Monographic Series Management in CyberTools
May 2018

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Introduction
Monographic series management is often a big question in scholarly and clinical collections. Monographic series are popular and expensive. You want your patrons to find them easily. This tutorial covers five methods that can be used to manage these. We found a monographic series, Advances in Health Care Management (ISSN 1474-8231), that will serve as our example with all five methods. Not all monographic series can or should be managed by each method demonstrated here, but at least one of these methods will work well.

1. Open Entry
The simplest method for managing a monographic series is the open entry. If the volumes are simple and regularly published with little content variation, then open entry works well. Simply create a bibliographic record for the series, then attach to the bib each volume as an item. The archetype is the annual Physicians' Desk Reference, PDR, ISSN 0093-4461. Our example uses the mono Advances in Health Care Management. First import the series MARC bib via Cataloging->Interactive Z39.50 MARC Bib Import using its ISSN 1474-8231. Make sure you add your items with their volume, edition and/or year values:

We created five items here. Volumes 1 (2000) and 2 (2001) have scrolled out of view. After adding the volumes, select function [Import Bibs].
Once in Batch Control you may want to add each volume’s ISBN to your bib via Batch Control->Edit Bib->MARC Editor ->Add->020:

Repeat for each year. Back in Batch Control, select functions [Update Catalog with Batch] then [Labels]:

Here's the OPAC display:
When you order the next volume, consider using Cataloging->Edit Existing Bib->MARC Bib Editor->Add Tag->020 to add the new volume’s ISBN. Also use Cataloging->New Book or A/V Item:

Notice that volume 6 has its title added as the Public Comment. Here’s the OPAC presentation:

Volume 6 displays as CyberTools item 73 in this case because there is no bar code (since we don’t have the book yet). When the item arrives, use Circulation->Item Edit to add the bar code and change the status from ON ORDER to AVAILABLE.
Here are all 17 volumes:

<table>
<thead>
<tr>
<th>Title:</th>
<th>Advances in health care management.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dates of Publication:</td>
<td>Vol. 1 (2000)-</td>
</tr>
<tr>
<td>Imprint:</td>
<td>Amsterdam ; JAI, 2000-2008 : Bingley, UK : Emerald JAI ; 2009- : Bingley, UK : Emerald</td>
</tr>
<tr>
<td>Physical Description:</td>
<td>v. : ill. ; 23 cm.</td>
</tr>
<tr>
<td>Current Frequency:</td>
<td>Annual</td>
</tr>
<tr>
<td>Physical Form:</td>
<td>Also issued online.</td>
</tr>
<tr>
<td>Topical Term:</td>
<td>Health Services Administration Delivery of Health Care--methods Delivery of Health Care--organization &amp; administration</td>
</tr>
<tr>
<td>LCCN:</td>
<td>2001233347</td>
</tr>
<tr>
<td>ISBN:</td>
<td>1474-8231</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Volume</th>
<th>Issue</th>
<th>Year</th>
<th>Copy</th>
<th>Location</th>
<th>Call Number</th>
<th>Item</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>v.3 (2002)</td>
<td></td>
<td></td>
<td></td>
<td>Gen.Col.</td>
<td>W 1 AD621P</td>
<td>123453</td>
<td>available</td>
</tr>
<tr>
<td>v.5 (2005)</td>
<td></td>
<td></td>
<td></td>
<td>Gen.Col.</td>
<td>W 1 AD621P</td>
<td>123455</td>
<td>available</td>
</tr>
<tr>
<td>v.6 (2007)</td>
<td></td>
<td></td>
<td></td>
<td>Gen.Col.</td>
<td>W 1 AD621P</td>
<td>123456</td>
<td>available</td>
</tr>
<tr>
<td>v.7 (2008)</td>
<td></td>
<td></td>
<td></td>
<td>Gen.Col.</td>
<td>W 1 AD621P</td>
<td>123457</td>
<td>available</td>
</tr>
<tr>
<td>v.8 (2009)</td>
<td></td>
<td></td>
<td></td>
<td>Gen.Col.</td>
<td>W 1 AD621P</td>
<td>123458</td>
<td>available</td>
</tr>
<tr>
<td>v.9 (2010)</td>
<td></td>
<td></td>
<td></td>
<td>Gen.Col.</td>
<td>W 1 AD621P</td>
<td>123459</td>
<td>available</td>
</tr>
<tr>
<td>v.10 (2011)</td>
<td></td>
<td></td>
<td></td>
<td>Gen.Col.</td>
<td>W 1 AD621P</td>
<td>123460</td>
<td>available</td>
</tr>
<tr>
<td>v.11 (2011)</td>
<td></td>
<td></td>
<td></td>
<td>Gen.Col.</td>
<td>W 1 AD621P</td>
<td>123461</td>
<td>available</td>
</tr>
<tr>
<td>v.16 (2014)</td>
<td></td>
<td></td>
<td></td>
<td>Gen.Col.</td>
<td>W 1 AD621P</td>
<td>123466</td>
<td>available</td>
</tr>
<tr>
<td>v.18 (2016)</td>
<td></td>
<td></td>
<td></td>
<td>Gen.Col.</td>
<td>W 1 AD621P</td>
<td>123468</td>
<td>available</td>
</tr>
</tbody>
</table>
2. Open entry with analytic linkage

Use this method to enrich your catalog when the series is regularly published, you might not acquire each volume, and when you can download or create a bibliographic record for each volume. An analytic entry is an additional enriching record associated with a primary record. Using the example of *Advances in Health Care Management*, note this journal's website [https://www.emeraldinsight.com/series/ahcm](https://www.emeraldinsight.com/series/ahcm) lists each volume. Each volume number links to a page with the volume's title, table of contents, and ISBN values. Using the CyberTools Cataloging->Interactive Z39.50 MARC Bib Import, first add the series' ISSN 1474-8231. Attach to the series' bib each *Advances in Health Care Management* volume with its bar code, volume number, and year. With the subsequent bibs add each volume's ISBN and call number.

Example: here bib#2 is v.1 2000 with ISBN 9780762306848 and call number W 84 AD621P v.1 2000:

You can see bibs #1 and #2 above, bibs #6 and #7 below. For our purposes bibs 3 through 5 representing v. 2 - v. 4 are not shown.

Since the works are available in the CyberTools Z39.50 SHDWNLM Shadow NLM server, the titles are automatically displayed. Once all of the volumes are added, select <off image (not shown)> function [Import Bibs]. When you segue to Batch Control select function [Update Catalog with Batch] then function [Item Creation]. Return to Cataloging Menu->Analytic Linkage. In Analytic Linkage, link each volume's item to each volume's own bib:
Here's the OPAC display for all 17 volumes:

[Image of the OPAC display showing the title, dates of publication, and volumes]

Title: Advances in health care management.
Dates of Publication: Vol. 1 (2000)-
Imprint: Amsterdam ; JAI, 2000-
2008 : Bingley, UK ; Emerald JAI 2009- : Bingley, UK : Emerald
Physical Description: v. ; ill. ; 23 cm.
Current Frequency: Annual
Physical Form: Also issued online.
Topical Term: Health Services Administration Delivery of Health Care--methods Delivery of Health Care--organization & administration
LCCN: 2001233347
ISSN: 1474-8231
Volume - Issue - Year - Copy - Location - Call Number - Item - Status
Gen.Col. W 1 AD621P 123451 available
Gen.Col. W 1 AD621P 123452 available
Gen.Col. W 1 AD621P 123453 available
v.5 (2005) Gen.Col. W 1 AD621P 123455 available
v.6 (2006) Gen.Col. W 1 AD621P 123456 available
v.7 (2007) Gen.Col. W 1 AD621P 123457 available
v.8 (2008) Gen.Col. W 1 AD621P 123458 available
v.9 (2009) Gen.Col. W 1 AD621P 123459 available
v.11 (2011) Gen.Col. W 1 AD621P 123461 available
v.13 (2013) Gen.Col. W 1 AD621P 123463 available
v.16 (2016) Gen.Col. W 1 AD621P 123466 available
v.17 (2017) Gen.Col. W 1 AD621P 123467 available

International best practices in health care management. Vol. 17. 2015
The analytic title is displayed under each item. The title is hyperlinked to the volume's full bib. Clicking on the title for v.7 (2008) *Patient safety and health care management. Vol. 7*, reveals that title's analytically linked full bib:

![Image of thebib](image)

It took some modest effort to fix the bibs harvested via Z39.50 downloads. Some of these improvements: we added ISBNs, added or fixed tag 490 for ISSN at subfield x and/or volume numbers at subfield v, added 245 $n volume numbers, changed call numbers, removed local extensions, etc. Some bibs had the single word "healthcare" whereas the website for the same volume showed "health care". But now it makes for a superb presentation! These improved bibs are in the CyberTools Shadow NLM Z39.50 server awaiting your retrieval! Or, [download the MARC bib file](#) for all 18 works then use Cataloging->Import a MARC Bib File (note that you might need to change Modify Rules for Bib Match->If a bib matches an existing one->Overlay Catalog's Bib with Imported Bib).

3. Serial

Use Serials Management for monographic series when you will acquire all volumes in a timely manner. *Advances in Health Care Management* is still our example. First use Cataloging->Interactive Z39.59 MARC Bib Import to harvest the series' bib by its ISSN 1474-8231:

![Image of bib import](image)

Notice that we selected the checkbox Serial, then [Import Bibs]. Because it is nearly an annual mono, we probably won't shelve it with the other journals. These will go into General Collection, each volume with its own call number. So, tell CyberTools that each issue will have a unique call number via Batch Control->Edit Bib->Brief Bib Editor->

![Image of bib editor](image)
and then <off image> select [Ok]. Back in Batch Control->Update Catalog with Batch. Navigate to Serials->Copy Edit:

Still in Serials->Issues Check In, we’ll go ahead and check in volumes 1-3: these are untitled. Starting with volume 4, the volumes have titles. Here we check in volume 8 and add the title Biennial review of health care management : meso perspectives in the Comment field:
Here's what patrons see:

Select [Show All], now with all 17 volumes:
4. Serial with analytic linkage

Use Serials Management for monographic series with CyberTools analytic linkage when you will acquire all volumes in a timely manner and you have access to or the time to create a bibliographic record for each volume. You can enrich your catalog with CyberTools analytic linkage. An analytic entry is an additional enriching record associated with a primary record. This document's section "2. Open entry with analytic linkage" treats the volumes as books series. This section 4 treats the collection as journals volumes.


![Image of a spreadsheet showing bibliographic entries for volumes 1 and 2 of a journal series.](image)

You can see bibs #1 and #2 above, bibs #6 and #7 below. For our purposes bibs 3 through 5 representing v. 2 - v. 4 are not shown.

![Image of a spreadsheet showing bibliographic entries for volumes 3 and 4 of a journal series.](image)

Since the works are in the CyberTools Z39.50 SHDWNLM Shadow NLM, the titles are automatically displayed. Once all of the volumes are added, select <off image, not shown> function [Import Bibs]. Notice that for the first bib we selected the checkbox Serial, then <off image> selected function [Import Bibs]. Because it is nearly an annual mono, we probably
won't shelve it with the other journals. The volumes will go into General Collection, each volume with its own call number. So, tell CyberTools that each issue will have a call number via Batch Control->Edit Bib->Brief Bib Editor->

and then <off image> select [Ok]. Back in Batch Control->Update Catalog with Batch. Navigate to Serials->Copy Edit:

Still in Serials->Issues Check In, we’ll go ahead and check in volumes 1 - 17. Here's a difference with the prior section: do not use the Check In <Public> Comment for the volume's title. Using the same example as the prior section, here we show volume check in but without the volume's title in the comment field:
Here's the OPAC view of the work:

![OPAC View](image)

and now the volumes:

![Volumes](image)

The bibliographic display is the same as the prior section 4 whereas the volumes' display is missing the volume titles. We'll now add the titles via analytic linkage. Return to Cataloging Menu->Analytic Linkage. In Analytic Linkage, link each volume's item to each volume's bib. Here's volume 1:
The OPAC View Picks->Volumes->Show All displays:

<table>
<thead>
<tr>
<th>Week</th>
<th>Call#</th>
<th>Item #</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>V.17 (2015, Jan)</td>
<td>1</td>
<td>Gen.Col. W 84 AD621P v.17 2015</td>
<td>123467</td>
</tr>
<tr>
<td>V.16 (2014, Jan)</td>
<td>1</td>
<td>Gen.Col. W 84 AD621P v.16 2014</td>
<td>123466</td>
</tr>
<tr>
<td>V.15 (2013, Jun)</td>
<td>1</td>
<td>Gen.Col. W 84 AD621P v.15 2013</td>
<td>123465</td>
</tr>
<tr>
<td>V.14 (2013, Jan)</td>
<td>1</td>
<td>Gen.Col. W 84 AD621P v.14 2013</td>
<td>123464</td>
</tr>
<tr>
<td>V.13 (2012, Jan)</td>
<td>1</td>
<td>Gen.Col. W 84 AD621P v.13 2012</td>
<td>123463</td>
</tr>
<tr>
<td>V.12 (2012, Jan)</td>
<td>1</td>
<td>Gen.Col. W 84 AD621P v.12 2012</td>
<td>123462</td>
</tr>
<tr>
<td>V.11 (2011, Jan)</td>
<td>1</td>
<td>Gen.Col. W 84 AD621P v.11 2011</td>
<td>123461</td>
</tr>
<tr>
<td>V.10 (2011, Jan)</td>
<td>1</td>
<td>Gen.Col. W 84 AD621P v.10 2011</td>
<td>123460</td>
</tr>
<tr>
<td>V.9 (2010, Jan)</td>
<td>1</td>
<td>Gen.Col. W 84 AD621P v.9 2010</td>
<td>123459</td>
</tr>
<tr>
<td>V.8 (2009, Jan)</td>
<td>1</td>
<td>Gen.Col. W 84 AD621P v.8 2009</td>
<td>123458</td>
</tr>
<tr>
<td>V.7 (2008, Jan)</td>
<td>1</td>
<td>Gen.Col. W 84 AD621P v.7 2008</td>
<td>123457</td>
</tr>
<tr>
<td>V.6 (2007, Jan)</td>
<td>1</td>
<td>Gen.Col. W 84 AD621P v.6 2007</td>
<td>123456</td>
</tr>
<tr>
<td>V.5 (2005, Jan)</td>
<td>1</td>
<td>Gen.Col. W 84 AD621P v.5 2005</td>
<td>123455</td>
</tr>
<tr>
<td>V.4 (2004, Jan)</td>
<td>1</td>
<td>Gen.Col. W 84 AD621P v.4 2004</td>
<td>123454</td>
</tr>
<tr>
<td>V.3 (2002, Jan)</td>
<td>1</td>
<td>Gen.Col. W 84 AD621P v.3 2002</td>
<td>123453</td>
</tr>
<tr>
<td>V.2 (2001, Jan)</td>
<td>1</td>
<td>Gen.Col. W 84 AD621P v.2 2001</td>
<td>123452</td>
</tr>
<tr>
<td>V.1 (2000, Jan)</td>
<td>1</td>
<td>Gen.Col. W 84 AD621P v.1 2000</td>
<td>123451</td>
</tr>
</tbody>
</table>
Notice that each volume's title is a hyperlink to the linked analytic bib. Selecting the link pulls that volume's own bib into view. Here we'll select v. 17 *International best practices in health care management*:

These MARC bibs are in the CyberTools Shadow NLM Z39.50 server awaiting your retrieval. Or, download the MARC bib file for all 18 works then use Cataloging->Import a MARC Bib File (note that you might have to change Modify Rules for Bib Match->If a bib matches an exit one->Overlay Catalog's Bib with Imported Bib).

5. Zero-effort automatic linkage via series title and volume number

Use this method when you do not have print and you have access to or the time to create a bibliographic record for each volume. In our quest to demonstrate analytic linkage, we not only imported the series MARC bib for *Advances in Health Care Management*, but we harvested and perfected all of the bibs for the 17 volumes in the series. Key steps:

1. Import the MARC bib for monographic series *Advances in Health Care Management*.
2. Import a bib for each of the 17 volumes in the series.
3. Add a URL to each of the bibs from steps 1 and 2.
4. For each of the 17 volumes, add the series tag 490 with:
   
   $a$ for the title;
   $x$ for the series' ISSN;
   $v$ for the volume number.

Here are the key data:

245 00 $a Advances in health care management. $n Vol. 1 / $c edited by John D. Blair, Myron D. Fottler, Grant F. Savage
490 1# $a Advances in health care management, $x 1474-8231 ; $v v. 1.

245 00 $a Advances in health care management. $n Vol. 2 / $c edited by Myron D. Fottler, Grant T. Savage, John D. Blair ; assistant editor G. Tyge Payne.
490 1# $a Advances in health care management, $x 1474-8231 ; $v v. 2
<snip>
245 00 $a Population health management in health care organizations. $n Vol. 16 / $c edited by Jennifer L. Hefner, Timothy R. Huerta, Ann Scheck McAlearney.
490 1# $a Advances in health care management, $x 1474-8231 ; $v v. 16

245 00 $a International best practices in health care management. $n Vol. 17 / $c edited by Sandra Buttigieg [and three others]
490 1# $a Advances in Health Care Management, $x 1474-8231 ; $v v. 17.
Search Catalog can find each volume by its title, or by the series title and the volume number. Example:

- **Example:**
  - The simple search of just *Advances in health care management* yields all 17 volumes:

  ![Search Result](image)

  - While the simple search of just *Advances in health care management* yields all 17 volumes:
These MARC bibs are in the CyberTools Shadow NLM Z39.50 server awaiting your retrieval. Or, download the MARC bib file for all 18 works then use Cataloging->Import a MARC Bib File (note that you might have to change Modify Rules for Bib Match->If a bib matches an exit one->Overlay Catalog's Bib with Imported Bib).

Questions? Contact Support@CyberToolsForLibraries.com.