



Evergreen Indiana Cataloging Roundtable:

Managing Monographic Parts

Instructor

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What are Monographic Parts?

Monographic parts are separate items which are part of the same bibliographic entity, meaning you have items with different content attached to the same bib. record.

What are Monographic Parts?

Examples of monographic parts include:

- Various volumes of one book, such as an encyclopedia or other multi-volume work
- Separate parts in large audiobook
- Separate parts or discs in an DVD set
- Some libraries treat the books in Manga series as monographic parts

Monograph Parts and Volumes

- Usually monographic parts are referred to as volumes.
- Since in Evergreen, any separate call numbers are called volumes, in some cases you might add multiple “volumes” to a record that are not separate monographic parts.

Monograph Parts and Volumes

When do you NOT need to assign parts to separate “volumes”?

If you added more than one volume because you assigned different call numbers to multiple copies of the same item, you don't need to assign parts to the items.

Monographic Parts and Holds

- Previously monographic parts were problematic for holds because patrons could only place title holds and any available part could fill the hold.
- This led to upset patrons not understanding why they kept getting part 1 when they wanted part 2
- A hold for a specific part could only be placed by using the staff client to place a volume or copy hold.

Monographic Parts and Holds

If you use the monographic parts manager to assign parts to your items, patrons will be able to place their own holds and get the part they want.

Additionally, for item types that circulate between Evergreen libraries, the patron can receive the part they want from any library, not just a specific copy as with copy holds.

Parts are for Everyone

When you create parts, you create them for the whole consortium. Once one person creates parts, everyone else who has the same parts will apply those parts to their items.

- If you create different names for the same parts, that will affect holds.
- If I create a part named Part 1, and instead of using that part, you create a part named Part One, then both our items would not be available to fill a hold because patrons will have to choose between Part 1 and Part One.

Managing Parts

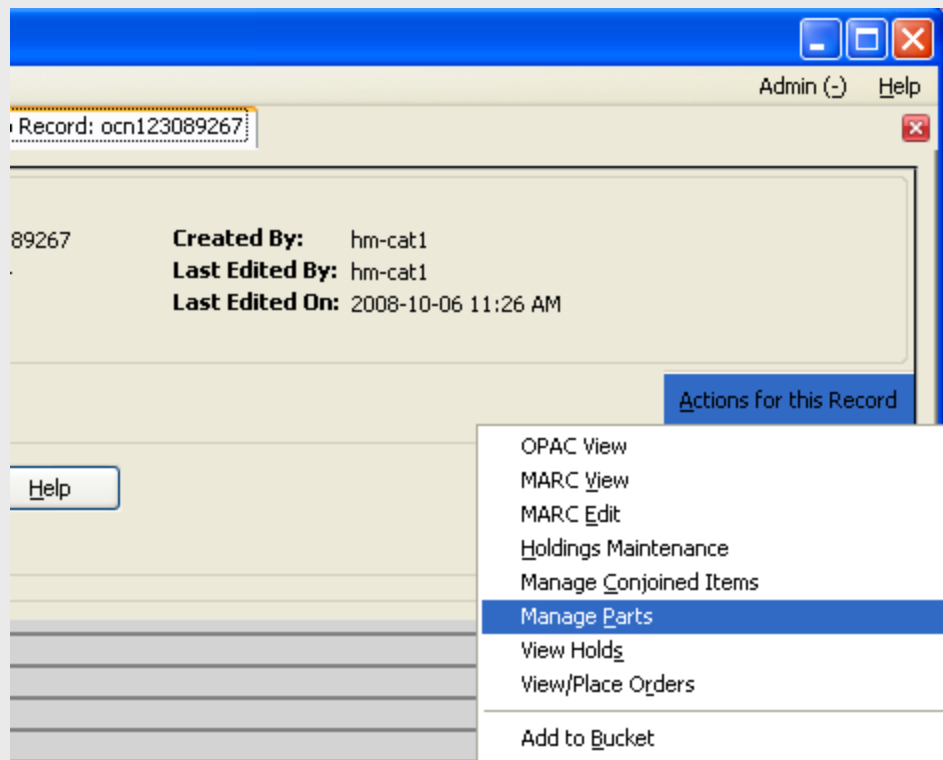
There are two ways to create parts in Evergreen. You can create parts from the Manage Parts screen, or from the Volume/Copy Creator.

If you create parts using Manage Parts, there are two steps

1. Creating the parts
2. Assigning the parts to your items

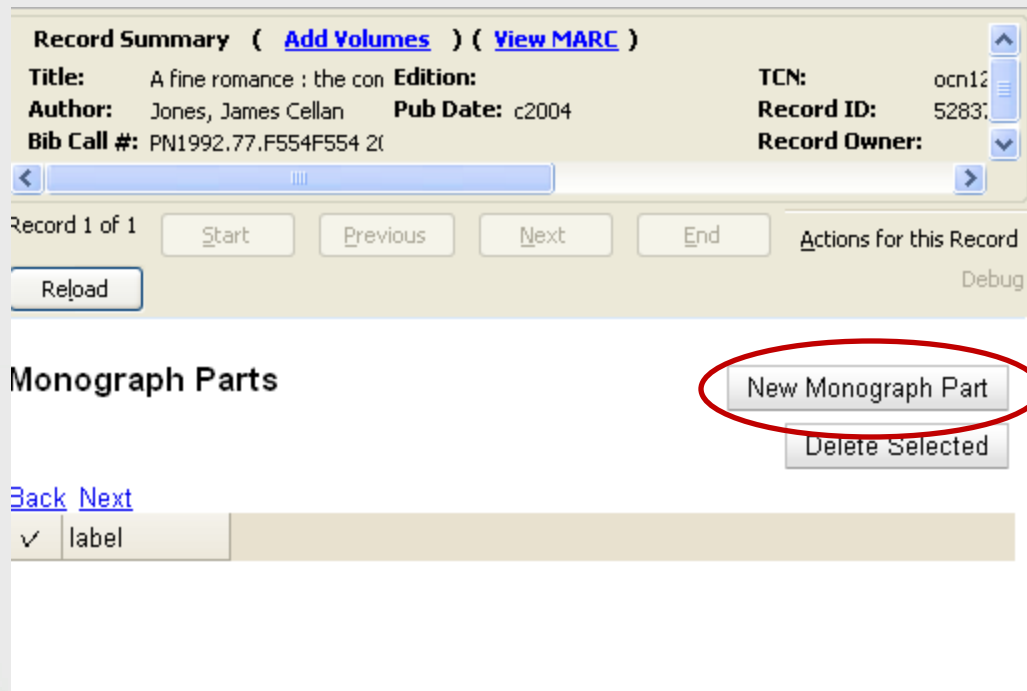
Creating Parts from Manage Parts

- To create your parts, go to Actions for this Record and select Manage Parts.



Creating Parts

- The Monographic Part manager will open up.
- To create a part, click New Monographic Part.



Record Summary ([Add Volumes](#)) ([View MARC](#))

Title: A fine romance : the con **Edition:** TCN: ocn12
Author: Jones, James Cellan **Pub Date:** c2004 **Record ID:** 5283
Bib Call #: PN1992.77.F554F554 2i **Record Owner:**

Record 1 of 1 [Start](#) [Previous](#) [Next](#) [End](#) [Actions for this Record](#) [Debug](#)

[Reload](#)

Monograph Parts

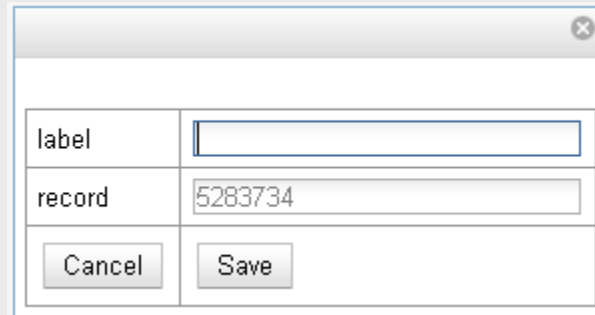
[Back](#) [Next](#)

✓	label
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[New Monograph Part](#)
[Delete Selected](#)

Creating Parts

- Next, type your part name into the box.



A screenshot of a dialog box with a close button (X) in the top right corner. The dialog box contains two input fields and two buttons. The first field is labeled 'label' and is empty. The second field is labeled 'record' and contains the text '5283734'. Below the fields are two buttons: 'Cancel' and 'Save'.

label	<input type="text"/>
record	<input type="text" value="5283734"/>
<input type="button" value="Cancel"/>	<input type="button" value="Save"/>

Naming Parts

It's very important to use specific, descriptive names when creating your parts, because patrons will be given the list of parts to choose from when placing a hold. They need to know what item they are putting on hold.

Naming Parts

Some suggested guidelines when naming parts:

- Don't use abbreviations, since different libraries in the consortium may abbreviate things differently.
- Use numerals: 1, 2, 3, etc.
- Be specific! If you have an audiobook set with 2 parts, list the discs in the parts, so that other libraries can be sure their parts are the same.

Ex: Part 1, Discs 1-20; Part 2, Discs 21-37

Naming Parts

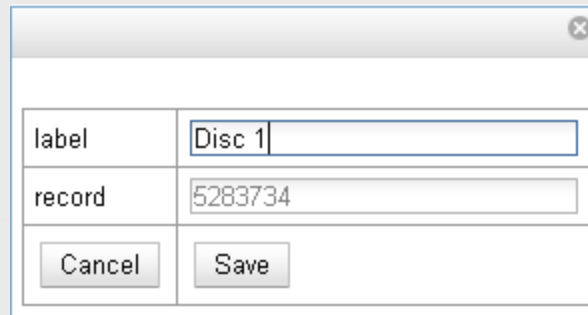
- If the parts have a name, include the name.
- Keep in mind the way parts are described in the MARC record when naming parts.
- If you don't agree with the name of the part someone else has created, DON'T create another part. If the part name is understandable, use it. If not, contact the cataloger who created the part and suggest a new name for the part. **We don't want more than one name for the same part**

Naming Parts

- For audiobook sets, since the division of those sets is usually pretty straightforward, it's best to use the same parts. If the parts are Part 1, Discs 1-20 and Part 2, Discs 21-37, use the same parts. Don't divide your set as Part 1, Discs 1-19, and Part 2, Discs 20-37.
- BUT, it's OK to use different parts than another library. If you circulate all the discs in a DVD set together, that's fine. You don't need to divide your set into 1 disc parts just because another library did.

Naming Parts

With all that said, naming parts should be pretty straight forward. Here I have a DVD set with 6 discs. I'm going to name my first part:



A screenshot of a dialog box with a title bar and a close button (X). The dialog contains two input fields: 'label' with the text 'Disc 1' and 'record' with the text '5283734'. Below the input fields are two buttons: 'Cancel' and 'Save'.

label	Disc 1
record	5283734
Cancel	Save

Type in the name and click Save.

Naming Parts

- Your part name will be displayed on the Manage Parts screen.

Record 1 of 1 Start Previous Next End Actions for this Record Debug

Reload

Monograph Parts

New Monograph Part

Delete Selected

[Back](#) [Next](#)

<input checked="" type="checkbox"/>	label	
<input type="checkbox"/>	Disc 1	

Naming Parts

Repeat these steps for all your parts.

Monograph Parts New Monograph Part
Delete Selected

[Back](#) [Next](#)

<input checked="" type="checkbox"/>	label	
<input type="checkbox"/>	Disc 1	
<input type="checkbox"/>	Disc 2	
<input type="checkbox"/>	Disc 3	
<input type="checkbox"/>	Disc 4	
<input type="checkbox"/>	Disc 5	
<input type="checkbox"/>	Disc 6	

Assigning Parts

- If you create parts from Manage Parts, creating the parts is just the first step.
- The parts will do absolutely nothing for you unless you assign them to your items.

Assigning Parts

There are a few ways to assign parts.

- You can assign parts to existing items from the Replace Barcode function.
- You can assign parts from the Volume Editor when adding items.
- You can assign parts using the Combined Volume/Copy Editor if that's how your workstation is set up.

Assigning Parts to Existing Items

- From the Holdings Maintenance screen,
- Highlighting the items and
- Right-click, or from Actions for Selected Rows/Items,
- Select **Replace Barcode**.

Assigning Parts to Existing Items

- From the Replace barcode screen the last column is the Part Designation Column.

Call Number	Suffix	# of Copies	Barcode	Part Designation
DVD FIC FINE DISC 1	<input type="text"/>	1	33946002326101	<input type="text"/>
DVD FIC FINE DISC 2	<input type="text"/>	1	33946002326119	<input type="text"/>
DVD FIC FINE DISC 3	<input type="text"/>	1	33946002326127	<input type="text"/>
DVD FIC FINE DISC 4	<input type="text"/>	1	33946002326135	<input type="text"/>
DVD FIC FINE DISC 5	<input type="text"/>	1	33946002326143	<input type="text"/>
DVD FIC FINE DISC 6	<input type="text"/>	1	33946002326150	<input type="text"/>

Call Number: Suffix: BATCH

Assigning Parts to Existing Items

- Select the appropriate parts from the dropdown lists.

Call Number	Suffix	# of Copies	Barcode / Part Designation	
DVD FIC FINE DISC 1	<input type="text"/>	1	33946002326101	Disc 1
DVD FIC FINE DISC 2	<input type="text"/>	1	33946002326119	Disc 1
DVD FIC FINE DISC 3	<input type="text"/>	1	33946002326127	Disc 3
DVD FIC FINE DISC 4	<input type="text"/>	1	33946002326135	Disc 4
DVD FIC FINE DISC 5	<input type="text"/>	1	33946002326143	Disc 1 Disc 2 Disc 3 Disc 4 Disc 5
DVD FIC FINE DISC 6	<input type="text"/>	1	33946002326150	

Assigning Parts to Existing Items

Once you have assigned parts to all your items, click Re-barcode/Update Items.

Call Number	Suffix	# of Copies	Barcode / Part Designation	
DVD FIC FINE DISC 1	<input type="text"/>	1	33946002326101	Disc 1 <input type="text"/>
DVD FIC FINE DISC 2	<input type="text"/>	1	33946002326119	Disc 1 <input type="text"/>
DVD FIC FINE DISC 3	<input type="text"/>	1	33946002326127	Disc 3 <input type="text"/>
DVD FIC FINE DISC 4	<input type="text"/>	1	33946002326135	Disc 4 <input type="text"/>
DVD FIC FINE DISC 5	<input type="text"/>	1	33946002326143	Disc 5 <input type="text"/>
DVD FIC FINE DISC 6	<input type="text"/>	1	33946002326150	Disc 6 <input type="text"/>

Use Checkdigit Print Labels? **Re-barcode / Update Items** Edit then Re-barcode

Your parts will be assigned.

Assigning Parts to Existing Items

- You can also assign parts to existing items from the Unified Volume/Copy editor.
- To do this open the Volume/Copy editor from the Holdings Maintenance screen, and the Parts dropdown list will appear next to your barcode.
- The Unified Volume/Copy editor is an optional setting that can be set for your library via the Library Settings Editor.

Assigning Parts to Existing Items

Templates: Adult CD Roms Apply Delete Import Export Save Reset

Volume and Copy Creator

Classification: <No Change> **Prefix:** <No Change> **Call Number:** **Suffix:** <No Change> **BATCH** Apply

Library	# of volumes	Classification	Prefix	Call Number	Suffix	# of Copies	Barcode / Part Designation
HMMPL	1	Generic		DVD FIC FLAME V.2		1	33946002326259

Auto-Generate Barcodes? Use Checkdigit Print Labels? Re-barcode

Copy Editor

Barcode 33946002326259 1 copy	Circulation Library HMMPL 1 copy	Holdable? Yes 1 copy	Deposit? No 1 copy	Loan Duration Normal 1 copy	OPAC Visible? Yes 1 copy
Creation Date 2007-06-29 1 copy	Owning Lib : Call Number 1 copy	Age-based Hold Protection 6month 1 copy	Deposit Amount 0.00 1 copy	Floating? No 1 copy	Price 25.00 1 copy
Creator admin 1 copy	Copy Number <Unset> 1 copy	Fine Level Normal 1 copy	Reference? No 1 copy	Legacy Item Call FIC 1 copy	Legacy Item Cat2 ADULT 1 copy
Last Edit Date 2012-01-24 1 copy				HMMPL : Legacy Home Location AFD 1 copy	HMMPL : Legacy Item Type DVD 1 copy
Last Editor hm-circ1 1 copy					

Assigning Parts to Existing Items

- If you're using the Unified Volume/Copy editor, note that it only opens from the Holdings Maintenance screen.
- If you're interested in using the unified volume/copy editor, we'll come back to that at the end.

Parts and the Column Picker

- You can view the parts assigned to items from the Holdings Maintenance and Item Status screens, as well as other column picker screens, such as Check-In.
- I recommend setting your Holdings Maintenance Screen so you can see the parts assigned. Your circ staff may also find it useful to see the parts at check-in.

Parts and the Column Picker

Consortial Total: 12 Available: 12 Actions for Selected Rows

Part	Price	Status	⌵
Disc 1	79.9		<input checked="" type="checkbox"/> Location/Barcode
Disc 1	79.9		<input checked="" type="checkbox"/> Volumes
Disc 3	79.9		<input checked="" type="checkbox"/> Copies
Disc 4	79.9		Alert Message
Disc 5	79.9		Barcode
Disc 6	79.9		CN Prefix
			Call Number
			CN Suffix
			Circulate As Type
			Circulation Library
			<input checked="" type="checkbox"/> Circulation Modifier
			Circulate?
			Copy ID
			Copy Number
			Classification
			Deposit Amount
			Deposit?
			Due Date
			Fine Level
			Holdable?
			<input checked="" type="checkbox"/> Loan Duration
			<input checked="" type="checkbox"/> Location
			OPAC Visible?
			Owning Library
			<input checked="" type="checkbox"/> Part

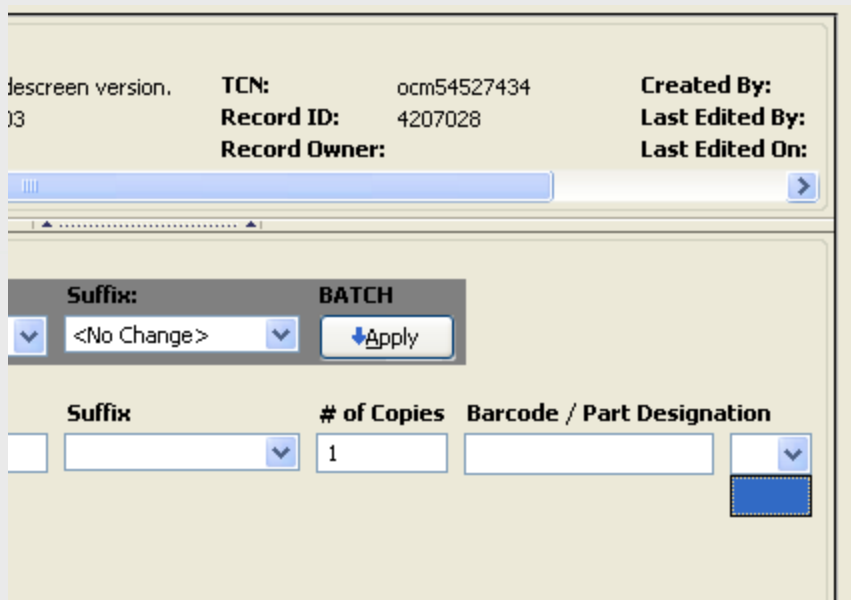
Select Part from the Column Picker list to display your parts.

Creating Parts

- When assigning parts to new items, create your parts first, and then add the items.
- This will save you a step. If you add the items and then create the parts, you can then just assign the parts the way you do with existing items.

Assigning Parts to New Items

If you don't create your parts first, the parts dropdown will be empty when you add your items.



descreen version. TCN: ocm54527434 Created By:
03 Record ID: 4207028 Last Edited By:
Record Owner: Last Edited On:

Suffix: BATCH
<No Change> Apply

Suffix	# of Copies	Barcode / Part Designation
<No Change>	1	

Assigning Parts to New Items

So create your parts first. You'll find that you can assign your parts from the Volume/Copy Creator, just as you would from the Re-barcode screen.

Call Number	Suffix	# of Copies	Barcode / Part Designation
PN1992.77.F554F554 2002	<input type="text"/>	1	<input type="text"/>
PN1992.77.F554F554 2002	<input type="text"/>	1	<input type="text"/>
PN1992.77.F554F554 2002	<input type="text"/>	1	<input type="text"/>
PN1992.77.F554F554 2002	<input type="text"/>	1	<input type="text"/>
PN1992.77.F554F554 2002	<input type="text"/>	1	<input type="text"/>
PN1992.77.F554F554 2002	<input type="text"/>	1	<input type="text"/>

▼

- Disc 1
- Disc 2
- Disc 3
- Disc 4
- Disc 5
- Disc 6



Placing Holds on Items with Parts

Once parts are assigned patrons can place holds on the part they need.

The part names appear in a drop down list on the holds screen, so be sure to use part names that will be clear to users.

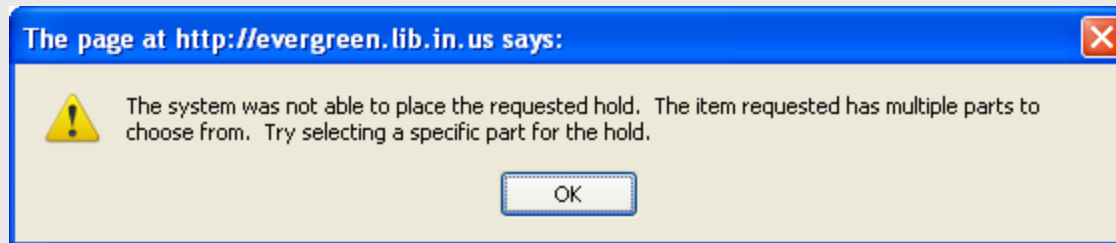
Placing Holds on Items with Parts

If you try to place a hold on an record with parts attached there will be a dropdown list to choose the part you want.

Create / Edit a Hold	
Recipient:	Childs, Sarah
Title:	Firefly The complete series
Author:	Whedon, Joss
Format:	 Video Recordings
Physical Description:	videorecording videodisc 4 videodiscs (675 min.) : sd., col. ; 4 3/4 in.
Monograph Parts:	<input type="text" value=""/> 
Contact telephone number:	<input type="text" value="888"/> (000-YYY-ZZZZ X123)
Enable phone notifications for this hold?	<input type="checkbox"/>



Placing Holds on Items with Parts

If the user doesn't choose a part, this error message will be displayed:



Placing Holds on Items with Parts

- In the Staff Client and in the Firefox browser, the Parts dropdown list will then turn red.
- Unfortunately, it doesn't do this in Internet Explorer, so staff should be aware of this when helping patrons.

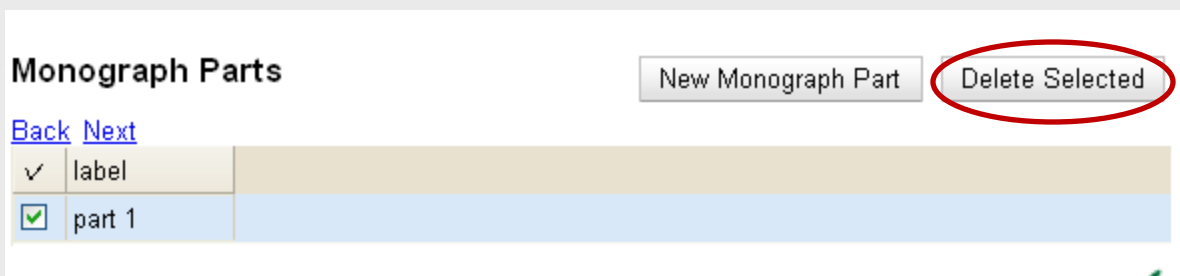
Create / Edit a Hold	
Recipient:	Childs, Sarah
Title:	Firefly The complete series
Author	Whedon, Joss
Format	 Video Recordings
Physical Description:	videorecording videodisc 4 videodiscs (675 min.) : sd., c
Monograph Parts:	<input type="text" value=""/> 
Contact telephone number:	<input type="text" value="317-298-7888"/> (000-YYY-ZZZZ X123)



Deleting Parts

Deleting parts is really simple.

- Go to manage parts.
- Click the boxes to select the parts you want to delete.
- Click **Delete Selected**.



Monograph Parts

[Back](#) [Next](#)

label

part 1

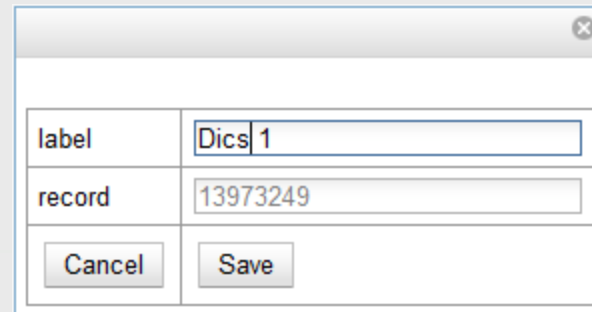
That's it.

Deleting Parts

- Most of the time, there's no need to delete the parts you've created.
- Parts attached to a record do not prevent the record from being deleted.
- Since the parts are used by multiple users, you shouldn't delete your parts because someone else may have items attached to them.

Renaming Parts

- To rename parts open the record in the Manage Parts view.
- Double click on the part name.
- This box will open, allowing you to edit the name.

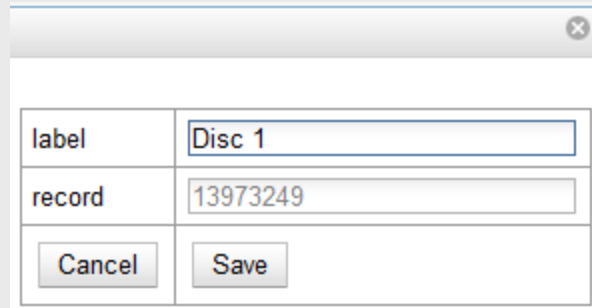


A screenshot of a dialog box with a title bar and a close button (X). The dialog box contains two input fields: 'label' with the text 'Discs 1' and 'record' with the text '13973249'. Below the input fields are two buttons: 'Cancel' and 'Save'.

label	Discs 1
record	13973249
Cancel	Save

- Once you've made the desired changes, click Save.

Renaming Parts



label	Disc 1
record	13973249
Cancel	Save

- The part name will be changed for you and anyone else with the same part, so do not change the meaning of the part name.
- For instance don't change Part 1 to Parts 1 & 2 if anyone else is using the part.
- You can see if others are using the part by switching to OPAC view.

The Unified Volume/Copy Creator

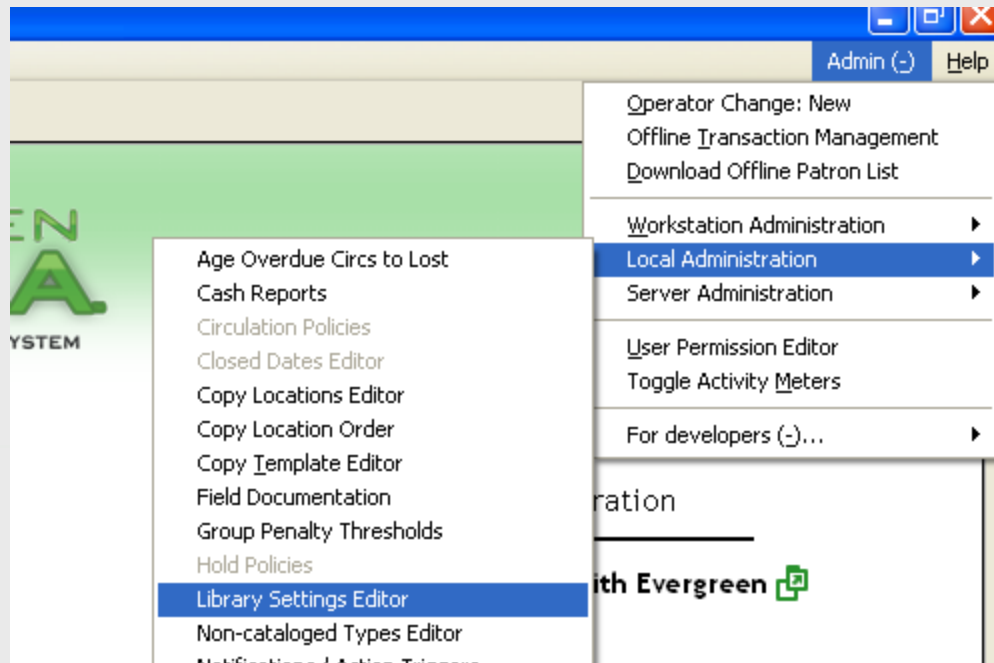
- Currently the default for adding and editing copies and volumes is that it's a two step process.
- After you add items using the Volume Editor, the Copy Editor opens, and you can apply your templates and item settings.
- With the Unified Volume/Copy Creator, these actions both occur on one screen.

The Unified Volume/Copy Creator

- There are advantages and disadvantages to both approach, so will have to decide which is best for your library.
- The setting is for the whole library, so if you decide to use the Unified Volume/Copy Creator, all catalogers at your library will use it.
- You have to make the change from the Admin module, using a log-in with local Admin permissions.

The Unified Volume/Copy Creator

To change the setting, go to Admin --> Local Administration --> Library Settings Editor.



The Unified Volume/Copy Creator

Note that it will probably take a while to load.

If you have branches, choose whether to apply it to one branch or the whole system in the Context Location dropdown list.

Then scroll down to GUI: Unified Volume/Item Creator/Editor.

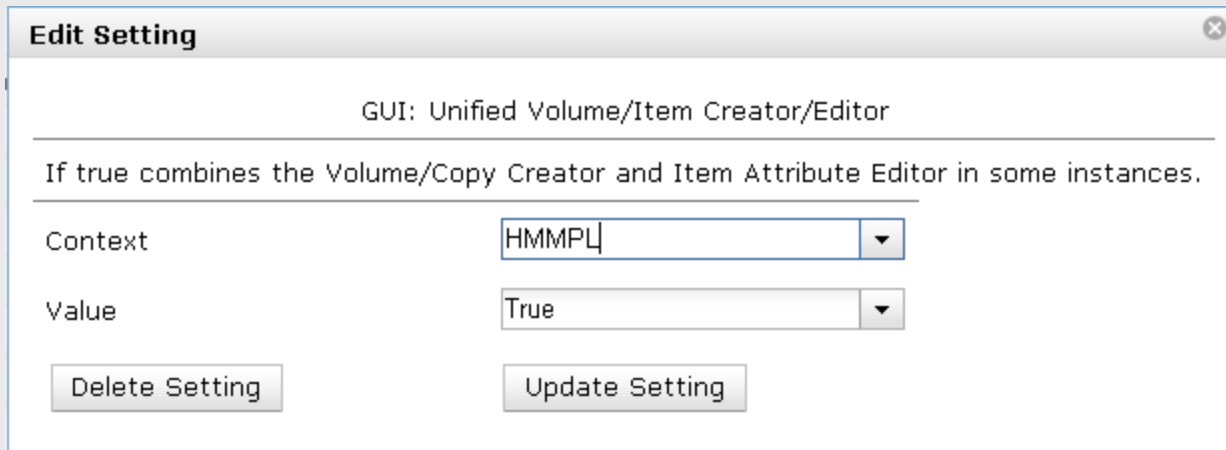
Context Location * Indicates the setting is not inherited from the parent o

Edit	Setting	Context	Value
Edit	GUI: Suggest sumix field on patron registration		
Edit	GUI: Toggle off the patron summary sidebar after first view.		
Edit	GUI: URL for remote directory containing list column settings.		
Edit	GUI: Unified Volume/Item Creator/Editor	HMMPL	False
Edit	GUI: Work Log: Maximum Actions Logged		

Click **Edit** next to that line.

The Unified Volume/Copy Creator

- Set the Value to True.
- If you want to switch back to the separate Volume Copy and Copy Creator, set it to False.



Edit Setting [Close]

GUI: Unified Volume/Item Creator/Editor

If true combines the Volume/Copy Creator and Item Attribute Editor in some instances.

Context: HMMPL [v]

Value: True [v]

[Delete Setting] [Update Setting]

- Click Update setting.

The Unified Volume/Copy Creator

From Holdings Maintenance, the Unified/Copy Creator/Editor opens for:

- Add Volumes
- Add Items
- Edit Items
- Replace Barcode

The Unified Volume/Copy Creator

A few other things to know about the Unified Volume/Copy Creator

- You have to add a barcode before you can apply templates or make item edits.
- There's no cancel button, so you have to use Ctrl +W or the little red x (NOT the bigger red X) to close the tab.
- Depending on your screen resolution, you may find you'll have display issues such as the Copy Notes button being cut off.
- It doesn't open from the Item Status screen, from there you get the separate Volume and Copy editors and Replace Barcode

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