Serials – Tips and Workflows

- Claims
- Auto-opening issues
- Ending subscriptions
Serials – Tips and Workflows

Claims
Serials - Claims

Dependencies

- Non-arrival of an issue by its ‘Expected Date of Arrival’
- Automatic claim flag in the subscription record / ensuing dates for claims
- Vendor address set-up
Serials - Claims

Dependencies

- Non-arrival of an issue by its ‘Expected Date of Arrival’
Serials - Claims

Dependencies

- Automatic claim flag in the subscription record / ensuing dates for claims
Serials - Claims

Dependencies

- Vendor address set-up
Serials - Claims

Two ways to claim serial issues:

- Interactive (singular) claiming
- Automatic (batch) claiming
Serials - Claims

Singular claiming

- Highlight item
- Click ‘[C] Claims’ in Items section of left pane, or ‘Claim’ on right side of screen
Serials - Claims

Singular claiming

- Click ‘New’ on the right side of the claim list display
Singular claiming

- The bottom portion of the screen becomes active
- Fill out applicable fields, and click ‘Add’
- Depending on settings in the Vendor record, a claim letter may be generated

<table>
<thead>
<tr>
<th>Serial Claim Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Claim Text:</td>
</tr>
<tr>
<td>Claim Date: 04/05/2013</td>
</tr>
<tr>
<td>Claim Reply:</td>
</tr>
<tr>
<td>Reply Date: 00/00/0000</td>
</tr>
<tr>
<td>Expected Arrival Date: 00/00/0000</td>
</tr>
<tr>
<td>Format: 01</td>
</tr>
</tbody>
</table>

[Add]
Serials - Claims

Batch claiming

- Print Claim Letters/Report (serial-44) can be used to generate claim letters or claim list
- Services | Serials | Print Claim Letters/Report (serial-44)
- Letters are only generated for items whose subscriptions have the Claim flag set to Yes will be claimed
- Reports can be generated for items whose subscriptions have the Claim flag set to Yes or Ignored
Serials - Claims

Batch claiming

- Print Claim Letters/Report (serial-44)
Serials - Claims

Batch claiming

- Print Claim Letters/Report (serial-44) fields
  - Input File – Enter the input file if using one
  - Input File Type – If using an input file, indicate if file contains BIB or ADM record numbers
  - Output File – Enter the name of the file, which will be used later to retrieve the file later in the Task Manager
  - Output Type – Select what type of report to be run: Letters/Reports
  - Letter/Report Format – Depending on what output type is chosen, select the appropriate format from one of the two fields
  - Sort Report Output By – If a report option was selected, choose how the report should be sorted
  - Sublibrary – Select sublibrary where appropriate
  - Vendor Code – Select the Vendor Code from the list (using the ellipse button) only in cases when claiming for a single vendor
  - No. of Claims Filter – Select the number of claims from the drop-down menu
Serials - Claims

Batch claiming

- Print Claim Letters/Report (serial-44) fields (cont.)
  - Update Database – Select Yes or No depending on if you wish to have the database register a claim for the item. Not updating the database allows for a preview of those items to be claimed. **Note: updating the database will register a claim on each item, similar to the entries made in the singular claiming process
  - Item Status – Filter by item status if desired
  - Item Process Status – Filter by item process status if desired
  - Create Triggers – Select Yes or No to create triggers
  - Triggers Department – If Create Triggers is set to Yes, determine for which department to register the triggers
  - Expected Arrival Date – The service will take into account issues which were expected to have arrived up to this date. The default is today’s date.
Serials - Claims

Batch claiming

- Print Claim Letters/Report (serial-44) Letters

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Serial Claim Letter

8august Library
Jamestown College
6070 College Lane
Jamestown, ND 58405

Ebsco
2801 Youngfield St. Suite 120
Golden, CO
US
80401-2284

Dear Sir/Madam,

The following item, which was expected to arrive by EDA: 07/21/2012 has not yet been received. Please send it immediately, or return this form with your comments.

Thank you in advance

Bibliographic Information:


Issue Information:

Description: v.43 no.4(2012:July)

Additional Note to 

# Serials - Claims

**Batch claiming**

- Print Claim Letters/Report (serial-44) Report

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### Serials Claim Report

<table>
<thead>
<tr>
<th>Sorted By:</th>
<th>TIT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>System No.</td>
</tr>
<tr>
<td>American libraries. [Chicago] American Library Association</td>
<td>2475814</td>
</tr>
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</table>
Serials - Claims

Updating claims

- Highlight item
- Click ‘[C] Claims’ in Items section of left pane
Serials - Claims

Updating claims

- Each claim is listed in the upper pane
- Information can be updated in the lower pane
- Click ‘Update’ to save
Serials – Tips and Workflows

Auto-Opening Expected Issues
Auto-Opening Issues

Expected issues can be opened manually

- Go to the Pattern record, Level-X tab
- In the lower pane select tab 5. Expected Schedule
- The next cycle of issues to be opened is listed; Click ‘Open Items’
Auto-Opening Issues

Expected issues can be opened manually

- Issues are opened, and available for check-in
Auto-Opening Issues

Open Expected Issues (serial-13)

- Issues can be opened for all active serial subscriptions using the Open Expected Issues (serial-13) service
- Services | Serials | Open Expected Issues (serial-13)
Auto-Opening Issues

Open Expected Issues (serial-13) fields

- Input File – Enter Input File if one is being used
- Output File – Enter the name of the file, which will be used later to retrieve the file later in the Task Manager
- Open Expected Issues Until – The system always opens one complete cycle of issues. It will open the cycle for all subscriptions that are active for the beginning of that cycle
- Update database – Selecting yes will open the expected issues; selecting no will provide a list or preview of which issues would be opened if yes had been chosen
- Report Format – Only one format type is currently available
# Auto-Opening Issues

Open Expected Issues (serial-13)

<table>
<thead>
<tr>
<th>Title</th>
<th>ADM No.</th>
<th>Library</th>
<th>Copy No.</th>
<th>Issue Description</th>
<th>Issue Date</th>
<th>Exp. Arrival Date</th>
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<tbody>
<tr>
<td>Journal of applied social psychology.</td>
<td>23679</td>
<td>Jamestown - Raugust Library</td>
<td>00010</td>
<td>v.43:no.1(2013:Jan.)</td>
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<td>03/03/2013</td>
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<td>03/31/2013</td>
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<td>v.43:no.4(2013:Apr.)</td>
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<td>08/31/2013</td>
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</tbody>
</table>
Ending Subscriptions
Ending Subscriptions

When ending a subscription, the following should be taken into account:

- Acquisitions Order Record
- Subscription List
- Items that have been ‘opened’ but not arrived
Ending Subscriptions

Acquisitions Order Record

- The status of the order record (if order records are used) should be updated to closed
- In the Order Status field in the lower pane, select CLS
- Click ‘Update’ to save changes
Ending Subscriptions

Subscription List

- Select tab 2. Subscription Info. (1) of the subscription list
- Update the ‘To Date’ field to the current date, to indicate the subscription is closed
- Click ‘Update’ to save the change
Ending Subscriptions

Items that have been ‘opened’ but not arrived

- In the Check In node, or the Item List node, highlight the item(s) that will not be arriving at the library
- Click ‘Delete’
Additional Documentation

Staff training page for serials:

http://www.odin.nodak.edu/node/51

Workgroups page for serials:

http://www.odin.nodak.edu/node/44