Aleph Serials Tips and Workflows



Serials – Tips and Workflows

- Claims
- Auto-opening issues
- Ending subscriptions

Serials – Tips and Workflows

Claims

Dependencies

- Non-arrival of an issue by it's 'Expected Date of Arrival'
- Automatic claim flag in the subscription record / ensuing dates for claims
- Vendor address set-up

Dependencies

Non-arrival of an issue by it's 'Expected Date of Arrival'

ALEPH Vi	iew Utilities	Orders	*Services	Help	?					
BIB Sys No	. –			⇒	BIB= 2475914;ADM=	23671 - American I	libraries. (American Library A	ssociation.) Ye	ar: 1970.	
රී Order num	iber 💌			⇒						
*				\blacktriangleright						
친 날										
[1] Funct	tional 🔘 [2] Over	view	Exp. Arri	val	Barcode	Sublibrary	Description	Claim	Sbs	Vendor
[0] Cont	trol [Pattern HO heck In	L]	01/21/1	2	33112003056748	Jamestown - Raugust Library	v.43:no.1(2012:Jan./Feb.)		10	0058733
[P] Gi Patter	roup rns (active=1,patt	erns=1	03/21/1	2	33112003063694	Jamestown - Raugust Library	v.43:no.2(2012:Mar./Apr.)		10	0058733
Schee	dule scription List (1)		05/21/1	2	33112003076910	Jamestown - Raugust Library	v.43:no.3(2012:May/June)		10	0058733
[S] Subs [N] P	scription (copy= atterns (1)	10, 02	07/21/1	2	23671-2720	Jamestown - Raugust Library	v.43:no.4(2012:July)		10	0058733
[G] Lo	og (06/08/12) ems (70)		09/21/1	2	23671-2730	Jamestown - Raugust Library	v.43:no.5(2012:Sept.)		10	0058733
[C] C [R] R	Claims (0) Routing Lists (0)		11/21/1	2	23671-2740	Jamestown - Raugust Library	v.43:no.6(2012:Nov.)		10	0058733
[M] Iten	n List (265) Il Items History									
E [E] Item	(23671-2720, 0 listory (Last update	0 20.5 / ed							Sort O	ptions

Dependencies

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



Dependencies

Vendor address set-up

1. Vendor Info 1 2. Vendor Info 2 3. Vendor Info 3 4. Sublibraries									
Account No. (M):	DV 15576								
Account No. (S):	DV 15576								
Vendor's Bank Acct.:									
Currency 1:	USD	Currency 3:							
Currency 2:	I	Currency 4:							
Terms Sign:	-	Terms Percent:	0.00						
Order Delivery:	LI 🕨								
Letter Format:	01	Letter Send Method:	PRINT						
List Format:	01	List Send Method:	PRINT						

Two ways to claim serial issues:

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

Singular claiming

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



Singular claiming

Click 'New' on the right side of the claim list display

Claim List				X
Claim List				
Claim Date	Reply Date	Next Cla	im	
				Delete
				New
				Cancel
			-	r
,		Sort Options	-	-
Serial Claim Details				
Claim Text:				Update
Claim Date:	00/00/0000			Cancel
Claim Reply:				
Reply Date:	00/00/0000	1		
Expected Arrival Date:	00/00/0000	1		
Format:				

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

Serial Claim Details			
Claim Text:	Ι	I	Add
Claim Date:	04/05/2013		Cancel
Claim Reply:			
Reply Date:	00/00/0000	×	
Expected Arrival Date:	00/00/0000		
Format:	01		
	*		

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

Batch claiming

 Print Claim Letters/Report (serial-44)

Print Claim Lett	ers/Report (serial-44) - NDJ50	
Input File		Su <u>b</u> mit
Input file Type	BIB Record Numbers	View History
	C ADM Record Numbers	<u>C</u> ancel
Output File		Help
Output Type	Separate Letter to Vendor for each Title/SubLibrary	Add to History
Letter Format	Standard Letter	
Report Format	Title ADM No Vendor Desc Lib Subs No Issue Date EDI Batch No. of Claims	
Sort Report Output By	Title 💌	
Sublibrary		
	Jamestown - Raugust Library	
Vendor Code		
No.of Claims Filter	Any Claim	
Update Database?	C Yes	
	● No	
Item Status	Include the Following item Statuses	
	C Exclude the Following item Statuses	
	One hour reserve	
	One week	
	One week reserve	
Item Process Status	Include the following item process statuses	
	C Exclude the following item process statuses	
	ZZ (space as a value)	
	Lost	
	In house repair	
	Cataloging Dept.	
	Binding	
Create Triggers?	C Yes	
	No	
Triggers Department	Acquisitions - Firm Order	
Expected Arrival Date	04/05/2013	~

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

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.

Batch claiming

Print Claim Letters/Report (serial-44) Letters

Serial Claim Letter

Raugust Library Jamestown College 6070 College Lane Jamestown, ND 58405

Ebsco 2801 Youngfield St. Suite 120 Golden, CO US 80401-2264

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:

American libraries.. [Chicago] American Library Association.. v. ill., ports. 28 cm..

Issue Information: Description: v.43:no.4(2012:July) Additional Note to

Batch claiming

Print Claim Letters/Report (serial-44) Report

	Serials Claim Report									
Sorted By: TIT										
Title	System No.	Vendor	lssue Description	Library	Subscription No.	lssue Date	Exp. Arrival Date	Batch Claim	No. of Claims	
American journal of mental retardation :AJMR Washington, DC : American Association on Mental Retardation, c1987 v. : ill. ; 25 cm	2511050	0010179	v.117:no.4 (2012:July)	Jamestown - Raugust Library	10	07/01/2012	07/15/2012	Yes	00000000	
American journal of mental retardation :AJMR Washington, DC : American Association on Mental Retardation, c1987 v. : ill. ; 25 cm	2511050	0010179	v.117:no.5 (2012:Sept.)	Jamestown - Raugust Library	10	09/01/2012	09/15/2012	Yes	00000000	
American journal of mental retardation :AJMR Washington, DC : American Association on Mental Retardation, c1987 v. : ill. ; 25 cm	2511050	0010179	v.117:no.6 (2012:Nov.)	Jamestown - Raugust Library	10	11/01/2012	11/15/2012	Yes	00000000	
American libraries [Chicago] American Library Association	2475914	0058733	v.43:no.4	Jamestown - Raugust	10	07/01/2012	07/21/2012	Ves	იიიიიიიიიიიიიიიიიიიიიიიიიიიიიიიიიიიიიიი	

Updating claims

- Highlight item
- Click '[C] Claims' in Items section of left pane

친 😰 🗗 🕇 🕅		1. All 2. Expected	/Not Arrived							
● [1] Functional ○ [2] Overview		Exp. Arrival	Barcode	Sublibrary	Description	Claim	Sbs	Vendor	Arrival	
[] [O] Control [Pattern HOL]		01/21/12	33112003056748	Jamestown - Raugust Library	v.43:no.1(2012:Jan./Feb.)		10	0058733	01/26/12	•
[P] Group Patterns (active=1.patterns=1		03/21/12	33112003063694	Jamestown - Raugust Library	v.43:no.2(2012:Mar./Apr.)		10	0058733	03/15/12	
Schedule		05/21/12	33112003076910	Jamestown -	v.43:no.3(2012:May/June)		10	0058733	06/08/12	
□ [S] Subscription (copy=10, 02		07/21/12	23671-2720	Jamestown - Raugust Library	v.43:no.4(2012:July)	04/05/13	10	0058733		
[N] Patterns (1) [G] Log (04/05/13)	ľ	09/21/12	23671-2730	lamestown -	v 43·no 5(2012·Sept)		10	0058733		J
[I] Items (70) [C] Claims (1) [R] Routing Lists (0)		11/21/12	23671-2740	Jamestown - Raugust Library	v.43:no.6(2012:Nov.)		10	0058733		
[M] Item List (265) [A] All Items History					Sort Options					•
[E] Item (23671-2720, 020.5 <i>F</i>	_									
[Z] Circulation Log ()	1. Info List 2. Arrival Form 3. Serial Levels									
Claims (1)		Item Bib Info								
Bibliographic In(f)o.					-					

Updating claims

- Each claim is listed in the upper pane
- Information can be updated in the lower pane
- Click 'Update' to save

2 * 7 8 8 8	Claim List			
● [1] Functional ○ [2] Overview	Claim Date	Reply Date	Next Claim	
	04/05/13 Didn't arrive		05/05/13	Delete <u>New</u>
[L] Subscription (copy=10, 02 -[N] Patterns (1) -[G] Log (04/05/13) -[I] Items (70)			Sort Options	· ·
[C] Claims (1) [R] Routing Lists (0)	Serial Claim Details			1
□ [M] Item List (265)	Claim Text:	Didn't arrive		Update
[H] History (Last updated 04/0 [7] Circulation Log ()	Claim Date:	04/05/2013	 則▶	Cancel
[U] Circ. Summary Claims (1)	Reply Date:	04/05/2013		
— Routing Lists (0) — Bibliographic In(f)o. — [T] Trigger List	Expected Arrival Date:	07/21/2012		

Serials – Tips and Workflows

Auto-Opening Expected 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'



Expected issues can be opened manually

Issues are opened, and available for check-in



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)

Open Expected		
Input File	I	Submit
Output File		View History
Open Expected Issues Until	00/00/0000	Cancel
Update database	C Yes	Help
	(● No	Add to History
Report Format	Title Rec. No. Sublibray Copy No. Desc. Date Arrival	

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

Open Expected Issues (serial-13)

Open Expected Issues and Publication Schedules

Date To:

12/31/2013

Title	ADM No.	Library	Copy No.	Issue Description	lssue Date	Exp. Arrival Date
Journal of applied social psychology.	23679	Jamestown - Raugust Library	00010	v.43:no.1(2013:Jan.)	01/01/2013	01/31/2013
Journal of applied social psychology.	23679	Jamestown - Raugust Library	00010	v.43:no.2(2013:Feb.)	02/01/2013	03/03/2013
Journal of applied social psychology.	23679	Jamestown - Raugust Library	00010	v.43:no.3(2013:Mar.)	03/01/2013	03/31/2013
Journal of applied social psychology.	23679	Jamestown - Raugust Library	00010	v.43:no.4(2013:Apr.)	04/01/2013	05/01/2013
Journal of applied social psychology.	23679	Jamestown - Raugust Library	00010	v.43:no.5(2013:May)	05/01/2013	05/31/2013
Journal of applied social psychology.	23679	Jamestown - Raugust Library	00010	v.43:no.6(2013:June)	06/01/2013	07/01/2013
Journal of applied social psychology.	23679	Jamestown - Raugust Library	00010	v.43:no.7(2013:July)	07/01/2013	07/31/2013
Journal of applied social psychology	23679	Jamestown -	00010	v 43:no 8(2013:Aug.)	08/01/2013	08/31/2013

Serials – Tips and Workflows

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

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

친 꽃 1월 1년 1월 1월 1	Order List											
● [1] Functional ○ [2] Overview	Order no.	Vendor	Sub-lib	Status	Inv St	Arr St	Туре	Budget	Local price			
[L] Order List (1)	2	0032379	NDJMA	SV	None	None	S		150.00	*	<u>A</u> dd	
[] [0] Order (2 - 0032379/Sent 1 [E] Encumber											D <u>u</u> plicate	
[1] Invoice [A] Arrival											Delete	
[S] Items/Subscriptions (0 sub [C] Claims (0)											Print/Cancel	
[G] Order Log (04/05/13)										÷	Send	
[T] Trigger List												
	1. Order Display	1. Order Display 2. General 3. Vendor 4. Quantity and Price										
	Order Number:	Γ	2	Orc	der Status:	þis					<u>U</u> pdate	
	Additional Order 1	No.1:		Add	ditional Order No.2	:					Save Def.	
	Order ISBN/ISSN	:	0002-9769					Þ			<u>R</u> efresh	
	Open Date:		04/05/13	ERM	MID:						Cancel	
	Order Date:	Γ	04/05/13	Orc	der Group:		[►				
I I		Г	DDN			04/05/1	12	-				

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

친 날 번 면 물 읆	Subscription List					_					
● [1] Functional ○ [2] Overview	Seq. From	To Subli	brary Vendor	Call number							
[0] Control [Pattern HOL]	10 04/04/95	12/31/20 NDJI	MA 0058733	020.5 Am3a	Dejete						
[K] Check In						-11					
[P] Group					Add						
Patterns (active=1,patterns=1					Duplicate						
Schedule						-11					
[L] Subscription List (1)					- Print						
[N] Patterns (1)	J					-11					
[G] Log (04/05/13)		Sort Options									
[I] Items (76)											
[C] Claims (1)		_									
[R] Routing Lists (0)	1. Info. Lit <u>2. Subscription Info.</u>	(1) 3. Subscription Info. (2)	4. HOL Links								
🖻 [M] Item List (271)											
[A] All Items History	Sublibrary:	AMEDIN	•		Update						
E [E] Item (23671-2720, 020.5 #											
[H] History (Last updated 04/0	From Date:	04/04/1995	04/04/1995								
[2] Circulation Log ()	To Date:	12/31/2020	12/31/2020								
Claims (1)		20									
Routing Lists (0)	Item Status:	20									
Bibliographic In(f)o.	Collection:	SER	SER								
Im [T] Trigger List	Call Number Type:	1	Temp. Location								
	Call Number:	\$\$h020.5\$\$iAm3a									

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: <u>http://www.odin.nodak.edu/node/44</u>