Then, scan in the item’s barcode and it will save the record. Always double check to make sure that the barcode scanned fully. Oftentimes, the barcode will only scan the first few numbers but it will save the record like you have scanned the entire thing. Incomplete barcodes are time consuming to fix down the line, so check every single one after you scan it.

As you continue to make changes, click the ‘Update’ button in the tool bar on the right-hand side to save the item record.

As stated in the holding formatting guidelines, slashed and hyphens mean different things. For a full explanation of when either should be used, refer back to adding 853/863 pairs documentation.

In the item records, it is unnecessary to cite indexes if they are “self-contained” within the volume. If an item contains an index for material in other items, cite that index.

**UNNECESSARY:**
- v.1(1972)+Index
- v.2(1973)+Index
- v.3(1974)+Index
- v.4(1975)+Index
- v.5(1976)+Index

**NECESSARY:**
- v.1(1972)
- v.2(1973)
- v.3(1974)
- v.4(1975)
The information entered in Tab 1 will auto-populate into the corresponding field in Tab 4.

Enter the date you processed the item in the Arrival Date field and save. Tab over to Serial Levels, and enter in the Chron. Level.1 and, if any, Chron. Level.2 information.

Save the record and it is complete.

Note: With enumeration in item records, while consistency is preferred, you do not have to add extraneous secondary enumeration just because the previous processor did. If only a few previous items have extraneous information, fix them to match the items you are adding. If a lot of items need to be modified, bring it to Tabby or Madison for a case by case decision on whether or not it is necessary to take the time to change them all.

Edited 11/8/2016
Formatting Item Descriptions, Pairs, and Holdings with Day Chronology

When you have a magazine or journal that is published more than once a month, it may be necessary to show the chronology down to the day. You may need to only do this in the item descriptions and then show the volumes as complete in the pairs and holding, or you may need to show the days in all three areas.

In the item description, for chronology, first list the year, then month, and then the day of the publication. If you abbreviate the month, like Apr., then you can add the day without a space, but if the month does not have an abbreviation, like May, then add a space before the day.

In the pairs, list the days in the chronology ‘k’ field. The word day would also be in parenthesis, like year and month, in the 853.

In your holding statement, if your volumes are complete, the volume would appear as complete, i.e. v.74(2016). If your volume is not complete and it needs to be spelled out, format it the same way you did in the item description.

Missing items at issue-level
If your item has missing material, you will have to include that information in the item record. Do NOT use any variation if “inc.” in the description of the item record. The item description

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should simply list the item [v.2(1986)], while the OPAC note should state what is missing [missing no.4:July] in Tab 2.

Now, the item will have a red check next to it informing other processors to check the note. The note will also appear in the public catalog for patrons to see what material is missing.
Barcode on the back of the book

Every item requires a barcode on the upper right-hand corner of the back cover. If the barcode is inside of the item, it must be duplicated, printed, and applied to the upper right-hand corner of the back cover.

Open ZebraDesigner using the icon on your desktop. When you first open it, you will need to open the FLARE_template.

After you load it the first time, it will automatically appear for future use and you will just click ‘Finish’. To load it, click ‘Open other existing label’ and locate the template within the ALEPH Processing folder.

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Open it and the template will appear. You will need to click on ‘Print’ for the data to be input. Scan the barcode, check ‘Clear values after print’, and print the barcode.
Clicking ‘Clear values after print’ will leave it ready for the next barcode to be scanned.

Moving items without moving the holding

If you are working within a record and notice that some of the items are on the wrong record because of dates of publication confusion or something else, it is possible to move just the items from one record to another.

After you have found the correct title, create a FLARE holding, as most often the correct record will not already have one. If the title already has a FLARE holding, be sure to update it to reflect the new items.

Once the record has a holding, leave it open and open up the record that currently contains the items. Click Split Editor Mode, the icon in the upper right-hand corner of ALEPH that looks like an open book.

Note: If the second window is blank, click on the title in Edit Records that did not appear and it will open.

Click on the icon to the left of the Split Editor Mode, called Overview Tree.
It will display the holding and item trees for both records. You will have to click the plus sign next to the FLARE holding to display the items.

Note: As seen above, the record you are currently working within is highlighted in red.

For this example, the items from the left record will be moved to the right record.
Drag the item into the FLARE record on the correct title. When you go to drop the item, ALEPH will ask you if you are sure you want to MOVE tree item. Click yes and a successful status box should pop up.

As long as the item is dragged directly into the FLARE record on the correct title, it will automatically be linked to the record.

Now the item has been successfully moved from the wrong title to the correct title.

Make sure to either update or empty and delete the holding on the wrong title and then ensure the new holding record is complete.

Note: If there are a lot of items on the record you are moving items from and you are only moving a few, to a succeeding entry for example, you can unlink the items. The items will then be found in the FLR50 folder under Items and can then be dragged into the correct FLARE folder directly.

To unlink the items quickly, you can Bind/Changes to unlink the items you are moving. To unlink, just enter in a bunch of 0000’s in the HOL field changes section. If you bind/changes an item on the holding you want to move stuff to, you can copy the holding number there.

Moving Items between Holdings on the Same Record
If you are moving items between two FLARE HOL’s on the same record, you can Bind/Changes to change the HOL number to the same one for all of the items.

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In the items, click on Bind/Changes.

Select all of the items you need to move, and push the right arrow to move them into the right-hand box.

Click ‘Changes’ and enter in the holding number you want all of the items to be on. Then click ‘OK’.
Trying to Move an Item Attached to an Order

When you try to move an item from one record to another, you may be stopped with an error stating that the “Item is connected to an Order” with an order number listed.
When this happens, open up the items list where the item is currently located. Click on the item and open the General Information (2) tab. At the bottom of that tab there is an Order Number box and in there you should see the order number it recited to you. Delete it and update the item record.

You should be able to move the item now with no issues.
More items on the record than you physically have

ALF
If there are more items on the record than you have with you, you will need to create a separate holding for the items we have to separate them from the other items that may still be circulating at the university.

- Logged into UF and create another UFSCI GEN holding.
- Using the items that you have, edit the record to reflect what is being sent to FLARE.
- Going back to the original UFSCI GEN holding, remove the items that you have so that only the items you do not have are reflected here.
- In the items, unlink the items that you have, relinking them to their new holding.
- Proceed with changing their Item Process Status to GF.
- Save.
- Now the program will pick up and suppress the UFSCI GEN holding you created with the correct items attached to it and will not suppress the record with items that may still be circulating.

**Marston**

If you do not have all of the items on the FLARE holding, first search the general shelf section again for the other items. If you cannot find them, add the following FLR field to the FLARE holding record: FLR $$a PART.

**How to Change Multiple Item Process Statuses at Once**

With the Bind/Changes feature in ALEPH, we can perform a function on multiple items instead of having to go item by item. For example, if you need to suppress a few items, you can use the Bind/Changes function to do it all at once instead of one-by-one.

First, click the ‘Bind/Changes’ button in the right-hand menu. A list of all of the items will appear.
Select all of the items that you want to suppress in the left-hand box, and click the arrow pointing right to move them into the right-hand box. Click the ‘Changes’ button.

The ‘Global Changes’ window will open, and you will only enter in what you want to change in the right-hand ‘Change to:’ menu.
To suppress the items, enter ‘SP’ into the ‘Item Process Status’ and click ‘OK’. A prompt will ask if you are sure you want to execute the changes. Click ‘Yes’.

All of the items selected should now have an ‘Item Process Status’ of Suppressed. You can change them back, either manually or globally, if you need to.

**How to Bind Several Items into One with One Barcode**

When you have items that, for example, are v.4: no.1, 2, 3, and 4 but are all separated with their own individual barcodes, you can choose to bind them together under one barcode and then have them shrink-wrapped together as a single item.
Before you start, copy the barcode from the last item that is being bound together. You will need to paste it later when you are making the changes. Because of this, you’ll also need to remove it from the item that currently has it, because it will see it as a duplicate barcode when you go to update and will not let you proceed. Here, I used 31262073749797 and deleted half of it from the item that currently has it so that I can use it.

First, click the ‘Blind/Changes’ button in the right-hand menu.

A list of all of the items will appear. Select the items you wish to bind together and click the right-pointing arrow to move them into the right-hand box.

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Click ‘Bind’ and the expanded item box will appear.

Here, enter in the item description for the whole item, which would be v.4(1990) after the items are bound together. Also enter in the barcode you are keeping, and fill out the rest of the information as you normally would when processing an item.

When you click ‘Update’ the screen returns to the complete list of items.

Add an internal note specifying the amount of items that are now bound as one item, like we do for maps or other extra pieces. For example, if you bound together 4 items, add an internal note that states ‘4 items’. This assists the request retrieval team in knowing how many items to expect back from the patrons.
Note: We no longer list bound with items as damaged or place them with the damaged or shrink-wrapped items unless they actually are damaged. If you come across one listed as damaged in the action notes with a ‘95’ damage code, leave it as the item is already trayed as damaged.

The rest of the items and barcodes have been deleted and only the single, complete item remains.

With your physical items, black-out the other barcodes leaving only the last item’s barcode visible and place the item on the shrink-wrap shelf.

**Split Items**
Sometimes material from two different BIB records has been bound together into a single item. In these cases, notes need to be left.

First, consult the Dates of Pub. field (362) in the earlier BIB record for the exact start and end dates for that particular title. In this example, v.42:no.6(1971:June) is the final issue of the title. However, v.42 has twelve issues (no.1-12) that were bound together. The title changed from *Amateur athlete* to *Amateur athlete newsletter* halfway through the volume, prompting the creation of a new, separate record.

First, GF the item on the record it exists on. The next day, edit the HOL record and 85X/86X pairs for only the material on that is meant to be on that record, creating a separate 863 for the split material since you will need to specify the secondary enumeration and chronology.

For the item’s record, the split item may be added to either record, but it can’t be added to both records. Since the item is on this record, no notes are need in the HOL record.
For the item description in the second tab, list the entirety of the material in that item. In the third tab, add an OPAC note specifying the portion of the item that is part of the other title. For instance, “no. 7-12 is a later title”.

The OPAC note in the item record will appear in the UF public catalog.

Now, open the later title/succeeding entry and review the 362 to make sure it picks up where the last record ended.

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If the split item in the only material on that record, then you will need to create a FLARE HOL manually. If other items were GF’ed the previous day, just edit the existing FLARE HOL. Add 85X/86X pairs for the items on this record, including the split material that is on the previous record. Add a $z note (public notes that will appear in the UF catalog) at the end of the 86X field where the item splits to specify the portion of the item that is on the current title but bound along with the earlier title.

The note in the pairs will appear in the UF public catalog and alert patrons that the item is with the previous title.

If you have more than just the split item on the holding, make sure your $z note is after the split material so it will appear next to the correct information in the public catalog.
Note: When processing material that contains two different titles bound together (not preceding/succeeding but two completely different titles), treat the item as a split item and leave OCLC numbers for reference as an OPAC note.

**Damaged items**

**Policies**
Damage in print material can take a number of forms, from mold to insect damage. When an item is damaged to the extent that a replacement is desired, it should be processed as damaged.

*If a replacement is desired for whatever reason, the material should be treated as damaged.*

Conditions to consider when assessing material for damage:

- The item is falling apart (the cover is coming off or chunks of pages are falling out)
- The item is disintegrating/deteriorated
- The text is obscured or the information is illegible in any way

When a replacement item is desired, this information must be recorded in ALEPH so that FLARE partners are aware of the desired replacement material. In addition, shrink wrapping is necessary to prevent further deterioration and loss/separation of non-replaced material, as well as to condense items.

We do list damaged supplement items as damaged.

If a damaged item is really thin, as in only a few pages wide, put it in an envelope instead of tying it with string and shrink-wrapping it. Envelopes are available in three sizes.

Note: Items comprised of unbound loose issues (such as those in boxes or tied together with string) are no longer considered damaged. If we happen to get a bound item back that was labeled as damaged but is not really, change the ‘95 Damaged’ status back to ‘03 Regular Loan’ and also remove it from the damaged list in the holding.

**Procedures**

**HOL record**

Process the damaged material as usual, including it in the 85X/86X pairs. In the condition reviewed S83 Action Note, $l and $z should be included if anything is damaged. In the event of manual entry rather than macro usage, note that $l is always “damaged”. When specifying what is damaged in $z, include the entirety of the material in that damaged item, even if the entire item isn’t damaged, as the entire item will need to be replaced. Do not specify the type of damage.

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For example, assume the March and April issues of v.2(1983) have page chunks falling out:

```
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>5</td>
<td>flgafar</td>
</tr>
<tr>
<td></td>
<td>a</td>
<td>condition reviewed</td>
</tr>
<tr>
<td></td>
<td>c</td>
<td>20140303</td>
</tr>
<tr>
<td></td>
<td>f</td>
<td>FLARE</td>
</tr>
<tr>
<td></td>
<td>f</td>
<td>ASERL</td>
</tr>
<tr>
<td></td>
<td>i</td>
<td>volume-level validation</td>
</tr>
<tr>
<td></td>
<td>j</td>
<td>FSTO</td>
</tr>
<tr>
<td></td>
<td>l</td>
<td>damaged</td>
</tr>
<tr>
<td></td>
<td>z</td>
<td>damaged v.2(1983)</td>
</tr>
</tbody>
</table>
```

**Item record**

If damage is included in the 583 action note, then the status must also be changed in the item record, and vice versa. When creating an item record for an item with damage, select Item Status 95 (“Damaged – request new copy”), instead of the usual 03 (“Regular Loan”).

```
<table>
<thead>
<tr>
<th>Item Status:</th>
<th>95</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Process Status:</td>
<td>FL</td>
</tr>
</tbody>
</table>
```

Damaged items should be placed in the designated location for traying.

**Damaged Item Availability**

Damaged items are available for request on a case-by-case basis. Electronic delivery of the requested material is FLARE’s preference, and can be done for requested issues or entire journals.

If the physical item is needed, it will be sent to the University of Florida Libraries’ Conservation and Preservation department and analyzed to determine if it is possible for the item to circulate to another library or not.

**Re-shelving**

Damaged items should be placed in the designated location for traying.

**Inventory**

Damaged items are entered into the inventory database under customer code DET.

**Shrink-wrapping**

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Certain items need to be set aside for shrink wrapping, such as:

- Badly damaged items, such as items with detached covers
- Deteriorated items that are too fragile to tray in their current condition

Process these items as usual, and treat them as damaged.

Once processed, do not return the items to the stacks. Place them on the shelf designated for items in need of shrink wrapping. Note that the barcode sticker will still be scannable through the shrink wrap. Once the item is shrink wrapped, it should be sent to the designated area for traying.

**Loose Issues**

Items comprised of unbound loose issues (such as those in boxes or tied together with string).

To process loose issues, first condense all of the loose issues down into one barcode following the directions [here](#). Next, add a circulation note stating how many pieces the now bound item contains. This is necessary for lending the item and ensures we receive back all of the pieces.

**Enumeration/chronology**

**Determining correct enumeration/chronology**

Do not trust the spine when determining appropriate enumeration.

Most of the titles being processed at ILF have been bound in library binding. Library binding is the method of binding serials for use within libraries, typically done by a commercial library...
binding company. Unfortunately, the spine created by the library binders is often not an accurate representation of the contents. For this reason, the title page is the preferable point of reference for determining proper enumeration.

When library binders split volumes between items, sometimes the items are designated on the spine as parts. Unless the material was actually published as parts and indicated as such on the title pages, do not use parts as enumeration. Frequently, the spine will list volumes and parts as enumeration when the true enumeration (per the title pages) is really volumes and numbers.

<table>
<thead>
<tr>
<th>Spine</th>
<th>Actual Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>v.1:pt.1(1931)</td>
<td>v.1:no.1-4(1931)</td>
</tr>
<tr>
<td>v.1:pt.2(1931)</td>
<td>v.1:no.5-8(1931)</td>
</tr>
<tr>
<td>v.1:pt.3(1931)</td>
<td>v.1:no.9-12(1931)</td>
</tr>
<tr>
<td>v.2:pt.1(1932)</td>
<td>v.2:no.1-6(1932)</td>
</tr>
<tr>
<td>v.2:pt.2(1932)</td>
<td>v.2:no.7-12(1932)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Spine</th>
<th>Actual Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>t.7:pt.1(1887)</td>
<td>t.7(1887:Jan.-June)</td>
</tr>
<tr>
<td>t.7:pt.2(1887)</td>
<td>t.7(1887:July-Dec.)</td>
</tr>
<tr>
<td>t.8:pt.1(1888)</td>
<td>t.8(1888:Jan.-Apr.)</td>
</tr>
<tr>
<td>t.8:pt.2(1888)</td>
<td>t.8(1888:May-Aug.)</td>
</tr>
<tr>
<td>t.8:pt.3(1888)</td>
<td>t.8(1888:Sept.-Dec.)</td>
</tr>
</tbody>
</table>

For example, if a scholar needed v.2:no.6(1932) or t.8(1888:Apr.) for his dissertation, he would know exactly which item to request, as the specific contents are much clearer and true to the way the material was published.

Also, the spines might not abide by our formatting standards. HOL records and items records should follow our formatting standards, not be formatted according to the spine.

<table>
<thead>
<tr>
<th>Spine Formatting</th>
<th>Proper Formatting</th>
</tr>
</thead>
<tbody>
<tr>
<td>t.9(1954-55)</td>
<td>t.9(1954-1955)</td>
</tr>
<tr>
<td>v.1:nos.6-9(1830)</td>
<td>v.1:no.6-9(1830)</td>
</tr>
<tr>
<td>v.24(1936:Jan-Feb)</td>
<td>v.24(1936:Jan.-Feb.)</td>
</tr>
</tbody>
</table>
Sometimes the spines printed by the library binders have translated the enumerations of foreign language publications into English. Again, the enumerations on the title pages should be used. If the date is not on the title page, do not use it.

<table>
<thead>
<tr>
<th>Spine</th>
<th>Title Page</th>
<th>Language</th>
<th>Proper Formatting</th>
</tr>
</thead>
<tbody>
<tr>
<td>v. 65, no. 2, 1972</td>
<td>Tome LXV, Fascicule II, MCMLXXII</td>
<td>French</td>
<td>t.65:fasc.2(1972)</td>
</tr>
<tr>
<td>v.7, no. 3, 1902</td>
<td>Band 7, Heft 3, 1902</td>
<td>German</td>
<td>Bd.7,Heft 3(1902)</td>
</tr>
<tr>
<td>vol. 1, no. 3, 1905</td>
<td>Tomo 1, Número 3, 1905</td>
<td>Spanish</td>
<td>t.1:no.3(1905)</td>
</tr>
</tbody>
</table>

| number, -s | no. |
| numer       | num. |
| numer (Albanian) | nr. |
| numer (Yiddish) | num. |
| numeris     | num. |
| numero (Finnish) | n:o |
| numéro (French) | no |
| numero (Italian) | n. |
| número (Spanish) | no. |
| numers      | num. |
| Nummer      | Nr. |
| nummer      | nr. |
| numurs      | num. |

<p>| tom          | t. |
| tomas        | t. |
| tome         | t. |
| tomo         | t. |
| tomos (Greek) | t. |
| tomul        | t. |
| tomus        | t. |</p>
<table>
<thead>
<tr>
<th>fascicle</th>
<th>fasc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>fascicolo</td>
<td>fasc.</td>
</tr>
<tr>
<td>fascicule</td>
<td>fasc.</td>
</tr>
<tr>
<td>fasciculo</td>
<td>fasc.</td>
</tr>
</tbody>
</table>

For more caption abbreviations, visit [http://guides.uflib.ufl.edu/captions](http://guides.uflib.ufl.edu/captions).
Secondary Enumeration/Chronology

Secondary enumeration/chronology (such as numbers of a volume or months of a year) should only be cited in the HOL record when material at the secondary level is missing. If everything at the volume level is complete, don’t bother with secondary enumeration or chronology.

When, for whatever reason, secondary enumeration/chronology is necessary and both secondary enumeration (such as number) and secondary chronology (such as month) are present on the title page, include both. Do not just add the number or just add the months when both are present. Also, if possible, only cite the missing materials number and months.

EXAMPLE: In this quarterly journal, volumes 7 through 9 are complete, volume 10 is missing the fourth issue, and volumes 11 through 14 are complete. Since volume 10 is the only volume missing material at the secondary level, it is only necessary to cite the issue numbers ($b$) and month ($j$) on volume 10.

Note the $w n$ between 1.10 and 1.20 is necessary to section out v.10 but clarify that the gap is not between v.9 and v.10: no. 1.

EXAMPLE 2: In this monthly journal, volumes 72-80 have numbers (1 through 12) and months (January through December) listed on the title page, but nothing is missing. It’s not necessary to note numbers and months in the pairs because everything is present.
Cite secondary enumeration/chronology in the item record description only when 1) uniqueness needs to be established, such as a single volume split between items, and/or 2) secondary material is missing.

EXAMPLE 1

v.1(1956)
v.2(1956)
v.3(1957)
v.4(1957)

NOT

v.1(1956:Jan.-June)
v.2(1956:July-Dec.)
v.3(1957:Jan.-June)
v.4(1957:July-Dec.)

EXAMPLE 2

Bd.1:Heft 1-3(1972)
Bd.1:Heft 4-6(1972)
Bd.2(1973)
Bd.3(1974)

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Enumeration/Chronology Changes

Enumeration and chronology changes usually show up in the form of a language change, a new series, primary level changes, etc.

Multiple 853s are necessary in the pairs, and the $3$ of the 583 action notes should also reflect the changes. Use semicolons, if there are no gaps, to differentiate between the changes and make it clear where the change occurs.

Note: Item records need to reflect the enumeration/chronology on their respective title pages, not stay consistent with the previous item records.

EXAMPLE 1: The primary level of enumeration added the level new series. A new series indicates a major upheaval in the journal’s life, usually accompanied by renumbering the series as if it were new.
A non-gap break is necessary here because v.12 is 1952 and new ser.:v.1 is 1957. There was nothing published between 1953 and 1956, and the non-gap break makes that clear. In the action note, the entirety of the first caption enumeration is listed, followed by a semi-colon (showing a non-gap break), followed by the new entirety of the new enumeration.

Sample Items:
v.10(1950)
v.11(1951)
v.12(1952)
new ser.:v.1(1957)
new ser.:v.2(1958)
new ser.:v.3(1959)

EXAMPLE 2: The primary level of enumeration changes three times.

We do not need a non-gap break between the first two enumeration changes because the years are continuous, but we do have one between the second and third because the years are not and we have gathered from the bibliographic record that nothing was published in 1974.

Sample Items:
39.année(1950)
t.40(1951)- t.62(1973)
nouv.sér.:v.1(1975)
EXAMPLE 4: The secondary enumeration changes from English to German and then back to English during its run.

This example demonstrates two issues. First, it shows how to correctly separate three changes in enumeration. Then, it shows how to do your pairs when the enumeration goes from English, to German, and then back to English. When this happens, you need three 853s, even though the first and third look identical, because otherwise it will not display properly in OCLC.

Items:
new ser.:v.1-2(1951-1953)  
new ser.:v.31-32(1991-1992)

EXAMPLE 5: This singular item used the Greek alphabet letters as the understood primary enumeration instead of v. and then changes to v. as a secondary enumeration, as well as dropping the date.
Items:
alpha-epsilon

Seasonal chronology

<table>
<thead>
<tr>
<th>85X/86X Pairs ($j)</th>
<th>Action Notes</th>
<th>Items Records</th>
</tr>
</thead>
<tbody>
<tr>
<td>21</td>
<td>spring</td>
<td>Spr.</td>
</tr>
<tr>
<td>22</td>
<td>summer</td>
<td>Sum.</td>
</tr>
<tr>
<td>23</td>
<td>fall/autumn</td>
<td>Fall/Aut.</td>
</tr>
<tr>
<td>24</td>
<td>winter</td>
<td>Win.</td>
</tr>
</tbody>
</table>

In the 85X/86X pairs, use the appropriate numerical codes for seasons. When entering chronological codes for seasons in the pairs, use $j (second level of chronology).

In the action notes, seasons are not abbreviated or capitalized.

In the items records, use seasons abbreviations with the first letter capitalized.

v.1(1972:Spr.)
v.1(1972Sum.)
v.1(1972:Fall)
v.1(1972:Win.)
v.2(1973:Spr.)

Non-captioned enumeration

Sometimes enumeration is “floating” on the title page without a caption (such as v., no., pt.). This non-captioned enumeration typically takes the form of a letter or number. For primary enumeration, list $a in the 853 as “(unit)”, whether the enumeration is a letter or a number. For

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the secondary enumeration, list $b$ in the 853 as “(unit)” also for numbers or letters. The parentheses indicate that the caption is assumed, and will not display in the public catalog.

<table>
<thead>
<tr>
<th>Capt. Bib.Unit</th>
<th>853 00 8 1 a (unit)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enum. BibUnit</td>
<td>863 30 8 1.10 a 8-12</td>
</tr>
<tr>
<td>Action Note</td>
<td>583 1 3 8-12</td>
</tr>
</tbody>
</table>

If the enumeration changes from non-captioned to captioned, enter in a second 853 to distinguish between the changes.

<table>
<thead>
<tr>
<th>Capt. Bib.Unit</th>
<th>853 00 8 1 a (unit)</th>
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<td>863 30 8 1.10 a 8-12</td>
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<td>853 00 8 2 a no.</td>
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<tr>
<td>Enum. BibUnit</td>
<td>863 30 8 2.10 a 13-15</td>
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<tr>
<td>Action Note</td>
<td>583 1 3 8-12; no.13-no.15</td>
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</tbody>
</table>
Alternative Enumeration

Alternative enumeration occurs when enumeration is not primary or secondary, etc. but instead also called by some other enumeration. This is expressed by an equal sign between the two enumeration options.

Note: Only include the alternative enumeration if it is consistent with all of the issues you have.

EXAMPLE: The primary and secondary enumeration, ser.4:v.1, equals, meaning it is also called, no.151. The number is not a third enumeration but instead an alternative enumeration for the item. Use g as a subfield as it stands for alternative numbering scheme.

| Capt. Bib.Unit | 853 20 8 1 | a ser. b v. no. g 1.10 a 4 b 1 g 151 |
| Enum. BibUnit  | 863 30 8   | a |
| Action Note    | 583 1 3   | ser.4:v.1=no.151 |

Items:
ser.4:v.1=no.151

Chronology as Enumeration

You may encounter items that’s enumeration are only years or years with seasons or months as a second chronology. In this case, the chronology becomes the primary enumeration and takes the subfield $a.

| Capt. Bib.Unit | 853 20 8 1 | (year) |
| Enum. BibUnit  | 863 30 8 a | 1.10 1996-2008 |
| Action Note    | 583 1 3 a | 1996-2008 |

If you have gaps and need to include the secondary chronology of months or seasons, then enter it into the $b subfield instead of the usual $j because it is now acting as the secondary enumeration in your holding.

Edited 11/8/2016
Non-chronological numbering or dates

If you come across a record that has non-chronological enumeration, how you process it will depend on the individual record.


Since the enumeration of this title is not in chronological order, you have to decide how to do the pairs. The first step would be to go back to the bib record. Check to make sure that there is a 500 note disclosing that the items are issued out of chronological order. Then, check other 500 notes or the 362 to see how previous catalogers have referred to the items, by number or by year. In this case, it was by number.

Had the catalog referred to the item by its years instead, it would look like:
When you enter in the item description, enter in both the number and the year for the individual items, as you normally would.

| Capt. Bib.Unit | 853 20 8 1 |
| Enum. BibUnit   | 863 30 8 1.10 (year) 1952 |
| Enum. BibUnit   | 863 30 8 1.20 1955 |
| Enum. BibUnit   | 863 30 8 1.30 1964 |
| Enum. BibUnit   | 863 30 8 1.40 1966 |
| Enum. BibUnit   | 863 30 8 1.50 1968 |
| Enum. BibUnit   | 863 30 8 1.60 1971 |
Common Processing Issues

Duplicate FLARE/FLR50s
Sometimes, after you’ve GF’d items on a record the day before, you’ll open the record to either find a duplicate FLARE HOL or two FLR50s. When this occurs, complete the steps below and then note the duplication in your QC so that Tabby or Madison can delete it.

Duplicate FLARE
When you open a record and spot two FLARE holdings, first see whether they both have items attached to them or not.

If there are items on both, open up the items list.
Pick one of the FLARE holdings and make sure all of the items are linked to it by unlinking and relinking the ones that are not.

Once done, go back to the BIB record and open up the FLARE record that now has no items attached to it.
Once opened, press F6 to create a field. Enter STA and then tab over three times. Enter in ‘SUPPRESSED’ and the record will be suppressed.

Now, when someone enters the record, it will be clear that this record is waiting to be deleted and that the other FLARE holding is the actual holding.

**Duplicate FLR50s**

If you open a record up and it has two FLR50s, the FLR50 with the same number as the BIB number will need to have any items removed from it and be deleted from ALEPH.

To see if the FLR50 has items, click the box to the left of it. If it states No ITEMS available, then just note on your QC that there is a duplicate FLR50 and it will be removed.
If it does have items attached to it, open up the items list. Here, unlink all of the items that are linked to the incorrect FLR50.

Then, split screen ALEPH and open up the record in both. Itemize both sides, and drag the items that are now unlinked in the incorrect FLR50 to the correct FLR50 on the other side.

Now, there should be no items attached to it and it can be listed in your QC for removal.
Phantom HOLS

A phantom holding is when the items you scanned are on a bibliographic record but the holding number they are attached to is not on the record with them.

In this case, the holding they are attached to is in ALEPH but it is caught in an in-between spot. To find it and fix it, you must search for the HOL.
First, write down the HOL number as when you switch to the ALEPH HOL screen, it will blank out your items box. Then, Click the ALEPH drop-down button on the left-hand side of the toolbox and hover over ‘Connect to…’. Switch this from BIB to HOL.

You will now be able to search by the HOL number in the box directly underneath the toolbox.

Edited 11/8/2016
Here is the holding. As you can see, it exists but is not attached to the bib number. The reason for this is that the LKR field is at the bottom of the holding. Click ‘OK’ and then move the LKR field to the top by copying and pasting it with the Ctrl+T and then Alt+T functions.
Save it and it should populate into the record where the items were.
Note: Make sure to switch your library ‘Connect to...” back to BIB after you are done.

**Items GF’d From One Record Appearing on Another**

If you open up a record the next day to complete the FLARE HOL and there is an item there that is not something you GF’d the previous day, bring it to Tabby or Madison’s attention. It is most common for these items to be monographs and therefore have no item descriptions.

Sometimes when monographs are GF’d at ALF, they will appear the next day in one of our serial records.

To fix this, leave the record open and copy the barcode of the item. Search the barcode in UF and the record it is meant to be on should pull up. With both records open, drag the item to the correct record. You may need to create a FLARE record to do this.

**Items GF’d Not Coming Over into FLARE**

When you pull up a record in which you GF’d items on the day before, always check to make sure that all of the items you GF’d have come over into FLARE. Sometimes it is obvious to tell and sometimes it is not.

If an item or a few items did not come over, the first thing to do is go back to the UF side and re-GF them. When you check back the next day, they should have transferred over this time.

If they do not transfer over with the second GF then you will need to manually add them to the FLARE side by copying down the item descriptions and barcodes and following the steps here.

**FLARE Stamps**

Every item processed into FLARE needs to be stamped with the red FLARE stamp. Ideally, this stamp will be placed either on the back of the item, under the barcode for loose issues, or inside the back of the book under the barcode for bound items.

We also stamp loose maps or posters, if possible, over existing stamps or on labels. CDs should be stamped over any labels.

**Work Logger**

All processed items need to be recorded in the ILF Work Logger on a regular basis (at least daily). Open the logger by logging into your Gmail Drive account and going to the shared document titled with your name.

Note: The document saves automatically every few seconds.

Edited 11/8/2016
The work logger is structured like an Excel sheet where you enter in information by row for every title you work on. In order of the columns:

1. Enter in the ALEPH System number (BIB) for the title you just finished processing.
2. Enter the date.
3. Is it a partial (did they send all items attached to the HOL)?
4. Did a green error box pop up when you saved your HOL record in Alpeh?
5. Enter in any issue you noticed involving the title here. Were there multiple 022 fields, conflicting 362s, no 362 at all, or 247s? Always thoroughly study the BIB record for any title you process.
6. Were there two FLARE HOLs or FLR50s that need to be dealt with?
7. Enter in the ISSN number. If there is no ISSN on the BIB, enter in either ‘s’ for a serial record or ‘m’ for a monograph record. If there are multiple ISSNs, either leave it blank or just pick one- it will be corrected later because of the ‘Multiple ISSN’ note left in row four.
8. Enter in the amount of items you GF’ed.
9. Enter in the amount of dupes you processed.
10. Enter in the holding summary for the record. You can leave this blank the day you GF the items, but the next day, after you complete your pairs and action notes, copy the

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Edited 11/8/2016
holding summary from the 583 and paste it here and highlight it green. When the holding summary is green, we know that you are done with the record and it is ready for QC.

11. The QC column is where Tabby or Madison will enter in anything that needs to be corrected in the HOL or item record(s) through the process of quality control. It will be turned red and once you have fixed the problem, turn it green and it will be re-QC’ed. The BIB number will also be turned red and whoever does the QC will turn it green after it has been re-QC’ed.

12. Enter in the amount of UCF items processed.

Glossary

AACR2- Anglo-American Cataloguing Rules
ADM- Administrative Records
ALEPH- an online library catalog that lists all of the items in FLARE
ALF- Auxiliary Library Facility
ASERL- Association of Southeastern Research Libraries
BIB- Bibliographical record
CONSER- Cooperative Online Serials Program of the PCC
FLARE- Florida Academic Repository
FLVC- Florida Virtual Campus
FRBR- Functional Requirements for Bibliographic Records
FU- University of Florida
HDF- High Density Facility
HOL- Holding
ILF- Interim Library Facility
ISSN- International Standard Serial Number
JNRL- Journal Retention and Needs Listing
JSTOR- a digital library of academic journals, books, and primary sources
LC- Library of Congress
MARC- Machine-Readable Cataloging, the standards set of digital formats for the description of items catalogued by libraries.
NISO- National Information Standards Organization
OCLC- Online Computer Library Center, a worldwide library cooperative
RDA- Resource Description and Access
SUS- Southern University System for public universities

Links

http://www.loc.gov/marc/

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