
Cataloging: A Step-by-Step Guide to Cataloging Serials in Voyager

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Cataloging Guidelines for Serials

Follow these steps for each serial to be cataloged:

1. Open OCLC CatME.
2. Click “Batch”.
3. Click “Enter Bibliographic Search Keys”.
4. Type in the appropriate search query in the “Query” box
 - a. Check the title page of the periodical for an ISSN number. If there is one, type the number without the dashes. **–or–**
 - b. Follow the 3,2,2,1/ser title search pattern. Type in the first three letters of the first word of the serial title, the first two letters of the second word, the first two letters of the third word, and the first letter of the fourth word followed by a slash and the abbreviation ser for serial. Do not use the beginning article (a, an, the) of the title but use any articles that fall in the title after the first word. If the title does not have four words, use a comma to indicate the place in the pattern.

Examples: The Atlantic Monthly = atl,mo,,/ser

Newsweek = new,,,/ser

School Library Journal = sch,li,jo,/ser

The Journal of Higher Education = jou,of,hi,e/ser

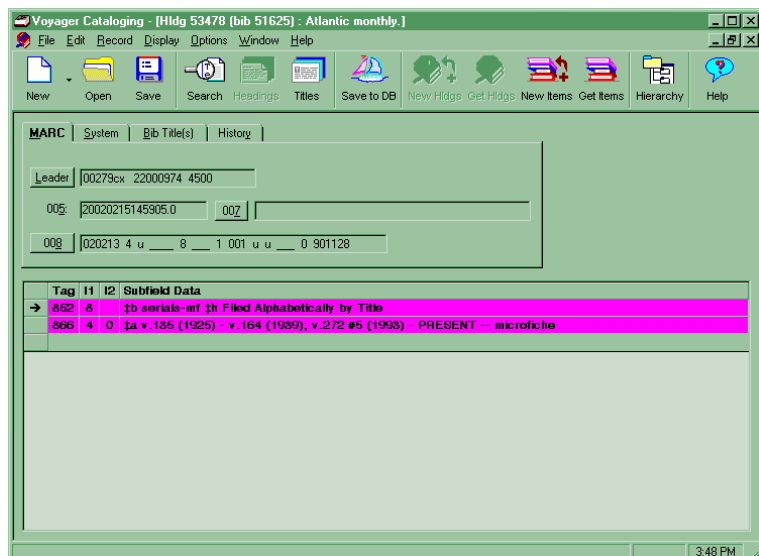
5. Click “Add”.
6. Click the “Close” button.
7. Click the “Yes” button.
8. Click “Batch”.
9. Click “Immediate Online”.
10. Click the “Process Searches” box to put a check mark in the box.
11. Click the “OK” button.
12. After CatME has logged on to OCLC and searched for the record and closed the connection, click the “Close” button.

13. Click “View”.
14. Click “Bibliographic Search Report” to see if you had a successful search. If the search was unsuccessful, check to see what the problem was with the search query. Then fix the query in the “Enter Bibliographic Search Keys” box. If the problem is that there were too many hits for the query, a new query will have to be tried.
15. Exit the Search Report box.
16. Click the “Search Bibliographic Local File” icon. (1st button on the top tool bar.)
17. Click the “List All” button.
18. Begin to study each title record in the hit list to find the OCLC record that most closely describes your serial.
19. Double click each title to open up the OCLC MARC record.
20. Click on the X in the upper right hand corner of the record box to close the record and return to the hit list.
21. Once you have decided on the record, change the Lambuth four letter institution code in the 049 tag field. The default code is UWQA. The letter A means the title will be designated as being in the Main Collection. Change the fourth letter to a P for periodical.
22. Click the following three icons:
 - a. Validate
 - b. Update Holdings
 - c. Export
23. Close the record and check if there is there is a letter, like c, r, etc., in the v, u, e columns of the hit list screen.
24. Single click the record in the hit list to highlight the record.
25. Click “Batch”.
26. Click “Online Immediate”.
27. Click the “Process Transactions” box to put a check mark in the box.
28. Click the “OK” button.
29. After CatME has logged on to OCLC and processed the record(s) and closed the connection, click the “Close” button.
30. Click “View”.
31. Click “Bibliographic Transaction Report” to see if OCLC accepted your transaction. If so, OCLC has recorded that Lambuth holds the serial in its collection.
32. Exit the Transaction Report box.
33. Click the “Search Bibliographic Local File” icon.
34. Click the “List All” button.
35. Highlight the record you have been working with in order to begin the export process into the local Voyager database.
36. Click “Batch”.
37. Click “Local Processing”.

38. Click the “Export” box to put a check mark in the box.
39. Click the “Start” button.
40. Click the “Append” button.
41. Click the “OK” button.
42. Minimize the CatME screen.
43. Open the Voyager Cataloging module.
44. Log in.
45. Click “Record”.
46. Click “Import”.
47. Click “From new file”.
48. The “Select Import File” box will open. Double click the “Catalog” folder.
49. Double click the “Import” folder.
50. Double click “lambuth.dat” file.
51. A box will open with the record that has been imported from OCLC CatME.
52. Double click the record.
53. Customize the MARC record before saving it to the Voyager database. Complete the following:
 - a. Make sure UWQP is in the 049 field line.
 - b. Delete the 300 field. Highlight the field line (a black arrow will appear in front of the field number). Right click on the black arrow and click “Delete this field”. Click the “Yes” button.
 - c. Delete any 362 fields with an indicator of 0. Keep a 362 with the indicator of 1.
 - d. If the serial title has changed during its publication lifetime, create a See Also note.
 - i. Click at the end of the line that will directly precede the new 500 line.
 - ii. Press the F4 key to create a new line.
 - iii. Type in 500.
 - iv. Tab three times.
 - v. Type See Also and the name of the changed title.
 - e. The 510 field indicates the index that indexes the periodical. Delete the 510 field lines if we do not carry that index in our collection.
 - f. Delete the subfield e in the 533 field line.
 - g. Delete all the 900 field lines.
57. Click the “Save to DB” icon. (the ship icon)
58. A dialog box will pop up asking if you want to change the Import File profile, click “No”.
59. If the “Authority Record” box pops up, click the “Continue” button.
60. Click “Options”.
61. Click “Preferences”.
62. Under the “General” tab, click the black down carrot at the end of the “Holdings/Item default location” box.

63. Choose the location of the type of periodical holdings record you are creating:
 - a. Electronic Databases
 - b. Serial – Bound
 - c. Serial – Current Issues
 - d. Serial – Microform
64. Click the “Item Defaults” tab.
65. Click the black down carrot at the end of the “Item Type” box and chose the item type just like you did for #62.
66. Click the “OK” button.
67. Click the “New Hldgs” icon. (New Holdings) **NOTE:** A new holdings record must be created for each format of the periodical you are cataloging. The following pages show examples of holdings records for each of the four formats: electronic databases, bound, current issues, and microform. One MARC record, called a Bib Record, may have as many as six holdings records attached to it depending on the number of formats. Follow the example by format when creating a holdings record.

Holdings Record for Microfiche or Microfilm

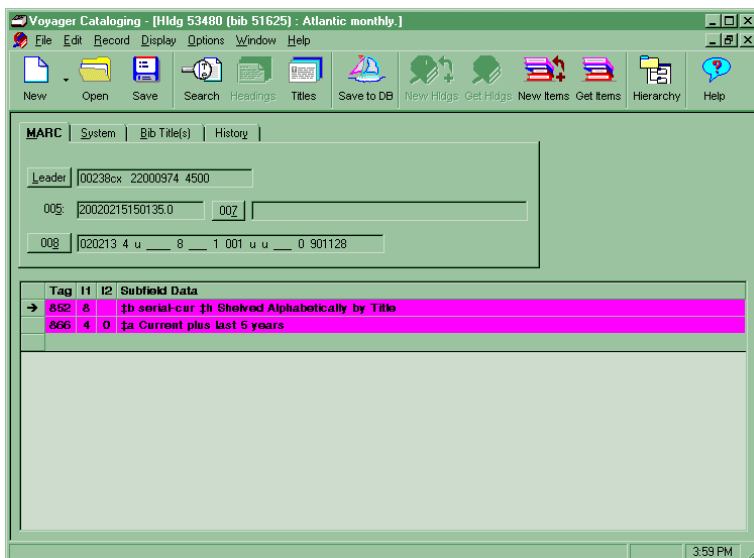


1. For the 852 field
 - a. If there is a number in the I1 (Indicator 1) column, change it to an 8. If there is no number in the I1 column, type in an 8.
 - b. Make sure the item type for subfield b is correct.
 - c. Type Filed Alphabetically by Title in subfield h.
2. Press the F4 key to create a blank line below the 852 field line.
3. Type in 866 in the Tag column.
4. Tab once and type a 4 in the I1 column.
5. Tab once and type a 0 in the I2 column.

6. Tab once. The blinking cursor will now be after the delimiter symbol and subfield a. Type the following:
 - a. v.xxx <space> = beginning volume number
 - b. (xxxx) <space> = beginning year
 - c. - <space> = through symbol
 - d. *v.xxx <space> = ending volume number
 - e. *(xxxx) <space> = ending year
 - f. *if the serial run is ongoing, type PRESENT <space> which means the library is continuing to receive current volumes
 - g. *If a serial run ends and then picks up again in a later year, type a ; to separate the runs. Generally only two runs should be recorded per line. If there are more, create another 866 field line.
 - h. -- <space> = break between enumeration and format
 - a. microfiche or microfilm

7. Go to #68 below to continue.

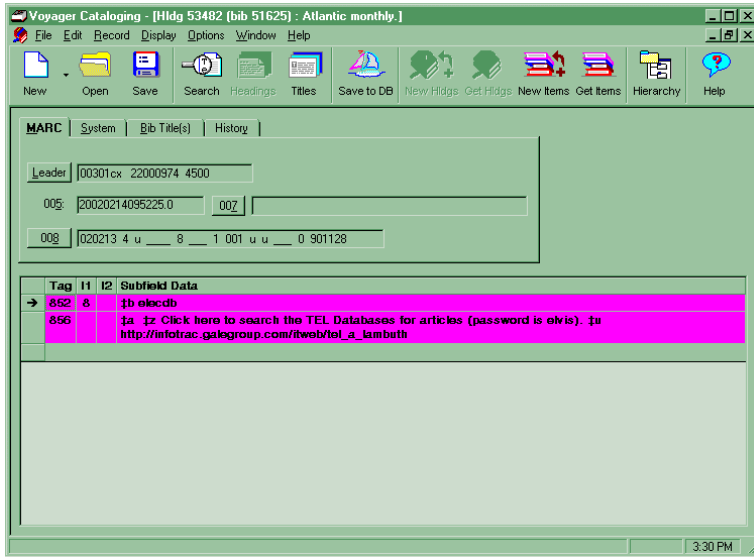
Holdings Record for Current (loose) Issues



1. For the 852 field
 - a. If there is a number in the I1 (Indicator 1) column, change it to an 8. If there is no number in the I1 column, type in an 8.
 - b. Make sure the item type for subfield b is correct.
 - c. Type Shelved Alphabetically by Title in subfield h.
2. Press the F4 key to create a blank line below the 852 field line.
3. Type in 866 in the Tag column.
4. Tab once and type a 4 in the I1 column.
5. Tab once and type a 0 in the I2 column.

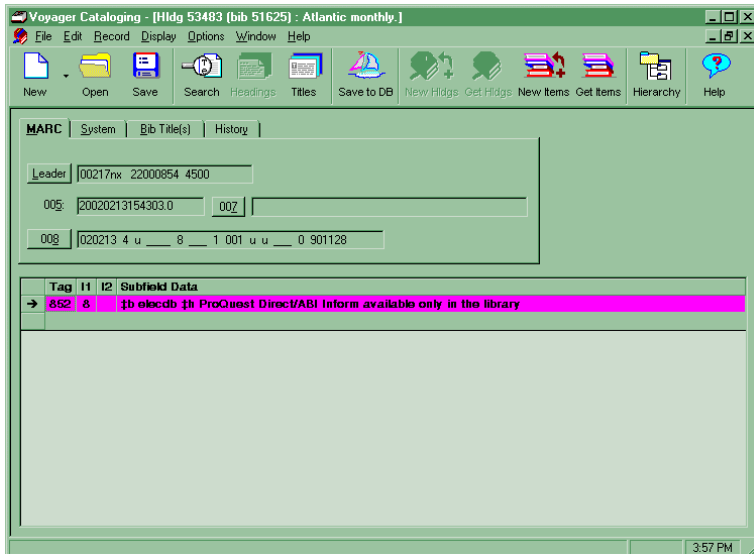
6. Tab once. The blinking cursor will now be after the delimiter symbol and subfield a. Type the following:
 - a. Current plus last ? years (Type in the correct number of years where the ? sign is.)
7. Go to #68 below to continue.

Holdings Record for TEL Electronic Databases



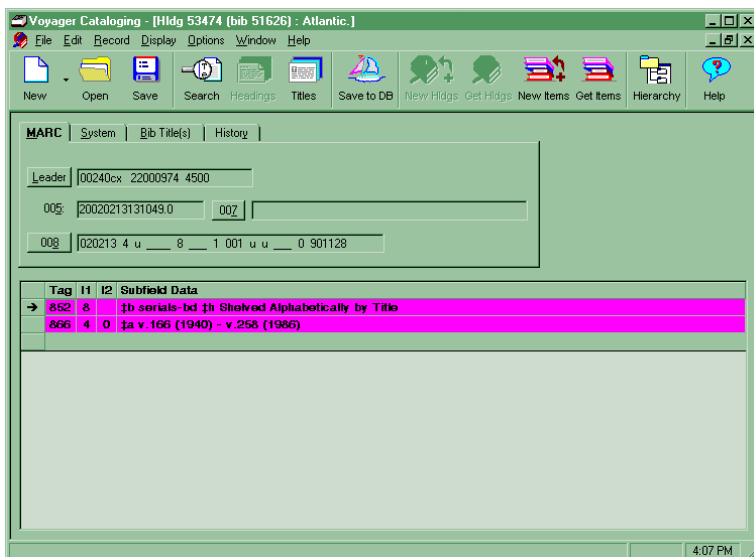
1. For the 852 field
 1. If there is a number in the I1 (Indicator 1) column, change it to an 8. If there is no number in the I1 column, type in an 8.
2. Make sure the item type for subfield b is correct.
3. Delete subfield h.
4. Press the F4 key to create a blank line below the 852 field line.
5. Type in 856 in the Tag column.
6. Tab four (3) times and press the F9 key to create a delimiter symbol.
7. Type a z after the delimiter symbol <space> Click here to search the TEL Databases for articles (password is elvis).
8. Press the F9 key to create a delimiter symbol.
9. Type a u after the delimiter symbol <space> http://infotrac.galegroup.com/itweb/tel_a_lambuth
10. Go to #68 below to continue.

Holdings Record for ProQuest Databases



1. For the 852 field
 - a. If there is a number in the I1 (Indicator 1) column, change it to an 8. If there is no number in the I1 column, type in an 8.
 - b. Make sure the item type for subfield b is correct.
 - c. Delete whatever appears after subfield h and type ProQuest Direct/ABI Inform Databases are available only in the library.
 - d. Go to #68 below to continue.

Holdings Record for Bound Volumes



1. For the 852 field
 - a. If there is a number in the I1 (Indicator 1) column, change it to an 8. If there is no number in the I1 column, type in an 8.

- b. Make sure the item type for subfield b is correct.
 - c. If nothing appears after subfield h, type Shelved Alphabetically by Title
2. Press the F4 key to create a blank line below the 852 field line.
 3. Type 866 in the Tag column.
 4. Tab once and type a 4 in the I1 column.
 5. Tab once and type a 0 in the I2 column.
 6. Tab once. The blinking cursor will now be after the delimiter symbol and subfield a. Type the following:
 - a. v.xxx <space> = beginning volume number
 - b. (xxxx) <space> = beginning year
 - c. - <space> = through symbol
 - d. *v.xxx <space> = ending volume number
 - e. *(xxxx) <space> = ending year
 - f. *if the serial run is ongoing, type PRESENT = continuing to receive current bound volumes
 7. Go to #68 below to continue.

Continue

68. Click the “Save to DB” icon to save the holdings record.
69. Close the holdings record.
70. Create a Holdings record for all other formats of the periodical. (Go back to #57.)
71. Close the bib record.
72. Minimize the catalog module.
73. Open a session in WebVoyage (the OPAC).
74. Do a “Journal Title” search for the serial you have just cataloged.
75. Check the entire OPAC display to make sure it reflects the cataloged record and each holdings record.
76. Close WebVoyage.
77. Close the catalog module.
78. Maximize CatME.
79. Click the “Search Bibliographic Local File” icon.
80. Click the “List All” button.
81. Delete the items on the hit list you have finished cataloging. The first record should be highlighted. Hold down the Shift key and click on the last item in the list you want to delete. All the records will be highlighted. Or, for the pick and choose method, highlight a record, hold down the Ctrl key and click various other records on the list you want to delete.
82. Click “Edit”.
83. Click “Delete Record(s)”.
84. Click the “Yes” button and the records will be deleted.
85. Close CatME.

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