

Collapsing Serial Hierarchy

SobekCM provides robust support for handling sets of materials that are hierarchically organized, with this support most often used for serial hierarchy. Support for serial hierarchy is explained in the SobekCM for Curators and Collection Managers Trainings (<http://ufdc.ufl.edu/l/IR00003545/00003>) and in the documentation on adding new serial items (<http://dloc.com/AA00011590/>).

In some cases, a set of materials or serial may be accidentally loaded as separate items when it should be loaded as a serial. In most cases, the items need to be collapsed into a single serial item. Doing so ensures that users can find the full serial set, and ensures ease when adding new items to the existing serial item-set. Please note: not all serial items should be automatically collapsed (e.g., a serial that is part of an archival collection), so any work of this sort requires consultation with the Curator.

Collapsing items into a single serial is often done by the Digital Production Services group as part of the digital curation processing. This is because collapsing is only done if there was an error or confusion in the processing, and so collapsing is an uncommon workflow and one best done by a centralized support provider. Further, access to the online server files makes this process much easier and faster, and so DPS has the best access for this work.

To collapse items into a serial record:

- Find the best item for use as the primary item. This is where the other serial items will be collapsed into. This is often the oldest item, or it may be that there is an item with some of the serial items attached, whereas the others are single free-floating items.
- Identify all of the existing items that need to be collapsed into the primary item.
- Change the status to “private” for all of the items to-be-collapsed (not the primary item).
- Update the records for all of the items to-be-collapsed to state:¹
 - Item loaded on DATE and made DARK on DATE after this single item was collapsed into the serial-set record here: PERMANENT LINK TO TOP LEVEL OF PRIMARY SERIAL ITEM
- Add the existing item information to create VIDs on the primary item (documentation on adding new volumes: <http://dloc.com/AA00011590/>)
- Copy the files for all of the existing items from the online server files into a processing folder on the SAN
 - Rename the folders to the new BIBID_VID
 - Load the new files to the primary item
- Verify the loaded files online in the serial set with the collapsed hierarchy.
- Verify that the new/renamed BIBID_VIDs are archived under the new BIBID_VID
- For the existing items that have now been collapsed, return to those items and change the status from “private” to DARK

¹ See examples in: <http://ufdc.ufl.edu/l/AA00017119/00007>