



# Staff User's Guide – Items

Version 23

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# 1 Items Overview

In ALEPH, "Item Record" refers to the physical entity to which a single barcode (changeable identifier) is related.

Item records are required for circulation activities and for serials control. Each physical copy in the library must have an item record if it is going to be circulated, and it must have an item record for serials check-in.

Item records are dealt with in all the GUI modules. In the Acquisitions module, items can be added when an order record has been selected. In this case, a link from the item record to the order is automatically created.

In the Serials function of the Acquisitions/Serials module, item records are dealt with in the context of serials handling.

In the Circulation module an items list can be used to place a hold or photocopy request; display loan information; to register that a loaned item was lost, and so on. The Circulation module includes utilities for changing item status and/or location (permanent or temporary) and for restoring an item to its permanent status and/or location.

The Fast Cataloging utility in Circulation creates a bibliographic record and an item record to facilitate loans on the fly of items that have not yet been registered in the system.

The most comprehensive functionality for items is available from within the Cataloging module. This chapter presents items control as reflected in Cataloging.

Item records are linked to ADM records and cannot exist without an ADM record. Each item is identified by an ADM record number and a sequence number. Each item must also have a unique identifier in the barcode field.

Item records can also be linked to HOL records, through the Hol. Link field in the item record. If this link is present, the location information of the item can be managed by the HOL record. This record contains the item's location, collection and sublibrary. In this case, modifying the HOL record also modifies the location information in the item record.

Note that "Call Number" and "Location" are often used interchangeably.

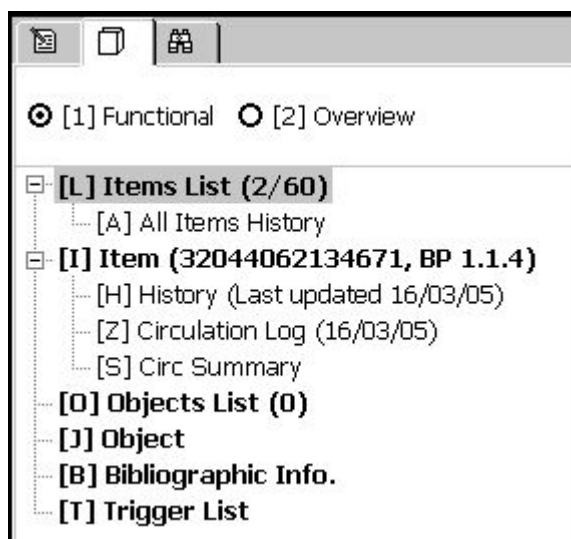
The HOL record fields are copied to the item record (first location) as follows:

- 852 first indicator -> Location Type
- 852 b -> sublibrary
- 852 c -> collection
- 852 h, etc. -> Call number
- 852 t -> copy number (if subfield t contains a single number)

Item record fields can be indexed in the BIB library. This is done by "adding" the item records to the bibliographic record at the time of indexing, through the ALEPH Expand feature (`tab_expand`), and defining the expanded fields for indexing (`tab11_acc`, `tab11_word`, `tab11_ind`). For this reason, whenever the DESCRIPTION, INVENTORY-NUMBER, CALL-NO-TYPE, CALL-NUMBER, CALL-NO-TYPE-2, CALL-NUMBER-2, MATERIAL, SUBLIBRARY, COLLECTION, PROCESSING STATUS or ITEM STATUS is updated, the bibliographic record is re-indexed.

## 2 Items Working Modes

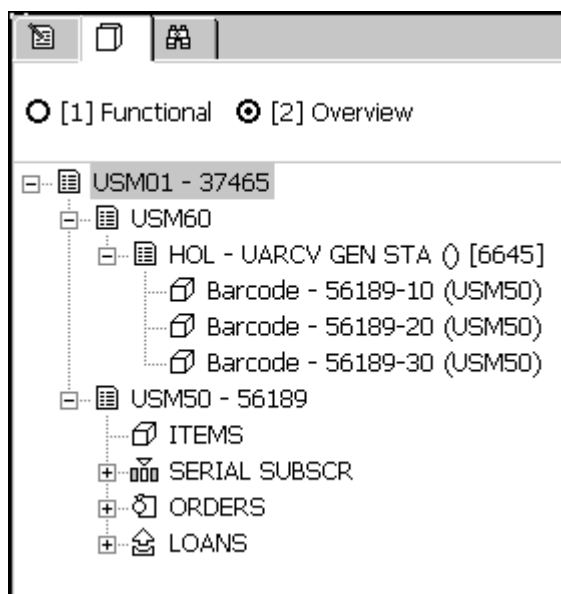
The Items function is divided into two working modes: **Overview** mode and **Functional** mode. Each mode is selected by clicking one of the two buttons in the navigation pane.



### 2.1 Overview Mode

The Overview mode displays a tree of the records in the system that are related to an item, with details for each of the records. In this mode records can be "pushed" from one module or functionality to another. The Overview mode is comprised of two panes. The navigation pane, which contains the Overview Tree, and the Record Bibliography pane.

**The Navigation Pane** displays the Overview Tree, which shows the records in the system that are related to an item.

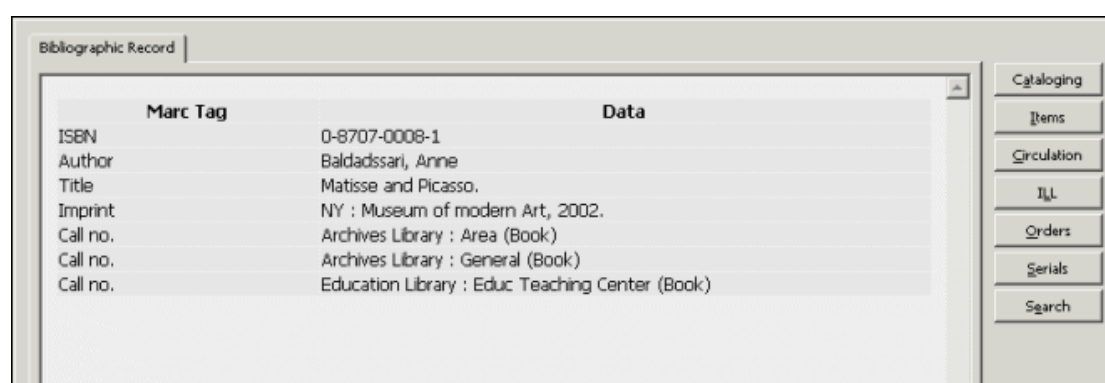


For example, it displays the bibliographic record, the holdings record and the administrative record. These can be further sub-divided into: Items, Serial Subscriptions, Orders and Loans.

Highlighting an item record in the Overview Tree will display its details in the Record Details pane. The system librarian formats these details.

Highlighting a BIB record node in the Overview Tree and clicking **Cataloging** transfers the highlighted BIB record to the Cataloging module and will activate the HOL Records tab in the lower pane. The HOL Records tab lists the holdings records linked to the record displayed in the Catalog Editor.

Highlighting a record in the Overview displays its details in the Record Details pane as follows:



The details of each record may be modified in the relevant module by selecting one of the following buttons appearing on the right side of the pane.

### Catalog Record

Click **Catalog Record** to edit a highlighted record in the Overview Tree.

## Items

Click **Items** to modify an item highlighted in the Overview Tree.

## Circulation

Click **Circulation** to transfer a highlighted item in the Overview Tree to the Circulation module to manage related circulation functions.

## ILL

Click **ILL** to transfer a highlighted item in the Overview Tree to the ILL module to edit the ILL request allocated to this item.

## Acquisitions

Click **Acquisitions** to transfer a highlighted item in the Overview Tree to the Order List display in the Acquisitions/Serials module. This will enable the user to view and manage related Serials functions.

## Serials

Click **Serials** to transfer a highlighted item in the Overview Tree to the Serials function in the Acquisitions/Serials module. This will enable the user to view and manage related Serials functions.

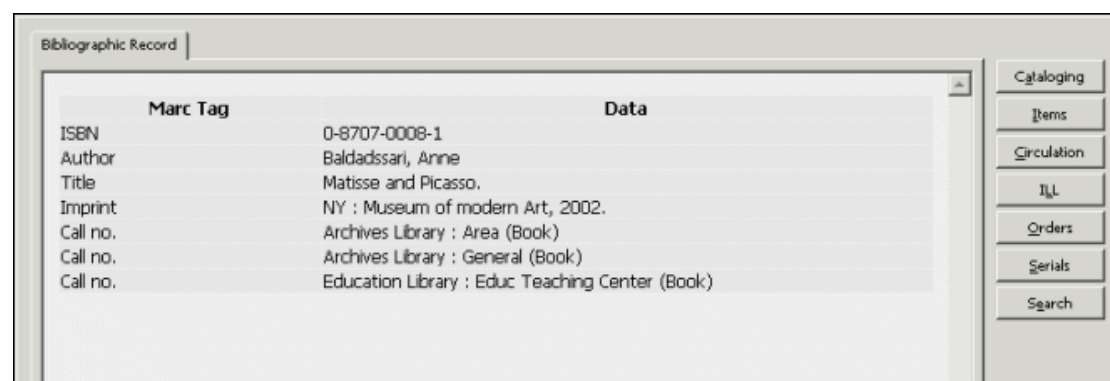
## Push to Search

Click **Push to Search** to transfer a highlighted record to the Search function.

## 2.2 Functional Mode

The Functional mode provides access to various items functions, such as creating a new item or updating the details of an existing item. In addition, this mode displays various items details.

The Functional mode displays the Item Tree, which is comprised of four roots and three nodes (which display corresponding panes when selected), as follows:



The screenshot shows a window titled "Bibliographic Record". It contains a table with two columns: "Marc Tag" and "Data". The table lists the following information:

Marc Tag	Data
ISBN	0-8707-0008-1
Author	Baldadssari, Anne
Title	Matisse and Picasso.
Imprint	NY : Museum of modern Art, 2002.
Call no.	Archives Library : Area (Book)
Call no.	Archives Library : General (Book)
Call no.	Education Library : Educ Teaching Center (Book)

To the right of the table is a vertical sidebar with several buttons: "Cataloging", "Items", "Circulation", "ILL", "Orders", "Serials", and "Search".

## Items List

Displays all the items associated with a bibliographic record and enables access to various Items functions.

## All Items History

Displays the log of changes made to item records.

### **Item**

Displays details regarding a specific item.

### **History**

Displays the log of changes made to the highlighted item record.

### **Circ Summary**

This window displays the circulation summary of the item. The display information is divided into two tabs: The first tab is Current Summary. It consists of hold request and photo request information for the current Circulation summary. It also reports the total number of active loans, holds and photo requests.

The second tab is History Summary - counters of events for statistical use.

### **Objects List**

The Objects List displays the digital objects attached to a particular bibliographic record and enables access to various object related functions. For more information, see the Managing Digital Objects with ADAM section in the Cataloging Staff User Guide.

### **Objects**

This pane displays detailed information related to a particular digital object. Note that you will not be able to modify any of the details displayed.

### **Bibliographic Info.**

Displays bibliographic details from the associated bibliographic record.

### **Trigger List**

Displays a list of triggers related to a record.

## **3 Retrieving Item Records**

The items records of a bibliographic record can be accessed using:

- The Item Bar
- The Search Tab
- The Cataloging Record Manager
- The Overview Mode


### **3.1 The Item Bar**


The **Item Bar** in the Cataloging and Circulation modules serves to retrieve item records located on the server and displays them in the Items List tab in the upper pane.

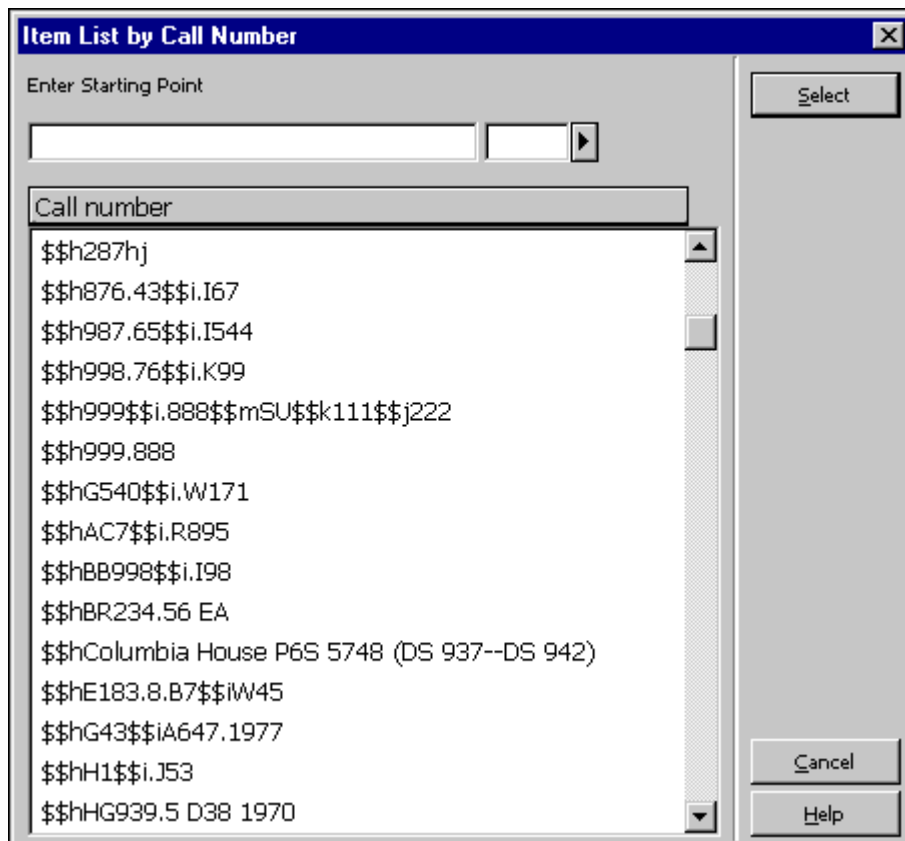
The options for retrieval are:

- **BIB system Number:** Enter the bibliographic record's system number.
- **ADM system Number:** Enter the administrative record's system number.
- **Barcode:** Enter the record's barcode.
- **Call Number:** Enter the record's call number.
- **Title:** Enter the record's title.



After entering the information (barcode, title, and so on) click . A list of items will be displayed in the Items List tab.

You can also retrieve items by clicking the **List** button . The **Item List by Call Number** window will be displayed.



Highlight a Call Number and click **Select**. A list of items for the administrative record that was found will be displayed in the Items List tab in the upper pane.



Seq	B-C	Sublibrary	Description	Call number	Collection	Status	Note	Loans
130	B45276	Education Library	v.1:no.1-12(2 002:Jan.-Dec.)			Sent to binder		0
140	54317-1 40	Education Library	v.2:no.1(2003 :Jan.)			One Hour Loan		1*
150	54317-1 50	Education Library	v.2:no.2(2003 :Feb.)			Not arrived		0
160	54317-1 60	Education Library	v.2:no.3(2003 :Mar.)			Not arrived		0
170	54317-1 70	Education Library	v.2:no.4(2003 :April)			Not arrived		0
180	54317-1	Education	v.2:no.5(2003			Not arrived		0

Sort Options: Vol./Desc./Library

### Note

If the call number is not a unique number, the system will retrieve the first item record that matches the selected number.

The Item bar contains two other options:

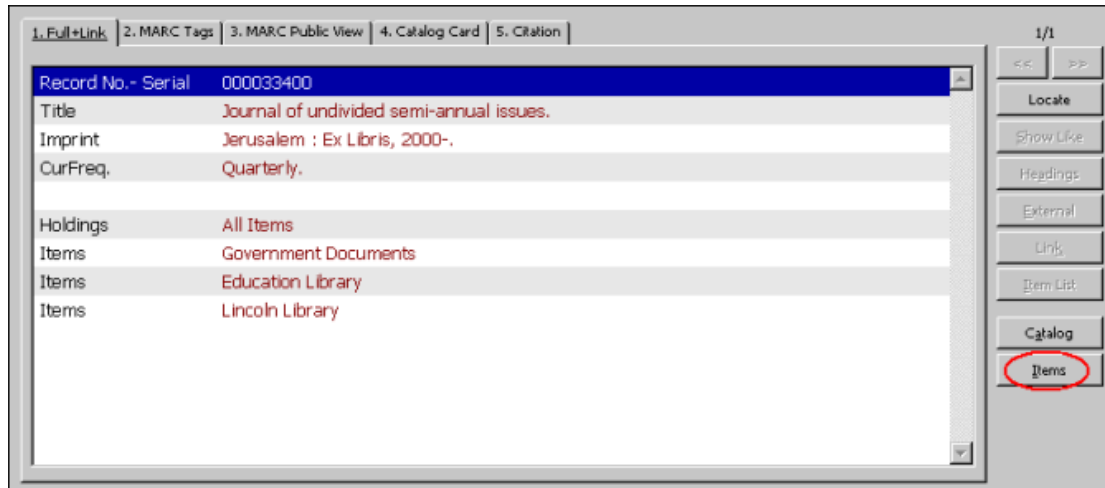
- Clear Item , to clear a loaded item and empty the item tree and its panes.
- Edit BIB Record , to display the item's BIB record in the Cataloging tab in Edit mode.

## 3.2 The Search Tab

The **Search Tab** is available in Acquisitions/Serials, Cataloging and Circulation. The Search function provides both simple and sophisticated searching for records.

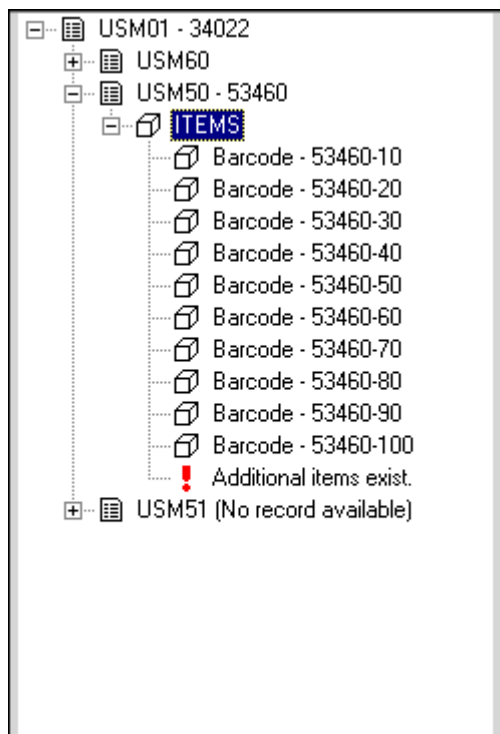
There are two ways to find records in the Search tab. You can either search (Find) by keys or keywords, or you can scan (Browse) an index. Refer to the Search chapter for full details regarding the Search functionality.

When a single full record is displayed, click the **Items** button in the lower right-hand corner of the full record display pane to transfer to the **Items** function.



### 3.3 The Cataloging Record Manager

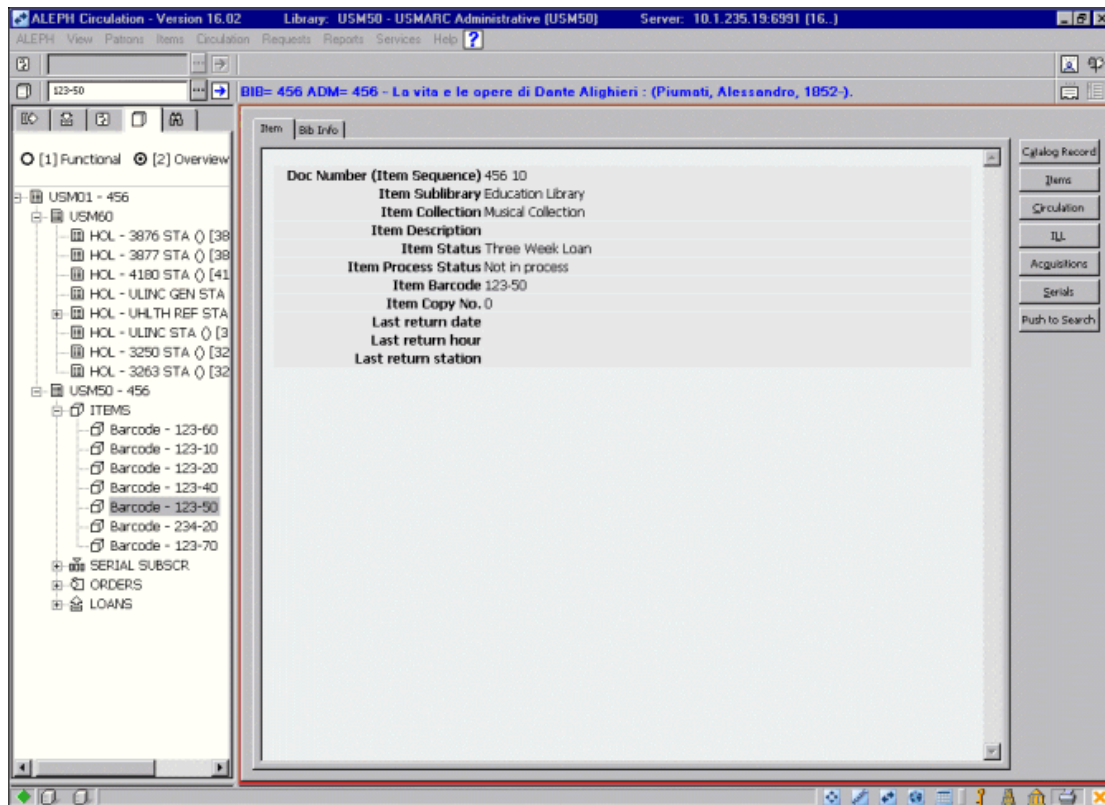
The **Cataloging Record Manager** in the Cataloging tab provides access to the **Items** tab of the Cataloging module. The Items node is displayed under the administrative library node (for example, USM50).



Double clicking the Items node enables you to view and/or add information about copies to the current record. You will be transferred automatically to the Items tab of the Cataloging module. The Items node also lists the items available for the current record. Double clicking on an item transfers you to the Items tab and enables you to view the specific copy information of the selected item.

### 3.4 The Overview Mode

When a record is displayed in one of the GUI modules, it can be "transferred" to another module or function. This can be done when the Navigation pane is in Overview mode in the Circulation and Acquisitions/Serials modules, by highlighting the relevant record in the tree and clicking the **Items** function button in the right pane.



## 4 Item List

This chapter includes the following sections:

- Item Form
- Global Changes
- All Items History/History

The Items List will be displayed after selecting the Items List root in the Item tab. The Items List, shown below, displays the items available for a particular ADMInistrative record and enables access to various Items functions.

### Note

In the "Loans" column, in addition to the number of loans there is an asterisk to indicate that the item is currently out on loan.

You can clear the loaded item from the Items List by selecting Items/Clear Item from the Main menu.

Seq.	B-C	Sublibrary	Description	Status	Loans
3210	1069-3210	Economics Library	v.117 no.4(2002/Winter)	Claimed	2*
3220	1069-3220	Economics Library	v.117 no.4(2002/Winter)	In-library use	7
2580	30044052253010	Humanities Library	Index v.1/45 (1886/1930)	In-library use	1*
1430	30044052251907	Humanities Library	v.1 (1886)	In-library use	2*
1520	30044052251998	Humanities Library	v.10 (1895)	In-library use	1*
2420	30044052252897	Humanities Library	v.100 (1985-1986)	In-library use	0
2430	30044052252905	Humanities Library	v.101 (1986)	In-library use	1*
2440	30044052252913	Humanities Library	v.102 (1987-1988)	In-library use	0
2450	30044052252921	Humanities Library	v.103 (1988-1989)	In-library use	0
2460	30044052252939	Humanities Library	v.104 (1989-1990)	In-library use	1*
2470	30044052252947	Humanities Library	v.105 (1990-1991)	In-library use	0

The information displayed for each item is set by the System Librarian, and can include various item record fields, such as the sequence number of the item in the administrative record; the barcode number; the sublibrary to which the item belongs; a description of the item and its loan status.

You may sort the order in which the items appear in the list according to different parameters, such as year, volume, sublibrary, collection, location, etc. The order differs whether the material type is ISSUE or other. You can manually change the order according to the options available in a drop-down menu of the Sort Options field at the bottom of the pane.

You may filter the list by year and sublibraries. To do so, click the **Filter by** button at the bottom of the Item List. To clear all filters, click the **Clear Filter** button.

### Note:

If the sort routine uses chronological or enumeration fields and those fields are empty, then the item's description field will be used instead.

**For the System Librarian:** The different options according to which items will be sorted are listed in the menu ITEM-SORT-TYPE of the Administrative library `pc_tab_exp_field.lng` table.

The options of ITEM-SORT-TYPE have to be coordinated with Column 1 of `tab_z30_sort` in the Administrative library. The `tab_z30_sort` table determines both the sort order and whether the order is ascending or descending, separately for ISSUE items and other items.

The option to be used as a default in each module is determined in `cat.ini`, `circ.ini` and `acq.ini` files.

For example:

```
ItemSortType=ITEM-1.
```

The following are the buttons available on this screen

### New

Click **New** to add a new item record. The Item Form in the lower pane will be activated.

### **Duplicate**

Click **Duplicate** to copy the highlighted item record. The Item Form in the lower pane will be activated and will display the details for you to edit. The copy will be assigned a new sequence number.

### **Delete**

To delete an item record, highlight the desired item and click **Delete**. To delete more than one item, hold down the **Shift** or **Ctrl** key to select more than a single item and then click **Delete**. You will receive a prompt asking you if you are sure you want to delete. Click **Yes**.

Note that if an item has been loaned, the item record cannot be deleted in the Items GUI. You must first delete the loan transaction in the Circulation GUI, then delete the item record in the Items GUI. You cannot delete an item record in the Circulation GUI.

However, if an item has Hold/Photocopy Requests and you try to delete the item record, an override confirmation pops up, provided that the end of the request date is later than or equal to the current date. The confirmation pop-up dialog contains the following options:

- Override only this record's requests. If any other item also has Hold/Photocopy Requests another override popup will be displayed.
- Override all Hold/Photocopy Requests. If any other item also has Hold/Photocopy Requests no message will pop up.
- Continue the deletion process while skipping this item.
- Stop the deletion process.

### **Label**

To print a label for an item, highlight the item and click **Label** (for multi line selection, use the Shift and Ctrl keys. Up to 100 items can be selected). The Item Label form opens. You can print the label or close the window. In this case, the label will automatically be saved under the file directory.

If you click the **Label** button for several items, a single print file is created containing a label for each selected item. The order of printed labels is the same as the order of the items list display (as set in the Sort Option).

Note that you can also print labels in a batch mode, using the Print Item Labels Service (item-3).

### **Global Changes**

Click Global Changes to make changes on a selected set of items. The Global Changes Form will be displayed. Changes can be made on all items in the list or on a group of items selected according to defined criteria.

## **Bind/Changes**

If the highlighted item is a serial, you can view a list of issues and select issues to bind by clicking **Bind/Changes**. Selecting issues and clicking **Bind/Changes** also allows you to perform global changes. See **Binding** on page 33 for more details.

## **Completed Vols.**

You can view or print a report for a given title, listing volumes which have all other issues checked in.

## **Refresh**

This button is used to refresh the list in order to display changes that have been made in other ALEPH modules.

## **Add to Set**

This button is used to add the selected item(s) into the private Items Set. The Items Set's items can then be offline updated by using the 'Edit Items Set Offline' utility, accessible from the Items menu.

## **4.1 Item Form**

When you click the **New** or **Duplicate** buttons on the Items list form, the Item form is activated in the lower pane-Item Information pane. This form is used for displaying, modifying/updating an item record. It has six tabs. The General Information, Serial Information, and Serial Levels tabs have the following buttons:

### **Add**

This button appears if you have selected the **New** button on the Items List form. Click **Add** to add a new item to the Items list.

### **Add Multiple**

This button is displayed if you select the **New** button or the **Duplicate** button on the Items List form. Click **Add Multiple** to add up to 100 new items to the Items list.

### **Update**

The **Update** button will save all changes you have made to the item record on the specific tab, as long as the changes were made within the time limit for editing the record.

This button does not appear if you have selected the **New** button on the Items List form.

### **Save Defaults**

When you click **Save Defaults**, the information entered in any fields will be automatically used as default values when creating new item records (until you save another setup as the default).

### **Refresh**

In order to display values that come from the counter, click **Refresh**. The values are: Call. No., Barcode and Inventory No.

## Subscr defaults

This button is used when generating a new issue item linked to a specific subscription. The button appears on the Item Information Form only if a Subscription No. resides in the Subscription No. field of the Serial Information tab.

When you click the **Subscr defaults** button, the following fields of the newly-generated item will be filled in with default data derived from the subscription: temporary location, item status, copy ID, internal note, order number, item statistic, remote storage, item sublibrary and item collection.

## Cancel

Click **Cancel** to discontinue the work in the lower pane and to return to the upper pane.

### 4.1.1 General Information (1) Tab

The screenshot shows the 'General Information (1)' tab of a library system interface. The tab is selected among six tabs: 1. Item Display, 2. General Information (1), 3. General Information (2), 4. Serial Information, 5. Serial Levels, and 6. HOL Links. The form contains the following fields and values:

Barcode:	238710-10	Item Status:	02
Sublibrary:	LAW	Item Process Status:	
Collection:	GEN	Enum. Level.1 (A)(Vol.):	
Copy Number:		Enum. Level.2 (B):	
Material Type:	ISSUE		
Hol. Link:	50079		
85X Type/Linking Number:		0	<input type="checkbox"/> Temporary Location
Call No. Type/Call No.:	1	AS.321	...
2nd Call No. Type/Call No.:			...
Description:	Vol.14 Issue.5 (May 2008)		

Select Items / Delete Items Defaults from the Main menu to clear all saved default fields.

Following is help for each field of the General Information (1) Tab.

### Note

Every item may be linked to a holdings record. If the library has opted to control the Location through the holdings record, this link enables the system to automatically update the item information: Sublibrary, Collection, Call Number Type, Call Number. In other words, the holdings record is the "master" record.

## Barcode

The Barcode information is mandatory. You can use your barcode reader to scan in the barcode. Alternately, you can leave the field blank and the system will automatically assign a number as soon as you click the **Refresh** or **Update** button.

## **Sublibrary**

The sublibrary information is mandatory. You can choose the sublibrary from the drop-down list. The specific choices available on the menu are determined by the System Librarian. Note that you may add or update an item for a library only if you have access rights to that sublibrary.

## **Collection**

The Collection information is optional. Your library may designate collections such as Maps, Oversized or 4th floor. You can choose from a list of collections that are valid for the selected sublibrary by clicking the arrow to the right of the field.

## **Copy Number**

The Copy Number field is optional. It can be used when performing Global Changes.

### **Note**

The following three fields are shared by Serials and Monographs. For a serial, these fields include Volume, Issue, and Issue Description; for monographs they are used for multi-volume works, and include Volume, Part, Description. The Enumeration fields are used to identify multiple copies of the same item for circulation.

### **Enumeration Level 1 (A) (Vol.)**

This information is intended for a multi-volume work. If the item is a single-volume work, leave the field blank. It can be used for determining the order of the list of items, and although you can enter both characters and numbers, it is suggested that you use numbers. For ISSUE items, the volume is filled in from the Publication Pattern record.

### **Enumeration Level 2 (B) (Issue Number)**

This information is intended for a multi-volume work. If the item is a single-volume work, leave the field blank. Enter the issue or part number.

## **Description**

The Description field is used to provide information to the end-user about the particular volume. For ISSUE items the information is copied from the publication pattern record. For multi-volume monographs enter the relevant information.

## **Material Type**

Material Type information is mandatory. Choose the material type from the drop-down list. The specific choices available on the menu are determined by the System Librarian. Note that the sort order of the Items List for items with material type "ISSUE" (as well as ISSBD for bound issues) can be different than for other items.

## **HOL Link**

The HOL Link field is optional. It is used to link the item record to a holdings record, in which case the call number information (Sublibrary, Collection, Call Number Type and Call Number) is controlled by the 852 field of the holdings record. See also Temporary Location flag.

## 85x Type

If this item was created using the 853/853X method, this field indicates whether it was created from an 853, 854 (supplement) or 855 (index) tag, by displaying 3, 4 or 5 respectively.

## Linking Number

If more than one 853/853X pair (or 854/854X pair or 855/855X pair) was created for the title, this field indicates which of them was used for the creation of this item. It is based on the content of subfield \$8 of tag 853, 854 or 855 respectively.

## Call Number Type

The Call Number Type defines the type of call number used in the following call number fields. You may choose from a drop-down list. This field is equivalent to the first indicator of the MARC 21 852 field.

## Call Number

The Call Number is an alphanumeric code that identifies the shelf location of the item. Depending on how your System Librarian has set up the Items function, you can type in text, choose from a drop-down list, or activate an automatic counter by typing ? and the code of the counter. In this case, the system automatically assigns a call number as soon as you click the Update button. If you want the Call Number to include a subfield, type two dollar signs (\$\$) before the subfield code (for example, \$\$i to designate subfield i for item part). Depending on your system setup, there is an option to call a special "852 Form". If your library assigns only one call number to an item, fill in this field and leave the **Second Call Number** field blank. The icon located to the right of the **Call Number** field enables the opening of the **Call Number List**. For more information, refer to the Call Number Field section of the *Aleph 21 System Librarian Guide - Items*.

## Second Call Number Type

Use this field to define the Call Number Type of the second call number (if you use a second call number).

## Second Call Number

The Second Call Number Type is an alphanumeric code that identifies the shelf location of the item. Depending on how your System Librarian has set up the Items function, you may type in text, choose from a drop-down list, or activate an automatic counter by typing ? and the code of the counter. In this case, the system will automatically assign a call number as soon as you click the Update button. If your library assigns only one call number to an item, be sure to fill in the first Call Number field and leave this field blank. The Second Call Number is not controlled by the holdings record. Depending on your system setup, there is an option to call a special "852 Form". The icon is located to the right of the Call Number field. It enables the opening of the **Call Number List**. For more information, refer to the Call Number Field section of the *Aleph 21 System Librarian Guide - Items*.

## Item Status

The Item Status field is mandatory. Item Status defines the circulation status for the item. Choose the Item Status from the drop-down list. The specific choices available on the menu are determined by the statuses that are valid for the sublibrary.

## Item Process Status

The Item Process Status field is optional. It describes the item's current process status.

## Temporary Location

A check mark in the Temporary Location box indicates that the location information (Sublibrary, Collection, Call Number, and Call Number Type) for this item record should not be updated from the Holdings record.

### 4.1.2 General Information (2) Tab

The screenshot shows a software interface with a tabbed menu at the top: 1. Item Display, 2. General Information (1), 3. General Information (2) (selected), 4. Serial Information, 5. Serial Levels, 6. HOL Links. The main area contains several input fields and buttons. On the left side, there are fields for: Inventory Number (with a dropdown arrow), Inventory Date (00/00/0000), Last Invent. Report Date (00/00/0000), Price (12.00), OPAC Note (with a dropdown arrow), Circ. Note (with a dropdown arrow), Internal Note (with a dropdown arrow), Order Number (51531 with a dropdown arrow), Invoice Key (00000 with a dropdown arrow), and Invoice Note (with a dropdown arrow). On the right side, there are buttons for: Update, Add Multiple, Save Defaults, Refresh, Subscr Defaults, and Cancel. There are also some smaller dropdown arrows and buttons next to the Open Date and Update Date fields, which both show 01/07/12.

## Inventory Number

Inventory Number information is optional. A unique Inventory Number can be assigned. Depending on how your System Librarian has set up the Items function, you may type in a number, choose an automatic counter from a menu, or activate an automatic counter by typing ? and the code of the counter. In this case, the system automatically assigns an Inventory Number as soon as you click the Update button.

## Inventory Date

This is the date on which the Inventory Number is assigned. If you leave this field blank and enter an Inventory Number, the system automatically fills in the Inventory Date when you click the Update button.

## Last Inventory Report Date

This field automatically records the last date on which an Inventory report was produced. The Inventory report is produced by running the services Shelf Reading Report (item-04) and Shelf List (item-05).

## Price

Depending on the library setup, if the item is created in the Acquisitions process, Price is computed by the system, using information that was entered in the Order form. The local price is divided by the number of units. When the order is closed, the item price is calculated again: the amount of all invoices assigned to the order is divided by the number of units. If the Price is modified or the item record was created at a different time, the Price must be manually reported.

## OPAC Note

OPAC Note information is optional. The text entered here will appear in the OPAC for the user to read.

## Circ. Note

Circulation Note information is optional. The text entered here may be displayed when an item is loaned or returned (if the Circulation module's setup options have been defined to display this note).

### **Internal Note**

Internal Note information is optional. The text entered here will appear on this form and in the Navigation Window and is intended for library staff only.

### **Order Number**

Order Number information is optional. When the item record is created in Acquisitions, the Order Number is automatically copied to this field. You can use the arrow to the right of the field to place the order number to which the item is linked or click **List** to open the Orders Index List window, and select the required order number for this Item record.

### **Invoice Key**

Optional. The Invoice Key includes the following details: Vendor Code, General Invoice number and Invoice Line Item sequence number that are assigned to the Order number quoted in the Order Number field. In order to fill in this field, use the arrow to the right of the field to open the Invoice List for Order number window, and to select the relevant line item.

### **Invoice Note**

Read-only field. In the event that you select Invoice Key, the Invoice Line Item note is displayed in this field.

### **Statistic**

Depending on library's setup, Statistic information can be optional or mandatory. You may enter text up to 10 characters. Enter information such as the department or collection for which the item was purchased. An Edit Item Statistic Field form can be displayed when you click on the arrow to the right of the Statistic field, depending on your system setup.

### **Remote Storage ID**

Type in the Remote Storage ID or choose one from the drop-down list.

### **Open Date**

The Open Date is the date the item record was created. The date is filled in automatically by the system.

### **Update Date**

The Update Date is the last time the record was updated. The date is filled in automatically by the system.

### 4.1.3 Serial Information Tab

The screenshot shows a web-based interface with a tabbed menu at the top containing: 1. Item Display, 2. General Information (1), 3. General Information (2), 4. Serial Information (selected), 5. Serial Levels, and 6. HOL Links. The main area contains several input fields: 'Subscription No.' with a dropdown arrow; 'Pages' with a text input field; 'Description' with a text input field and a small icon; 'Issue Date' with a date picker showing '01/07/2012'; 'Exp. Arrival Date' with a date picker showing '01/07/2012'; 'Arrival Date' with a date picker showing '01/07/2012'; and 'Break Indicator' with a dropdown arrow. On the right side, there is a vertical column of buttons: 'Update', 'Add Multiple', 'Save Defaults', 'Refresh', 'Subscr Defaults', and 'Cancel'.

This tab relates to items that are journal issues. The field content is automatically created by the serials control system.

#### **Subscription No.**

Subscription No. is the sequence number of the Subscription in the Serials function. It is filled in automatically by the system if an item was opened in the Serials function. This field can be edited. The user may select the subscription number from the drop-down list with all the possible subscriptions of the document.

#### **Pages**

The Pages field is optional. Enter the pages included in the issue.

#### **Description**

The Description field is used to provide information to the end-user about the particular volume. The data in this field can be entered manually. In addition, for ISSUE items generated by the "Schedule" pattern format the description field is generated from the schedule description template, and for ISSUE items generated by the "Pattern" format the description field is generated from the captions in the 85x field and the enum/chron in the item record.

#### **Issue Date**

This is the date on which this issue was or is expected to be published. It is automatically calculated by the system when issues are opened in the Serials function or by a batch process. When an ISSUE item (Material Type beginning with ISS) is created and if the issue date is zero, the issue date is automatically set to the current date. If, however, the item process status is "NO" (not ordered), the issue date is left as zero.

#### **Expected Arrival Date**

This is the expected date of arrival of the issue, taking into account the delay from the issue date to the date of receipt or first claim period, as defined in the Subscription Form. It is automatically calculated by the system when issues are opened in the Serials module or by a batch process. When an ISSUE item (Material Type beginning with ISS) is created and if the Expected Arrival Date is zero, the date is automatically set to the current date if there is no subscription. If, however, the item process status is "NO" (not ordered), the Expected Arrival Date is left as zero.

## Note

If an item which was expected to arrive on a specific date has been claimed, it means that it did not arrive on the date specified; accordingly, set the Expected Arrival Date to zero to display item process status (claimed) in the Web OPAC due date column.

## Arrival Date

This is the actual date on which the item was checked in.

## Break Indicator

This field is optional. It can be used to indicate the reason why an item which has not arrived has not been received, and it can be taken into account when building a summary holdings statement. Summary holdings are built using the processing status, and the break indicator can be used to map the item to a process status.

**G** - Gap (there is doubt as to the cause of an item's not having been received)

**N** - Non-gap (item has not been published)

**Blank** - Irrelevant

**For the System Librarian:** The possible values are set in the `pc_tab_exp_field.lng` menu: ITEM-GAP-INDICATOR

## 4.1.4 Serial Levels

The screenshot shows a web interface with a tabbed menu at the top: 1. Item Display | 2. General Information (1) | 3. General Information (2) | 4. Serial Information | 5. Serial Levels | 6. HOL Links. The 'Serial Levels' tab is active. The form contains several input fields arranged in two columns. The left column includes: Enum. Level.1 (A)(Vol.), Enum. Level.2 (B), Enum. Level.3 (C), Enum. Level.4 (D), Enum. Level.5 (E), Enum. Level.6 (F), Alt. Enum.1 (G), Alt. Enum.2 (H), and Sub-O. The right column includes: Chron. Level.1 (I)(Year), Chron. Level.2 (J), Chron. Level.3 (K), Chron. Level.4 (L), and Alt. Chron.(M). On the far right, there are five buttons: Update, Add Multiple, Save Defaults, Refresh, and Subscr Defaults, with a Cancel button at the bottom right.

The fields comprising this tab are normally pre-filled with the data relevant to the serial item.

You may add additional data or change existing data. The data is based on the serial prediction pattern as defined in the 853/853X fields in the ADM record See also the Overview of 85x and 85xX Fields section in the Serials - Prediction Patterns chapter.

### Enum. Level.1 (A) (Vol.)

If this serial uses the year in its enumeration, and you entered this information in the Publication Pattern, this will be the volume number as copied from there. If, however, you are adding a new issue, this field will be empty and you must enter the relevant volume number so that the sorting of issues will be correct.

### Enum. Level.3 (B) (Issue Number)

If you entered this information in the Publication Pattern, this will be the Issue Number as copied from there. If, however, you are adding a new issue, this field will

be empty and you must enter the relevant issue number, so that the sorting of issues will be correct.

If this is a supplementary issue or an index, you can ensure that the issue will be displayed in the correct sequence by adding a decimal point to the issue number. For example, if the issue you are currently registering is an index that is published between issues 4 and 5, you can enter Issue Number 4.1 in this field to place it between issues 4 and 5. Window.

**Enum. Level.3 (C) (Part)**

Enumeration C is optional. Enter the Part number of this issue if the serial is organized in this manner.

**Enum. Level.4 (D)**

If there are more than 3 levels of enumeration for this serial, the relevant data will be displayed in this field, and in the Enumeration E and Enumeration F fields, if applicable.

**Enum. Level.5 (E)**

See Enumeration D for help.

**Enum. Level.6 (F)**

See Enumeration D for help.

**Alt. Enum.1 (G)**

If this serial uses alternative enumeration, the relevant data will be displayed in this field.

**Alt. Enum.2 (H)**

If this serial uses a second level of alternative enumeration, the relevant data will be displayed in this field.

**Chron. Level.1 I (Year)**

If this serial uses the year in its enumeration, and you entered this information in the Publication Schedule window, this will be the year as copied from there. If, however, you are adding a new issue, this field will be empty and you must enter the relevant year yourself, if applicable.

**Chron. Level.2 (J)**

If the second, third or fourth levels of chronology also apply to this serial (for example, months or seasons), the relevant data will be displayed in this field and in fields Chronological K and Chronological L, if applicable.

**Chron. Level.3 (K)**

See Chronological J for help.

**Chron. Level.4 (L)**

See Chronological J for help.

**Alt. Chron. (M)**

If the title uses alternate chronology, the relevant data will be displayed in this field.

### **Supp Index (O)**

This field is reserved for the text describing an index or supplement type issue. It is based on the content of subfield \$o of MARC 21 tag 854 (for supplement) or 855 (for index).

#### **4.1.5 HOL Links**

From the HOL Links tab of the Items form you can create a new HOL record, link or unlink the highlighted item in the Items List to an existing Holdings record, and call up a HOL record for editing in the Cataloging module. The HOL records that are linked to the highlighted item will appear in the HOL links tab with a checkmark in the Linked column. The Hol. Link field for the relevant item will have the HOL no. of the HOL record to which the item is linked. The Linked field will contain a checkmark.

## Edit

If you wish to edit an existing HOL record appearing on the List of Holdings Connections, highlight it and click the **Edit** button. The system opens the relevant HOL record in the Cataloging module where you can edit and re-send it to the server.

## Create New

If you wish to create a new HOL record to link to an item, you must first highlight an item in the Items List and then click the **Create New** button in the lower pane. A new HOL record will be created, based on the Sublibrary/Collection information from the highlighted item.

## Link

If there are already HOL records on the lower pane (for example, those created for earlier items), you can highlight one of them, and by clicking **Link**; link them to the highlighted item.

## Unlink

You can unlink the highlighted item from an existing HOL record by highlighting the HOL record and clicking **Unlink**.

## 4.2 Global Changes

The Global Changes option enables you to make changes on a selected set of items. The set of items that will be retrieved is determined by the filters in the "Select by" part of the form. The changes are made according to the values set in the "Change to" part of the form.

### Note

If the items are linked to a holdings record, the fields in the item which are taken from the holdings record (sublibrary, collection, location type, call number and copy number) will not be changed by *global changes*. In this case, if you modify the Holdings record, the related field of the linked item is changed accordingly.

**Global Changes**

Select by:

HOL Link: 00000000

Copy Number:

Collection: COLDE

Sublibrary: WID

Item Status: 01

Item Process Status:

Remote Storage ID:

Year:

Volume:

Call Number:

Material Type: MAP

Arrival Date: 04/04/2005

Order Number: LIARCV-401

Subscription No.: 5

Change to:

HOL Link:

Copy Number:

Collection:

Sublibrary:

Item Status:

Item Process Status:

Remote Storage ID:

Call Number:

Temp. Location: No Change

Material Type:

Arrival Date: 01/01/1900

Order Number:

Subscription No. To:

OK

Clear

Cancel

Help

The Global Changes window has two sections:

- "Select by", for entering filters for item records to include in the global change
- "Change to", for entering the new field values.

### **Select By**

Some of the fields in the Select By section are already filled in. They are taken from the fields that are defined for the selected item. You may erase or change the values in these fields as desired. You may also enter in any field:

*	Include all values for this field.
-	Only select items that do not have a value in this field.
blank	Ignore this field

### **HOL Link**

Retrieve items that have this HOL link. The HOL link is the system number of the Holdings record to which an item is linked.

### **Copy Number**

Retrieve items that have this copy number.

### **Collection**

Your library may designate collections such as Maps, Oversize or 4th floor. Type in the collection or choose one from the drop-down list.

### **Sublibrary**

Retrieve items that are in this sublibrary. Choose the sublibrary from the drop-down list. The specific choices available on the menu are determined by the system administrator.

### **Item Status**

Retrieve items that have this item status. Choose the item status from the drop-down list. The specific choices available on the menu are determined by the system administrator.

### **Item Process Status**

Retrieve items that have this item process status. Type in the item process status or choose one from the drop-down list.

In the "Select by" section:

Enter an asterisk (\*) or leave this field blank to change ALL Item Process Statuses.  
Enter a hyphen (-) to make a change only if the Item Process Status field is blank.

In the "Change to" section:

Enter ZZ in the Item Process Status field to change the item process status to BLANK="Not in process".  
Leave this field empty if you do not want to change the Item Process Status.

## **Remote Storage ID**

Retrieve items that have this Remote Storage ID. Type in the Remote Storage ID or choose one from the drop-down list.

In the "Select by" section:

Enter an asterisk (\*) or leave this field blank to change ALL Remote Storage IDs. Enter a hyphen (-) to make a change only if the Item Remote Storage ID field is blank.

In the "Change to" section:

Enter ZZ to change the Remote Storage ID to BLANK="There is no Remote Storage ID".

Leave this field blank if you do not want to change the Remote Storage ID.

## **Year**

Retrieve items from this year. Enter the journal year in which this issue is published. Be sure always to use four digits to indicate the year, for example, 1997 instead of just 97. You may also use hyphens and slashes, for example, 1997/1998 (to indicate that a volume starts at some point within one year and ends 12 months later in the following year) or 1998-1999 (to indicate that a volume runs from the beginning of one year to the end of the following year). To identify a serial by its volume alone and not by its year, leave the year blank.

## **Volume**

Retrieve items that have this volume number. This information is intended for a multi-volume work. If the item is a single-volume work, leave the field blank.

## **Location**

Retrieve items that have this location. The small box is the Location Type and the large box is the Location.

## **Material Type**

Retrieve items that have this material type. Choose the material type from the drop-down list. The specific choices available on the list are determined by your system librarian.

## **Arrival Date**

Retrieve items that have this arrival date.

In the "Select By" section:

- Use the dummy date 01/01/1900 to retrieve all items, regardless of their arrival date.
- Use the value 00/00/0000 to retrieve only items that do not have an arrival date.

In the "Change To" section:

- Use the dummy date 01/01/1900 to mean 'do not change the arrival date'.
- Use the value 00/00/0000 to change the arrival date to zeros.

## Order Number

Retrieve items that have this Order Number. In order to fill this field, click the **List** button to the right of the field to invoke the Order Index List, and then select the relevant line, or click the arrow button to enter the order number to which the item is linked.

In the “Select By” section:

- Enter an asterisk (\*) or leave this field blank to change ALL Order Numbers.
- Enter a hyphen (-) to make a change only if the Order Numbers field is blank.

In the “Change To” section:

- Use “ZZ” to change the order number to blank.
- Leave the field empty if you do not want to change its value.

## Subscription No.

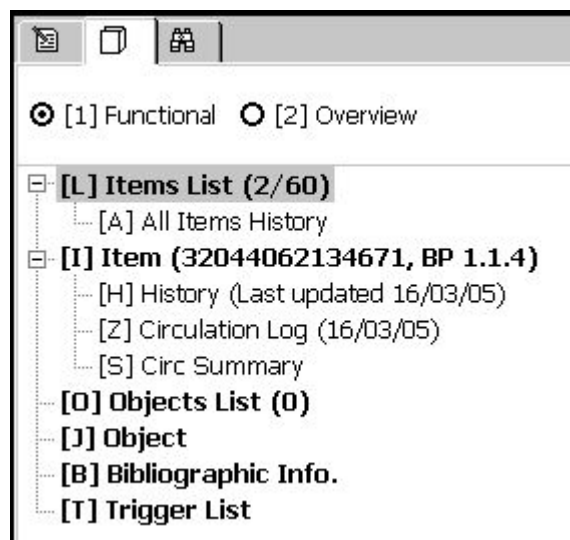
Retrieve items that have this subscription number. This is the sequence number on the Subscription List in the Serials function.

## Change to

All of the filter fields can be changed, except for Year/Volume. If the location is controlled by a holdings record, it cannot be changed, although changing the link to a holdings record can, of course, change the location. You may also use the Temp Location field in order to change the Item's temp location status.

## 4.3 All Items History/History

Select the All Items History or History node to display the log of changes made to item records.



- Click **View** to display the record as it was in view mode.
- Depending on the type of change made, the previous version of the item record can be restored by clicking the **Restore** button.

- Click **Remove** to delete the log record.

0726	Jennings, William	14/05/03 10:27	19/05/03 24:00	27/07/03 11:29	----- 00:00
0726	Jennings, William	19/06/03 11:30	24/06/03 24:00	19/06/03 11:32	----- 00:00
PID52	ABBOTT, EMMA ELIZABETH	09/07/03 12:27	13/07/03 24:00	09/07/03 12:29	----- 00:00

For a description of the Circulation Log node, refer to the *Circulation Logger* section of the *Circulation Staff User Guide*.

#### 4.4 Offline Items Editing

Items of the same ADM document may be put in a private Items Set, which is saved per staff user. The Set's items may be edited offline later, so that after the offline editing the changes are downloaded to the server in a bulk action. The following is the offline item editing workflow.

1. Add Items to the Offline Items Set by clicking the **Add to Set** button that is found in the Cataloging module Items Tab. Several items may be added in a single action by first selecting multiple lines and then clicking **Add to Set**.
2. View the Items Edit Set interface by selecting the Items\Edit Items Set Offline menu option.

Items	Edit Actions	Edit Text
	Print Item Labels	
	Item Process Status	
	Delete Item Defaults	
	Delete Object Defaults	
	Clear Item	
	Inventory Marking	
	Edit BIB Record	
	Edit Items Set Offline	

After selecting this menu option, the following interface is displayed:

Edit Items Set - ADM Doc Number 001792164

**BIB= 1792164 ADM= 1792164 - The Foxonian Quakers, dunces lyars and s (Young, Samuel, fl. 1684-1700.) Year: 1697.**

1. Items List | 2. Error Report

Seq.	B-C	Sublibrary	Description	Call number	Collection	Status	Notes	Loans
10	1792164-1 0	DePauw ROW Library	v.1::no.1(: 2009:Jan. 01)			Not arrived		0
30	1792164-3 0	DePauw ROW Library	v.1::no.3(: 2009:Jan. 20)			Not arrived		0
40	1792164-4 0	DePauw ROW Library	v.1::no.4(: 2009:Feb. 01)			Regular Loan		0
70	1792164-7 0	DePauw ROW Library	v.1::no.7(: 2009:Mar. 01)			Regular Loan		0
90	1792164-9 0	DePauw ROW Library	v.1::no.9(: 2009:Mar. 20)			Regular Loan		0
110	1792164-1 10	DePauw ROW Library	v.1::no.11(: 2009:Apr. 10)			Regular Loan		0
130	1792164-1 10	DePauw ROW Library	v.1::no.13(: 2009:Apr. 10)			Regular Loan		0

Buttons: Save Set, Delete From Set, Cancel

---

1. General Information (1) | 2. General Information (2) | 3. Serial Information | 4. Serial Levels

Barcode: 1792164-10    Item Status: 01    Reload

Sublibrary: DUROW    Item Process Status: NA    Prev

Collection:    Enum. Level.1 (A)(Vol.): 1    Next

Copy Number:    Enum. Level.2 (B): 1

Material Type: ISSUE

Hol. Link: 000000000

85X Type/Linking Number: 3    000000000     Temporary Location

Call No. Type/Call No.:    ...

2nd Call No. Type/Call No.:    ...

Description: v.1::no.1(: 2009:Jan. 01)

3. Edit the Set's items in the lower pane Item Form. Move between lines by clicking the **Prev** and **Next** buttons (or by pressing <ENTER>). An item's changes are saved offline when the line selection is moved to another line. The line color is then changed.

**Edit Items Set - ADM Doc Number 001792164**

**BIB= 1792164 ADM= 1792164 - The Foxonian Quakers, dunces iyars and s (Young, Samuel, fl. 1684-1700.) Year: 1697.**

1. Items List | 2. Error Report

Seq.	B-C	Sublibrary	Description	Call number	Collection	Status	Notes	Loans
10	1792164-1 0	DePauw ROW Library	v.1::no.1(: 2009:Jan. 01)			Not arrived		0
30	1792164-3 0	DePauw ROW Library	v.1::no.3(: 2009:Jan. 20)			Not arrived		0
40	1792164-4 0	DePauw ROW Library	v.1::no.4(: 2009:Feb. 01)			Regular Loan		0
70	1792164-7 0	DePauw ROW Library	v.1::no.7(: 2009:Mar. 01)			Regular Loan		0
90	1792164-9 0	DePauw ROW Library	v.1::no.9(: 2009:Mar. 20)			Regular Loan		0
110	1792164-1 10	DePauw ROW Library	v.1::no.11(: 2009:Apr. 10)			Regular Loan		0
120	1792164-1 0	DePauw ROW Library	v.1::no.12(: 2009:Apr. 10)			Regular Loan		0

Buttons: Save Set, Delete From Set, Cancel

---

1. General Information (1) | 2. General Information (2) | 3. Serial Information | 4. Serial Levels

Barcode: 1792164-90 | Item Status: 01 | Reload

Sublibrary: DUROW | Item Process Status: | Prev

Collection: | Enum. Level.1 (A)(Vol.): 1 | Next

Copy Number: | Enum. Level.2 (B): 9

Material Type: ISSUE

Hol. Link: 000000000

85X Type/Linking Number: 3 | 000000000 |  Temporary Location

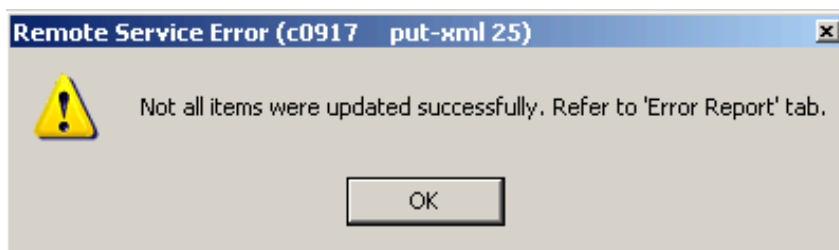
Call No. Type/Call No.: | | ...

2nd Call No. Type/Call No.: | | ...

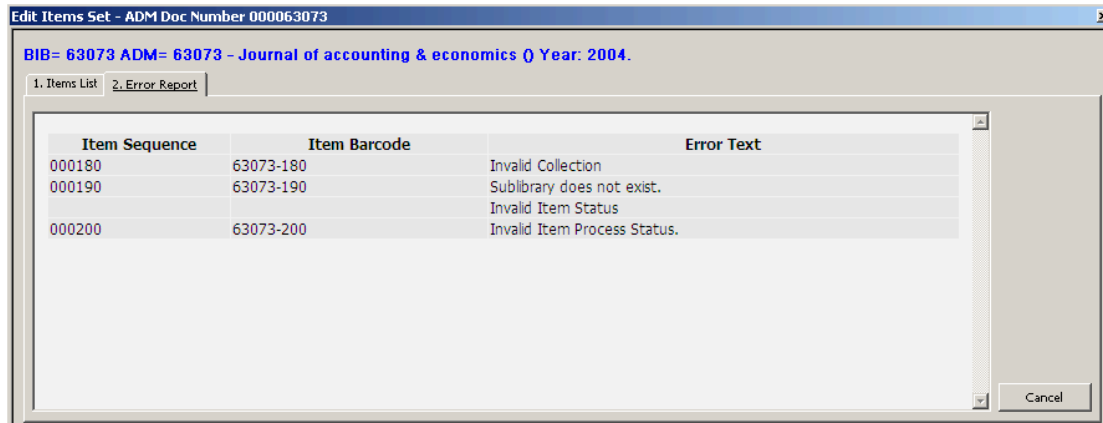
Description: v.1::no.9(: 2009:Mar. 20)

- When all of the desired changes have been done, click the **Save Set** button to download all of the changes to the server in a single bulk action. The updated items are then removed from the set.

If an error has been detected in one or more of the downloaded items, an error message is displayed.



The errors are reported in the Errors Tab.



To print the list of errors, right-click the upper pane and select **Print**.

## 5 Item Label

See the document How to Print Labels - Version 15 and Later which is available on the Ex Libris Documentation Center under ALEPH 500 Documentation/How To/Printing.

## 6 Binding

This chapter includes the following sections:


- Binding in ALEPH
- Using External Binding Software with ALEPH
- Completed Volume Report

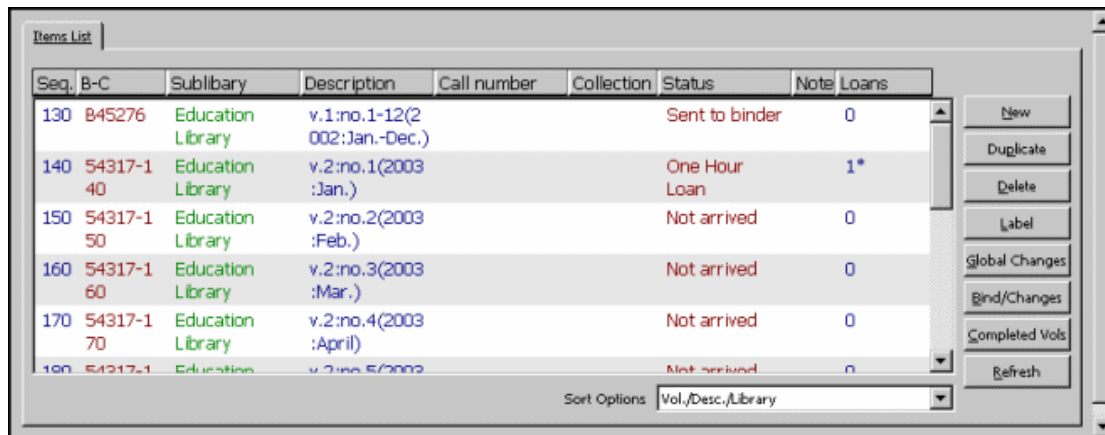
### 6.1 Binding in ALEPH

Within ALEPH, binding is defined as the process whereby a group of items (serial issues or series volumes) are "bound" into a single new item (the bound volume), and consequently deleted from the system (although still kept in the system as "historical" items). The way in which the OPAC indicates that volumes/items have been removed for binding purposes is also part of the process.

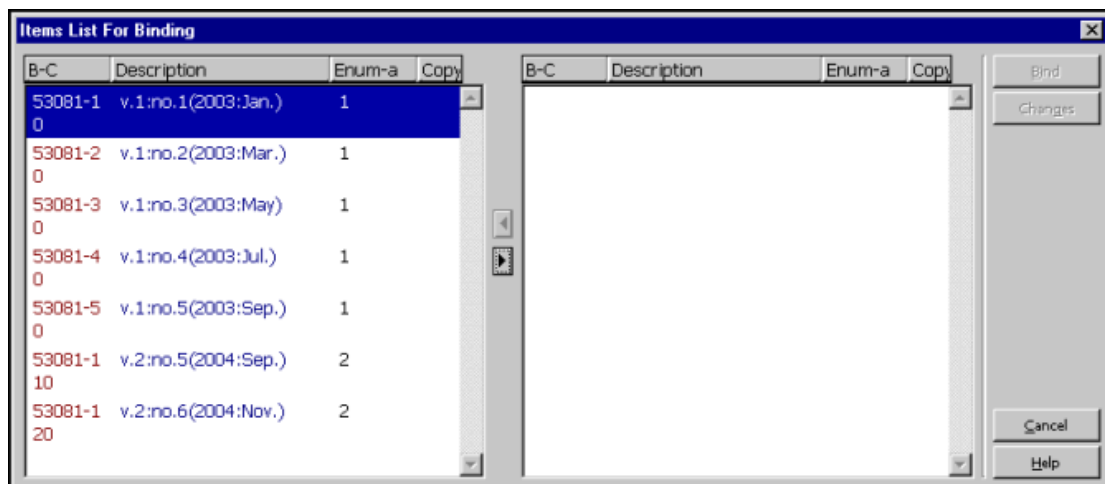
Enter the item's barcode or call number in the Item Bar's Item field.



and click . The list of items will be displayed in the Items List tab in the upper pane.



Select an item and click **Bind/Changes**. The Item List for Binding window will be displayed:



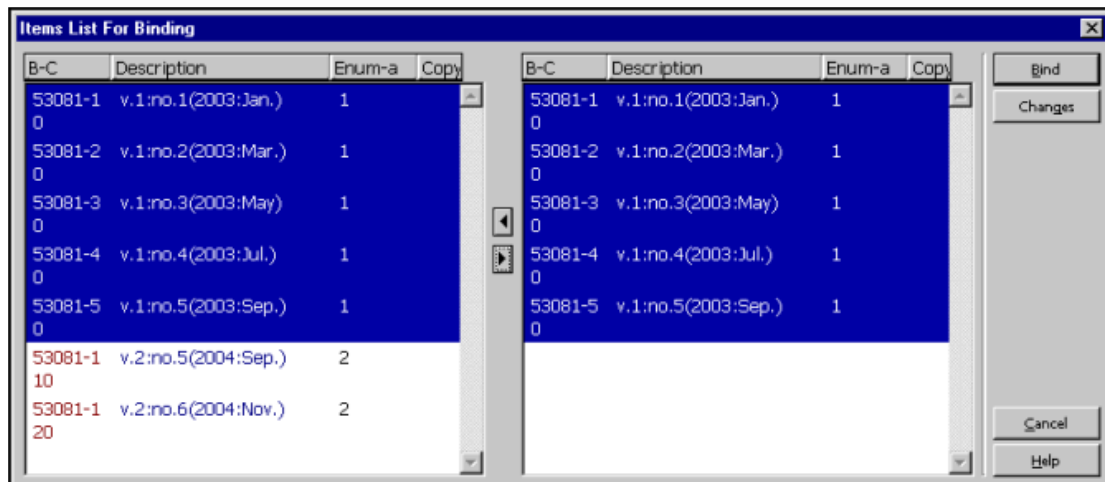
**Important Note:** Items for inclusion in the Item List for Binding window are only filtered by sublibrary. Therefore, if your library has more than one copy (subscription) for this particular title, it is important that you select an item belonging to your own sublibrary (or the one you are doing the binding for).

This window has two frames: in the left-hand frame, you can see all the items belonging to the sublibrary you are doing the binding for.

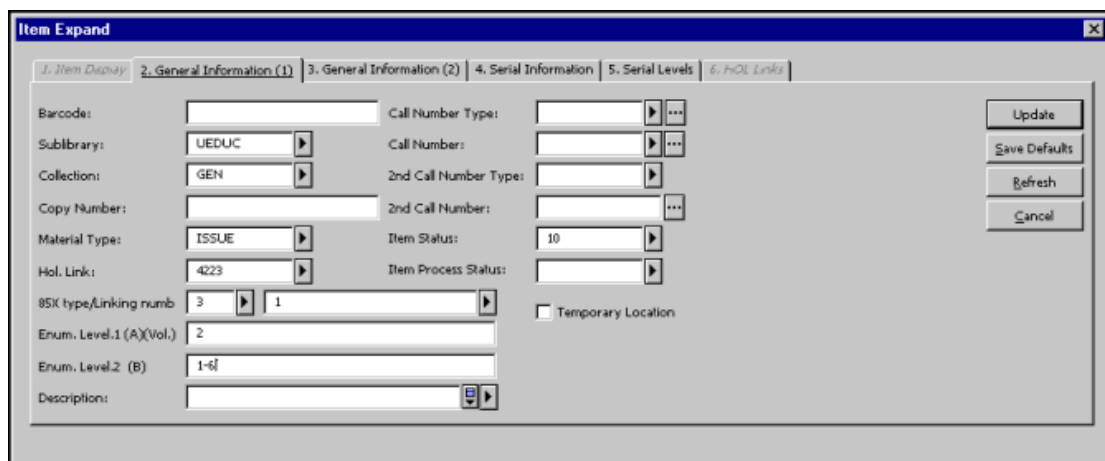
You then collate the items for binding into the right-hand frame, using the right arrow. You can use multi-selection on the left-hand items before moving them to the right-hand frame.

The following screen capture shows the window immediately following the selection of relevant items and their collation into the right-hand frame.

**Note:** You can use the arrows to move items back and forth between the two frames.



Highlight all the entries on the right side, click **Bind** and an Item Expand form will be displayed:



Enter information regarding the bound volume. If the item is not linked to a pattern record, change information as required. For example, enumeration levels and description. If the item is linked to a pattern record, change the information as required and leave the description field blank in order that it be automatically generated. Clicking the Refresh button will provide the new item with a new default barcode. When you finish updating the bound volume's information, click Update and this new item will be added to the system and displayed alongside other items belonging to this title.

Note that after Update is clicked on the modified Item Form, the following changes occur:

1. A new value, ISSBD, is entered into the Material Type field; and
  2. A new value, BD, is entered into the Item Process Status field.
- ISSBD is a special material type automatically assigned by the system to bound volume items, allowing them to be sorted as serial issue items.

- BD is automatically allocated to bound volume items to indicate to the OPAC users that those items are in binding. However, it is possible for the system librarian to allocate another Item Process Status and accompanying text in a table.

### Note

The items which comprise a newly-bound volume item are automatically discarded in the process, but they are still kept in the system as historical records. To view the items that make up a bound volume item, select the All Item History node and then the Item Changes tab in the right pane.

## 6.2 Using External Binding Software with ALEPH

The external binding preparation software packages ABLE™ and LINCPlus can be used with ALEPH. This requires Ex Libris licensing (it is not included in the standard ALEPH 500 software package).

1. Create volumes for binding as explained above.
2. The item barcode is read into the external software.
3. The interface can include exporting data from ALEPH through Z39.50; checkout of material, change process status and check-in.
4. Check out: When an item is sent to a bindery, it is checked out of ALEPH in one of two ways:
  - Set the item's process status to a status that reflects that it was sent to binding. This is activated by defining the following variable in the `pc_server_default` file:

```
setenv ext_bind_process_status          SB
```

- Loan the item to the binder with the due date for the loan set to the expected arrival date of the bound item back in the library. This is activated by defining the following variable in the `pc_server_default` file:

```
setenv ext_perform_loan                  Y
The binder is a patron whose Patron ID is <binder name>.
```

5. Check in: When an item is received from a bindery, it is checked into ALEPH in one of two ways, that correspond to the check out process:
  - Reset the item's process status to the original status that existed before it was changed to sent to binding.
  - Return the item that was loaned to the binder.

Able™ uses a Z39.50 port and LINCPlus uses the `pc_server` port. The following special set up in `pc_server_defaults` is required to provide bibliographic information for LINCPlus. This setup is used to define up to three tags from the bibliographic record:

```
setenv ext_bind_ref_no_1          LCNum,010,a
setenv ext_bind_ref_no_2          ISBN,020,a
setenv ext_bind_ref_no_3          ISSN,022,a
```

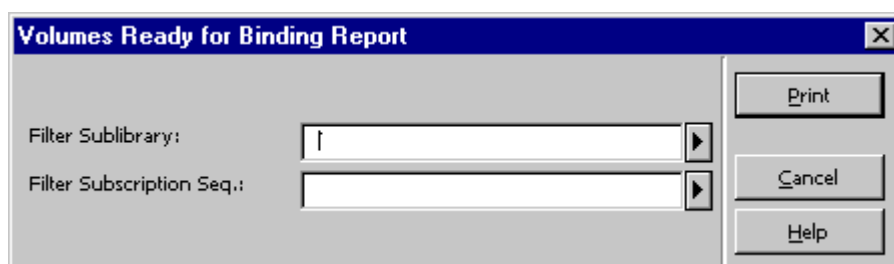
### 6.3 Completed Volume Report

You can view or print a report for a given title, listing volumes which have all their issues checked in. This can be useful for the binding preparation process.

This report can include volumes with issues that have not arrived, according to a parameter set up by the System Librarian. That parameter defines a maximum number of days for issues to arrive following their Expected Date of Arrival (EDA), after which the volume containing them is considered complete despite their unavailability in the library, and appears in the report.

To print the report, open the record in the Items function, and click the Completed Volumes button on the Items List tab in the upper pane.

The Volumes Ready for Binding Report window is displayed, where you can filter the data by sublibrary and by subscription (copy) sequence.



Click **Print** to print or view the report.

## 7 Inventory Management

Inventory Management lets you analyze inventory status with regard to missing or misshelved items. The analysis can be done either as an online process or as a batch process.

### 7.1 Initiating the Inventory

The first stage in analyzing an inventory is to define a physical range of items as an inventory. At this stage, the boundaries of the inventory range being checked are defined by parameters such as call number range, sublibrary, collection, item status and process status and material type. The inventory being checked receives an identifier that is used later on for executing the Inventory Period. This is achieved by running the Inventory Definition (item-01) batch service.

## 7.2 Conducting the Inventory

At this stage, the inventory is checked and its current status is compared with the database status. This can be done in one of two ways:

- Manual online inventory - The physical shelf is checked and the ALEPH client is updated online with each item that is scanned. This stage is called *Marking*.
- Batch inventory - The physical shelf has been previously checked, and the ALEPH client is updated by using an input file with the items' barcodes.

These two methods are described below.

### 7.2.1 Conducting an Online Inventory

To conduct an online inventory (Marking):

1. From the Cataloging module, click **Items**, then **Inventory Marking**.

The **Inventory Marking** command opens the form that defines various parameters to be used for the Marking session:

The screenshot shows the 'Inventory Marking Parameters' dialog box. The 'Shelf Report Number' field contains the value '30'. Under 'Select Lost/Missing Process Statuses', the 'None' option is selected. The 'Receive Popup Message' checkbox is checked, while 'Print Report at End of Session' is unchecked. In the 'Error Types to Include' section, all four options are checked: 'Item is on Loan', 'Item is not in place', 'Item is Lost or Missing', and 'Item is not in the Database'. The 'OK', 'Cancel', and 'Help' buttons are visible on the right side of the dialog.

2. When you have finished filling in this form, click **OK**. This opens the marking box, where the marking of the found items is done by entering the item's barcode:

Inventory Marking	
Total Items in Inventory	5
Items Found	1
Items to be Processed	4
Item Barcode	

3. Click **Submit**. This marks the item as found. Clicking **Submit** also displays reports of any errors that have been configured at the beginning of the session as requested for reporting. The errors will be reported by either a popup message or a printed report, also depending on what has been configured at the beginning of the session.
4. Click **Close**. This ends the Marking session, triggering a printout of the error report, if such a report was requested at the beginning of the session.

### 7.2.2 Conducting a Batch Inventory

You conduct a batch inventory to mark items as found by running a service. The Inventory Marking (item-08) service receives an input file of item barcodes, located in the ADM library's `data_scratch` directory, and an Inventory number (shelf report number) to work on. In addition, you can choose whether or not to produce an error report in the `data_print` directory of the ADM library, and to provide the report file name. Other parameters are lists of lost/ missing process statuses and error types to include, exactly as with the online marking.

## 7.3 Summary Reports

Two Summary Reports are used to report the inventory status. They are normally run when the inventory period is over, although they can be run at any stage. The following reports are available:

### Inventory Summary (item-09)

This service creates a summary report of the inventory status, and allows updating of inventory items process statuses according to the inventory check results.

### Inventory Report (item-10)

This service produces a report of the inventory items, consisting of each item's details and whether the item was marked as found or accounted for (on loan, on hold shelf, process status *missing*, and so on).

## 8 Items Services

Each service is identified in the Batch Log and Batch Queue by its procedure name.

### General Retrieval Form (ret-adm-01)

This service retrieves ADM record numbers and places them in an output file. The output file serves as a base for other services. For example, it is used as the input file

for the Update Item Records (manage-62) service. The service also produces a report of retrieved items. The report can be found in the PRINT directory under the same name as the output file used earlier.

### **Advanced General Retrieval Form (ret-adm-03)**

Similar to the General Retrieval Form (ret-adm-01), this service retrieves items, places them in an output file, and produces a batch report.

It has the following advanced features beyond the General Retrieval Form:

- The Advanced Retrieval Form can be run in parallel process (divided into cycles) in order to improve performance. This option is enabled only if the service is run without an input file.
- Instead of five value fields for each filter (as in ret-adm-01), there is only one field where it is possible to enter up to 20 values, separated by semicolons.
- For each filter, the user can include or exclude the listed values.

### **Update Item Records (manage-62)**

This service takes an individual Item Record or a set of Item Records and substitutes the data in fields according to the requested substitutions.

This service includes the **Temporary/Permanent Location** drop-down list that allows you to select a value for the **Item Temporary** field and update the item with temporary or permanent information. The following options are available:

- **No change** – no change in the Item Temporary location value.
  - For items that are not linked to a HOL record with 852 information, item information is updated with new values taken from the batch input.
  - For items that are linked to a HOL record with 852 information and its Temporary Location flag is set to `NO`; the HOL 852 location information overrides the batch input.
  - For items that are linked to a HOL record with 852 information and its Temporary Location flag is set to `YES`; batch input location values are stored in the item record (regardless of HOL 852 information).
- **Change to Temporary** – the Item Temporary location value is updated to `YES`.

The item location details (as well as other item information) are updated based on batch input parameters. The current item location information (before submitting the batch) is stored in the in the ADM record (Permanent information field). The ADM permanent information field allows restoring permanent location information using the GUI-Circulation-Restore Item Information tool.

The ADM permanent information is not updated in the following cases:

- If there is already an ADM permanent information in the ADM record
- If current item record (the one before submitting the batch) is set to **Temporary Location**.
- **Change to Permanent** – the Item Temporary location value is updated to No.

Item location details are updated based on batch input parameter and HOL 852 information (if it exists). HOL 852 overrides batch input values.

There is no restore from the ADM permanent information record.

The item permanent information (if it exists) is cleared from the ADM record.

The manage-62 batch can be activated with by selecting **Change to Permanent** for items with HOL 852 linkages over group of items without filling other batch substitution fields. The batch execution restores the location information from the HOL 852 information.

### **Advanced Update Item Records (manage-63)**

Similarly to Update Item Records (manage-62) service, this service takes an individual Item Record or a set of Item Records and substitutes the data in fields according to the requested substitutions.

The Advanced Update Item Records (manage-63) service supports updating more fields than Update Item Records (manage-62) service, and produces reports of the updated / rejected items.

### **Report of Missing Items (ret-item-02)**

This service identifies items that are missing (process-status = "MI"/"MS") or were declared missing but were subsequently found. The service retrieves items that have the code "MI" or "MS" in the item processing status field. The report can include the current state of the item records (Include Inventory), and/or item history records (Include Items History).

### **Print Item Labels (item-03)**

This service takes an input file of document numbers and creates various kinds of labels, according to the user's specifications.

### **Shelf Reading Report (item-04)**

This service performs an inventory check based on a shelf range of items. It compares an input file of barcode numbers to the same range of items in the system and generates a report of all items which are missing, misshelved or loaned.

The service's parameters are: Call No., Location From/To, Call No. Type, Call No. First or Second, Sublibrary, Collection, Item Status and Item Process Status.

All error messages can be found in the file \$aleph\_root/error\_lng/p\_item\_04.

If the user marks Yes in the Update Database field, then each item that is found to be missing or misshelved has the run date added to its Z30-LAST-SHELF-REPORT-DATE.

### **Shelf List (item-05)**

This is a procedure for performing a shelf list inventory check. The shelf list is based on a shelf range of items. The procedure checks the library's holdings and circulation files and creates a report of all items which should be in the shelf range.

The Call Number of the item is taken from the item's (Z30) Call Number field. The check can be limited so that it only checks the holdings of a specific sublibrary, collection or loan status.

### **Rebuild Call Number Index (item-06)**

This service rebuilds the location keys in the Item (Z30) records.

#### **When to run this service:**

Run this service after changing the definition of filing routines for items (using table `tab_filing_call_no` in the `data_tab` directory of the Administrative library).

### **Smart Barcode Export (export-03)**

This service prepares a file intended for transfer to an external program for printing barcode labels. The data included in the file is set in a configuration table and can be output in XML or fixed table format.

### **Inventory List (item-07)**

This service creates an inventory list of all items which have arrived within a defined period, usually one year. Order, invoice, and inventory information is brought together in one place. Thus, the inventory list serves as proof of holdings of a title. An inventory list consists, at the minimum, of the order slip, which is supplemented by the inventory number, the invoice number and the inventory date. The list is then bound together, sorted in ascending order by inventory number.

### **Delete Item Records (item-11)**

This service deletes batches of items, based on an input file. The items are checked for active hold requests, booking requests, photo requests, whether the item is loaned and whether or not a claim has been sent for the item.

If the item is found to be loaned or claimed, then it cannot be deleted. This cannot be overridden.

If the item is found to have one or more request, the request will be checked to see if it can be fulfilled by another *like* item. In the event that no *like* item is available, the item is not be deleted, unless an override has been requested in the services input

parameters. If the override flag is set to *Y*, then the item is deleted and a notification message is sent to the patron.

### **Inventory Definition (item-01)**

This service marks a range of items as belonging to an inventory according to various criteria. The items which are identified as belonging to an inventory have their Z30-SHELF-REPORT-NUMBER field marked with the inventory number. This is the first stage of the Inventory Management functionality.

This service also produces a report containing the shelf report number assigned, the batch parameters and a list of the shelf report numbers of Item records (Z30-SHELF-REPORT-NUMBER) which have been replaced by the new shelf report number, if a previous report number exists.

### **Inventory Marking (item-08)**

The service is used for marking inventory items as found. The service receives an input file of item barcodes, located in the ADM library's `data_scratch` directory, and an Inventory number (shelf report number) to work on. In addition, you can choose whether or not to produce an error report in the `data_print` directory of the ADM library, and to provide the report file name. Other parameters are a list of lost/missing process statuses and error types to include.

### **Inventory Summary (item-09)**

This service creates a summary report of the inventory status, and allows updating inventory items process status according to the inventory check results.

The summary report includes the following information:

- Shelf Report Number
- Selected Sort option
- Total number of items in the inventory
- Number of items found
- Number of items which were not found and are not accounted for
- A list of the items not found

An item is considered accounted for if one of the following is true:

- It is on loan
- It is on the Hold Shelf
- It has a process status of lost or missing
- It has been returned within re-shelving time

### **Inventory Report (item-10)**

This service produces a report of the inventory items, consisting of each item's details and whether the item was marked as found or accounted for (on loan, on hold shelf, process status *missing*, and so on).

