

Part 1: General Procedures for All Preliminary (Monographic) Series Bibliographic Records Received on Standing Order

Acquisitions staff should only use the procedures for monographic series bibliographic records for monographic series received on standing order.

The decision to create a standing order is generally made post-receipt with the initial volume of the series in hand; the guidelines in this document are based on this assumption. A volume in the series is either received as part of a blanket order with or without a vendor record or as a sample for selector decision.

If there is evidence on or with the issue in hand that a title change is involved, consult with your supervisor before entering a new record into the database to ensure that the new title is associated with the appropriate purchase order.

For periodicals, refer to the separate document: [Preliminary Bib Records: Serials](#) [1].

Search **Orbis** to confirm that no record exists. If no record is found, create a brief preliminary record following the procedures in Part 2. Code the **MFHD** for all preliminary records according to the procedures in Part 4.

The default decision for monographic series is **classed separately** (analyzed). If at the time of cataloging the decision is revised to **classed-together analyzed**, the cataloger will be responsible for updating the series bibliographic record accordingly. Exceptionally, acquisitions staff may treat the series as classed-together if a title change has occurred, the numbering is continuous, and the earlier title was classed-together. Even in this exceptional situation, it is recommended that acquisitions staff consult with the cataloger before treating the new series as classed-together analyzed.

Since the default decision for a monographic series is classed separately (analyzed), the preliminary bibliographic record for the series should be suppressed. With the 2005 policy change, the bibliographic record for most classed-together analyzed series (the "cover record") will be suppressed as well.

In addition to the series bibliographic record, the default procedure will be for acquisitions staff to create a separate analytic bibliographic record for the volume in hand following the guidelines for creating monographic preliminary records (or, exceptionally, serial preliminary records) (see [Preliminary Bibliographic Records](#) [2]). The analytic bibliographic record must have an 830 series field that matches the 130 of the series bibliographic record (in the absence of a 130 field, the 830 field should match the 245 ¤a ¤n ¤p). The item record should be linked to the analytic record's MFHD. If the cataloger decides not to analyze, it will be the cataloger's responsibility to relink the item record to the series bibliographic record and delete or suppress the analytic bibliographic record.

Effective Date: February 13, 2014

Source URL: <https://web.library.yale.edu/cataloging/workflow/sso/pt1>

Links

[1] <https://web.library.yale.edu/cataloging/workflow/preliminary-bib-records/pb2> [2]
<https://web.library.yale.edu/cataloging/workflow/preliminary-bib-records>