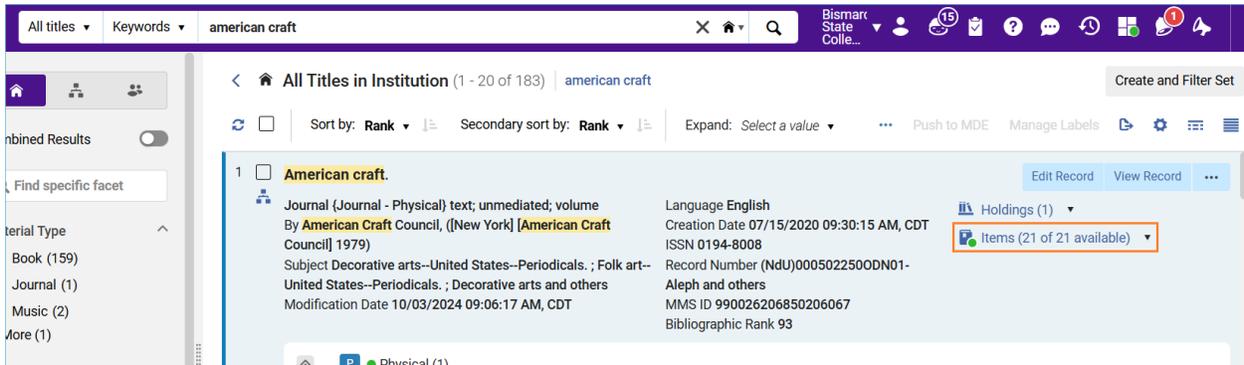


# How to Create Serial Item Records

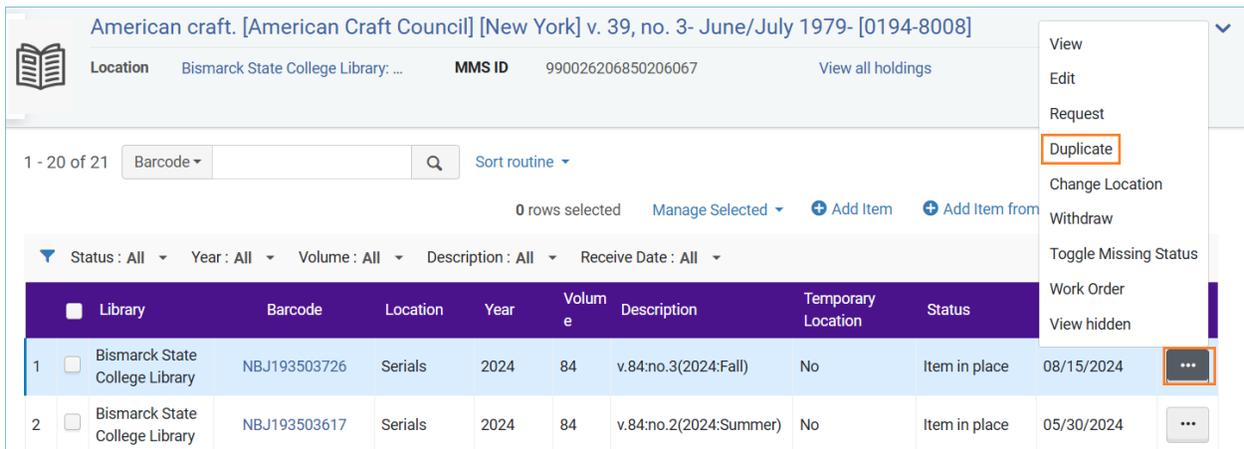
## Method 1: Easy

Search for the serial title in Alma- Search by Physical Titles or All Titles by title or ISSN. Click on the Items link on the right side of the record.



In our example there are many item records, so it opened to the full item list. If you have only a few, a split-view opens and displays the items records. Click on View full items list.

Find the most recent issue in the list, and click the action menu next to it, and select the menu option, Duplicate.



Information will be pre-filled. Update the barcode, enumeration, chronology, and description fields.

Enumeration A	<input type="text" value="84"/>	Enumeration B	<input type="text" value="4"/>
Chronology I	<input type="text" value="2024"/>	Chronology J	<input type="text" value="Winter"/>
Description	<input type="text" value="v.84:no.4(2024:Winter)"/>	<input type="button" value="Generate"/>	

Click Save.

## Method 2: Predicting issues and scanning in to receive them

Find the title in Alma, as above.

Open the title in the metadata editor, and click on the View Related Data menu, select View Inventory.

The Surgical technologist. (9984473956606067)

Record 10 91 MARC21 Bib

View Related Data

- View Collections
- View In Search (Ctrl+Alt+V)
- View Inventory (Ctrl+I)
- View Linked Data (Ctrl+Alt+L)
- View Notes

LDR	01989cas#a2200493###4500
001	9984473956606067
005	20250410160805.0
008	790228c19799999coub#p#####0###a0eng#c
010	\$\$a sc#80000031# \$\$z sn#79000872#

On the Holdings tab, click on Edit.

Inventory

Holdings(1) Portfolio(0) Representation(0) Electronic Collection(0)

1 Library: Bismarck State College Library Location: SER  
No. of items: 6 Available: 6

View Edit ...

Here is the holding record before adding a prediction pattern.

The Surgical technologist.(998447395660... (2256851520006067)

Record Holdings

LDR	00127nx###a22000611n#4500
008	1011252u#####8###4001uueng0000000
005	20250410160843.0
852 5	\$\$b NBJMA \$\$c SER

Click on the Editing Actions menu and select Expand from Template.

Select the template that best matches the serial you are working on. In this case, the serial is very regular, bimonthly.

**Expand from Template**

Choose Template: \*

Applying Method:

Override  Add missing

- 🏠 Books
- 🏠 Continuing Resources
- 🏠 Serial prediction 3 times a month
- 🏠 Serial prediction 3 times a week
- 🏠 Serial prediction 3 times a year
- 🏠 Serial prediction all enum levels are mis...
- 🏠 Serial prediction annual
- 🏠 Serial prediction annual index
- 🏠 Serial prediction annual supplement
- 🏠 Serial prediction biennial
- 🏠 **Serial prediction bimonthly**
- 🏠 Serial prediction biweekly
- 🏠 Serial prediction combined chron bimo...
- 🏠 Serial prediction combined chron quart...

Ok

There are three choices for adding the template to the holdings record:

1. Override - this will replace any existing matching fields of the record with the template fields.
2. Add missing - the fields of the template will supplement only the template's fields missing in the record.
3. Add all - this will add all the template's fields to the record, keeping the record's existing fields, even if matched.

### Expand from Template

Choose Template: \*

Applying Method:

Override  
 Add missing  
 Add all

[Cancel](#)   [Ok](#)

Click OK and the prediction is added to the holding record in the 853 field (or an 854/855 field depending on the template). A 590 is also added with a default message from the template. (This does not appear in Primo VE, so it is harmless. Also, it can be deleted.) Save the holdings record. Here is what the holding record looks like:

**The Surgical technologist.(998447395660...** (2256851520006067) 📄 ⓘ ✕

🏠 Record Holdings

<b>LDR</b>	<input type="text" value="00127nx##a22000611n#4500"/>	⋮
008	1011252u#####8###4001uueng0000000	
005	20250410160843.0	
852 5	\$\$b NBJMA \$\$c SER	
853 0 3	\$\$a v. \$\$b no. \$\$u 6 \$\$v r \$\$i (year) \$\$j (month) \$\$w b \$\$8 1	
590	\$\$a A bimonthly publication that begins with v.1:no.1(2015:Jan.).	

Next, add the information for the first predicted issue. Click to activate the 853 field, then click on the Record Action menu, and select Next predicted item's information.

Save New Record Action... Editing Actions... Add Inventory View Related D... Order Search & Brow... Quick links

The Surgical technologis

- Record
- 10

LDR 01989casf  
001 99844739f  
005 20250410  
008 790228c1f  
010 \$\$a sc#80  
016 7 \$\$a 79075  
016 7 \$\$a S4877  
016 7 \$\$a 01050  
019 \$\$a 10648  
12028685f  
022 0 \$\$a 0164-  
032 \$\$a 01851  
035 \$\$a (OCoL  
(OCoLC)1  
(OCoLC)1  
035 \$\$a (OCoL  
037 \$\$b Assoc  
Parkway, L  
040 \$\$a COU S  
DLC \$\$d C  
AIP \$\$f N

Record Action...  
Release Record (Alt+Shift+R)  
Reload Original Record  
Duplicate Record  
Validate (Ctrl+U)  
Add Note  
Assign Record to Another Cataloger  
Release Assignment  
Release Records of Another Cataloger  
 Suppress from Discovery (Alt+Shift+S)  
 Suppress from External Search  
Update from Bibliographic  
Relink to a Different Record  
Generate Accession Number (Shift+Ctrl+A)  
Next predicted Item's information  
Open predicted items

The Surgical technologist.(998447395660... (2256851520006067)

Record Holdings

LDR 00258nx##a22000851n#4500  
008 1011252u####8###4001uueng0000000  
005 20250410162900.0  
852 5 \$\$b NBJMA \$\$c SER  
853 0 3 \$\$a v. \$\$b no. \$\$u 6 \$\$v r \$\$i (year) \$\$j (month) \$\$w b  
\$\$8 1  
590 \$\$a A bimonthly publication that begins with  
v.1:no. 1(2015:Jan.).

This box appears, fill in the issue's information. Click Close.

### Next predicted item's information

First level of enumeration(a)

Second level of enumeration(b)

First level of chronology(i)

Second level of chronology(j)

Issue Date

Now you can view and open the predicted issues by clicking the Record Actions menu and selecting Open predicted items. Each predicted cycle is for one year. If the prediction looks correct, click Save. If the prediction does not look correct, click Discard and edit either the holding record or the next predicted item's information.

### Predicted Items

Description	Status	Expected Arrival Date
1 v.101:no.1(2025:Jan./Feb.)	Item not in place	2025-01-01
2 v.101:no.2(2025:Mar./Apr.)	Item not in place	2025-03-01
3 v.101:no.3(2025:May/June)	Item not in place	2025-05-01
4 v.101:no.4(2025:July/Aug.)	Item not in place	2025-07-01
5 v.101:no.5(2025:Sept./Oct.)	Item not in place	2025-09-01
6 v.101:no.6(2025:Nov./Dec.)	Item not in place	2025-11-01

Discard
Save

When you return to the item list for the serial, you will see the predicted items there:

Status : All Year : All Volume : All Description : All Receive Date : All

	Library	Barcode	Location	Year	Volume	Description	Temporary Location	Status	Receiving date	
1	<input type="checkbox"/> Bismarck State College Library	NBJ193503949	Serials	2025	101	v.101:no.6(2025:Nov./D...	No	Item not in place	-	...
2	<input type="checkbox"/> Bismarck State College Library	NBJ193503948	Serials	2025	101	v.101:no.5(2025:Sept./...	No	Item not in place	-	...
3	<input type="checkbox"/> Bismarck State College Library	NBJ193503947	Serials	2025	101	v.101:no.4(2025:July/A...	No	Item not in place	-	...
4	<input type="checkbox"/> Bismarck State College Library	NBJ193503946	Serials	2025	101	v.101:no.3(2025:May/J...	No	Item not in place	-	...
5	<input type="checkbox"/> Bismarck State College Library	NBJ193503945	Serials	2025	101	v.101:no.2(2025:Mar./A...	No	Item not in place	-	...
6	<input type="checkbox"/> Bismarck State College Library	NBJ193503944	Serials	2025	101	v.101:no.1(2025:Jan./F...	No	Item not in place	-	...

The Get It area in the Primo VE view is also updated.

## Bismarck State College Library

May be available , Serials

from:100 2024 until:101 2025

On order until 11/01/2025 (0 requests) v.101:no.6(2025:Nov./Dec.)  
Available

On order until 09/01/2025 (0 requests) v.101:no.5(2025:Sept./Oct.)  
Available

On order until 07/01/2025 (0 requests) v.101:no.4(2025:July/Aug.)  
Available

On order until 05/01/2025 (0 requests) v.101:no.3(2025:May/June)  
Available

Once the holding record is set up, you can also open predicted issues from the item list. Click Manage Selected and click Open Predicted Items.

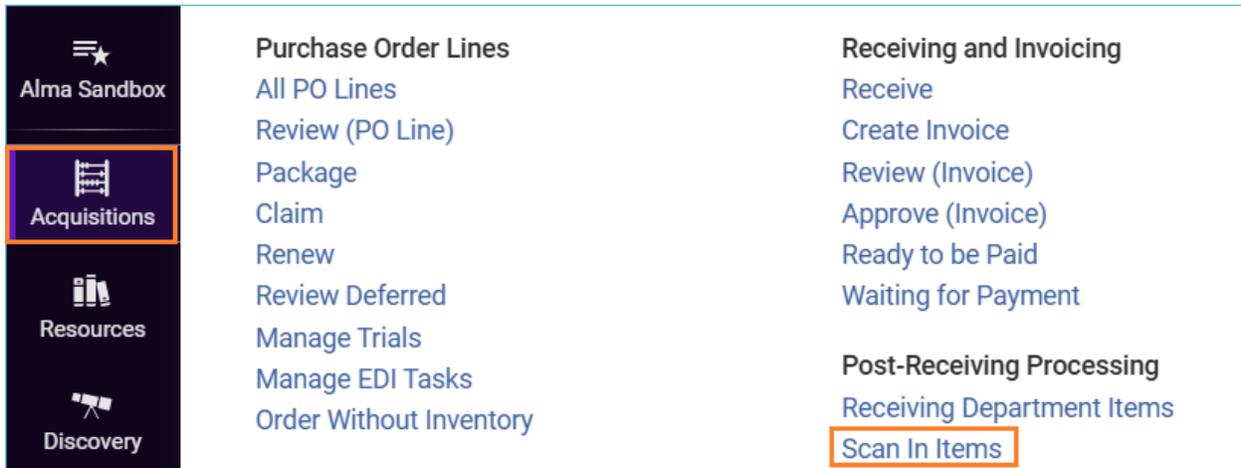
The screenshot shows a library item list interface. At the top, it indicates "0 rows selected" and provides options to "Manage Selected", "Add Item", and "Add Item from Template". Below this is a table with columns for Year, Volume, Description, Temporary Location, Status, and Receiving date. A dropdown menu is open over the table, listing several actions: Bind Items, Change Holdings, Open Predicted Items (highlighted), Relink to another bib, Withdraw Items, Add to Itemized Set, Clear Selection, Create Itemized Set, and Run a Job. The table rows show items with status "Item not in place" and a receiving date of "-".

Year	Volume	Description	Temporary Location	Status	Receiving date
2025	101	v.101	lo	Item not in place	-
2025	101	v.101	lo	Item not in place	-
2025	101	v.101	lo	Item not in place	-
2025	101	v.101	lo	Item not in place	-

## Receiving Predicted Issues

To receive a predicted issue, find the issue in the item list and copy the barcode.

Navigate the Acquisitions menu, and under Post-receiving processing, click on Scan In Items.



Click the Change Item Information tab to make it active. Set the change type to Permanent and set the location to the location where your library stores serials. Paste the barcode in the Scan item barcode field. Click OK.

The screenshot shows the 'Scan In Items' form. The 'Change Item Information' tab is active and highlighted with an orange box. The 'Change Type' dropdown is set to 'Permanent' and the 'Location \*' dropdown is set to 'Serials', both highlighted with orange boxes. The 'Scan item barcode \*' field contains 'NBJ193503944' and is highlighted with an orange box. The 'OK' button is also highlighted with an orange box.

A message pops up to confirm you want to change the item's information even though the item was not received by the acquisitions department. Click Confirm.

## Confirmation Message

Please note the following:



Item has not been received by the Acquisition Department

Are you sure you want to perform this action?

Cancel

Confirm

The issue appears with the “item in place” status after a reshelving period.

6	<input type="checkbox"/>	Bismarck State College Library	<a href="#">NBJ193503944</a>	Serials	2025	101	v.101:no.1(2025:Jan./F...	No	Item in place (awaiting reshelving until 04/11/2025 12:55:00 AM, CDT)	-
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