

Processes for Cancellations Lincoln Land Community College

Monographs

(Acquisitionist)

1. Place order through vendor #1
 - a. Vendor #1 cancels order
 - b. Mark and Generate the cancellation in Voyager Acquisitions at the line item level
2. Research prices/vendors and communicate with appropriate librarian
3. Place order through vendor #2
Create new purchase order using the same bib record as initial order
 - a. Vendor #2 cancels order
 - b. Mark and Generate the cancellation in Voyager Acquisitions at the line item level
4. Repeat as necessary

When last effort is exhausted:

5. Change location code to "Cancd" in MFHD using Voyager Cataloging
 - a. Open Acquisitions and Cataloging clients
 - b. From the appropriate purchase order/line item, click the "MARC" button. This will pull up the associated bib record in Cataloging.
 - c. In Cataloging, view the "System" tab on the bib record to verify that bib record is suppressed from OPAC
 - d. Click "Get Holdings" button
 - e. Change the 852 \$b information to "Cancd"
 - f. Click "Save to Database" button
 - g. Check work by viewing hierarchy

Standing Orders

*Note: After cancelling with the vendor, we will keep and pay for any volumes received within 30 days after the cancellation date. Any volumes received after the 30 day period will be returned to the vendor without payment.

(Acquisitionist)

1. Cancel order with the appropriate vendor (state the above 30-day policy)
2. At "Subscription Maintenance"
 - a. At "Component Details" tab
 - i. Add a note stating "Subscription canceled <DATE>. init/date"
 - ii. Make sure that the claim interval is 30 days and that the 'don't claim' box is UN-checked
 - b. At "Component Pattern" tab (either predictive or non-predictive)
 - i. Add issue called "CANCELED"
 - ii. Make expected date for this added issue, today's date
 - iii. Note: The added issue will move past the claim interval and into the problems list triggering the next series of steps to complete the cancellation in Voyager.
3. At the Purchase Order
 - a. Add a note at the PO level (not the item level) stating "Subscription canceled <DATE>. init/date"

(Serialist)

Once the CANCELED issue appears in the problems list:

4. At "Serials Check-in"
 - a. Check in the CANCELED issue so that it appears in the "Serials History"
5. At "Subscription Maintenance"
 - a. At "Predictive component pattern" tab
 - i. Close pattern
 - OR
 - b. At "Non-predictive component pattern" tab
 - i. Make sure no issues remain in the pattern list (remove issues)
6. At the Purchase Order
 - a. Complete the PO
7. In the MFHD
 - a. Update holdings to reflect last received issue (if not already done)
 - b. Add a staff note (\$x) to the 852 stating "Subscription canceled <DATE>."

Periodicals

(Acquisitionist)

1. Cancel order with the appropriate vendor (find out when current subscription cycle will end)
2. At "Subscription Maintenance"
 - a. At "Component Details" tab
 - i. Add a note stating "Subscription canceled after <DATE>. init/date"
 - b. At "Component Pattern" tab (either predictive or non-predictive)
 - i. Change first issue that we should NOT receive (first issue after the cancellation) by adding "CANCELED" before the issue information
 - ii. Note: The changed issue will move past the claim interval and into the problems list triggering the next series of steps to complete the cancellation in Voyager.
3. At the Purchase Order
 - a. Add a note at the PO level (not the item level) stating "Subscription canceled after <DATE>. init/date"

(Serialist)

Once the CANCELED issue appears in the problems list:

4. At "Serials Check-in"
 - a. Change issue by deleting the issue information and leaving CANCELED
 - b. Check in the CANCELED issue so that it appears in the "Serials History"
5. At "Serials History"
 - a. Un-display all issues from the OPAC
6. At "Subscription Maintenance"
 - a. At "Predictive component pattern" tab
 - i. Close pattern

OR

 - b. At "Non-predictive component pattern" tab
 - i. Make sure no issues remain in the pattern list (remove issues)
7. At the Purchase Order
 - a. Complete the PO

8. In the MFHD
 - a. Close/update holdings and fixed fields
 - b. Remove shelving statements (because all physical issues will be moved from current shelving to periodicals stacks)
 - c. Add a staff note (\$x) to the 852 stating "Subscription canceled after <DATE>."
 - d. Change all retention statements to staff notes stating "Formerly retained <time period>." (make this its OWN \$x apart from the 'subscription canceled after' staff note)
9. In OCLC
 - a. Close/update holdings and fixed fields in the local holdings record
10. Stacks maintenance
 - a. Print pull slip requesting that:
 - i. Issues on the current periodicals shelving be moved to the periodicals stacks
 - ii. Remove label from current periodicals shelving

Special Case: "Retention Statement" titles (see 8d above)

1. Run report yearly during Christmas Break finding all MFHD staff notes beginning with "Formerly"
2. Use this list to identify titles needing issues discarded due to old retention statements
3. Update holdings in Voyager and OCLC
4. Print pull slips for stacks maintenance

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