Bound-With Categories:

1. **All serial bound volume** (contains only serial issues): if unable to separate/rebind a bound serial volume into separate bibliographic components (generally resulting from a title change), then perform BW process (e.g. parent record is ………)

2. **All monographic bound volume** (contains only monographs): perform BW process (e.g. parent record is Peonies in the Garden, o55164374)

3. **Mixed bound volume** (contains at least one monograph and one serial): perform BW process only on the monographs; add marc holdings for serial, indicating in |z note location of serial issue that is bound in the mixed bound volume (e.g. ……….). For SuDoc items, add ‘(year)’ to SuDoc item line, and add report # and year to MARC holdings.

J-Client Bound-With Procedure

Create copy 1 item line for parent item. If this is a bound with that has to be created for a serial title change, simply add an item line to the old title. If the volume represents multiple report numbers or parts, make sure the parent call number lists the range of numbers. Add it with an actual barcode in the item line. Note the title control number. You will use that later to quickly call up the parent record.

1. VERY IMPORTANT: BEFORE you create the child record or item line, you MUST change the preferences. Go into the Call number and Item Maintenance Icon and modify the preferences in the Behavior tab so that an automatic X call number is generated, and no copy is added (unclick the Add item when adding new call number box, and unclick the Add item box immediately below). Also check the box that gives the option to Auto-generate temporary XX call numbers.

2. Add the item line to the child cataloging record. It should look like this when created:

   call number:       XX(1744339.1)         class scheme: SBT, LC or SUDOC
   call library: LSM

   Note you will see a new item line with an XX call number and no barcode. This is a copy zero item line.

3. Add copy zeroes to all of the children that need to be added to the family.

4. After all the copy zeroes are entered, click on the Bound-with icon, and call up your first child record. I usually use the title control number for accuracy. Click the button at the bottom of the screen labeled “Add to tree.” The complete holdings of that record will then be transferred to the Bound-with tree pane. Click
on the copy zero that you need to link and click on the “Retain for Linking button.” The copy zero item line will now be bold and italicized.

5. If you have any more children to be linked repeat the searching, adding to tree, and retaining for linking until all children have been added to the tree, and the copy zero items have all been selected.

6. Lastly, call up the parent title and add that to the tree.

7. Click on the Link button to link all children to the parent simultaneously.

8. A Bound-With Operation Results pop-up window will show that you have successfully linked the parent and the children. Click the OK button. The Bound-with tree pane will now show the parent with the children listed in blue underneath.

9. Now call up your “children” by title control number, and remove any copy 1s necessary. Except in the case of a title change or multiple copies, the child’s record might have no copies. There may only be a copy zero item line.

10. If you search a child title in Webcat, it will be listed as “Bound in: Parent title”, and it will have the parent’s call number.

11. Another way to check: In Workflows, call up the parent record or the child record, and hit the Bound-With bar in the item screen. It will list the parent and all of the children. You will get a listing with the parent on top, and the children in XX call number order on the bottom.

12. If you are creating a bound-with in a New Title/Old Title situation, be sure to add the other volumes FIRST with the Preferences set in the normal way, then change the preferences (as in step 2) and add the child. Situations with more than one child on a serial record may have to be handled with a MARC Holdings note instead of the Bound-with procedure.

13. Be sure to change the preferences back to normal when you are done.

14. If you are removing a parent-child group from IRIS, you MUST remove ALL children before removing the parent. Workflows will not allow you to remove any parent records that still have children attached. In other words—no orphans allowed.

15. Be sure to check the Marc Holdings if you are working on serial titles. It may be necessary to change them manually to accurately reflect the titles holdings if the Bound-with is caused by a title change.

16. Be sure to check for purchase orders if you are performing a bound-with on a serials title change. Confer with the Serials team if you find an order—we would not want to unintentionally transfer a purchase order to the wrong record.

17. Have a cup of coffee—you’ve earned it.

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