A Simple Serials Workflow in ALEPH v. 18 - # 1
Prediction pattern creation method: Cataloging

A – Finding a bibliographic record to work with
1. **In the Serials Module**, select the *Find* tab and locate a record (please use titles from *Serial titles for hands-on practice*)
   - Click on the *Show* button and, then click on the *Serials* button (note that there won't be a *Show* button if your search retrieves an exact match).

B- Creating a subscription record and a basic holdings record
In the Serial Tab, select *(L) Subscription List* and click on the *Add* button
   - In Tab 2, complete the following mandatory fields: Sublibrary, Item Status, Vendor Code, and From/To Dates (note that Delivery Type will be required too, if it was not copied automatically from the Vendor record).
   - Also complete the following Tab 3 'nice-to-have' fields: Claim Intervals, and the Send Claims radio button. Select "Y"
   - Also complete the Copy ID field in Tab 3. It is not mandatory, but will be used by the system if you want it to generate Summary Holdings automatically.
   - Click on the *Add* button
   - In Tab 4.(Hol Links), click on the *Create New* button
   - Click on the *Edit* button
You will be taken to the Cataloging module.

C- Completing fields in the holdings record, including a prediction pattern
2. **In the Cataloging Module,** right-click and select *Expand from template* – choose a template – complete the template with 853, 853X and any other relevant Serials Holdings fields. Also complete field 852 (Location):
   For field 852: call number ($$h etc.) is copied from the 050 field in the bibliographic record, if it exists; $$b (sublibrary) is mandatory (and may have been copied automatically from the Subscription record).
   Remember your Cataloging training: to call up a new subfield to fill in $$b, use F7 (or use the menu options that are available when you right-click with your cursor on the 852 field); to call up a list of allowed values in $$h, use CTRL+F8.
   After you finish editing the 852 field, send the Holdings record to the server.

D – Previewing the prediction, and opening items accordingly
3. *In the Serials module*, under *(S) Subscriptions* in the left-hand pane, select *(P) Patterns*.
   - In the upper right pane, click on tab 2.Level-X.
   - In the lower right pane, select the 5.Expected Schedule tab and look at your description.
   If it looks good, click on the *Open Items* button.
   If it doesn't, switch back to Cataloging to correct your 853/853X fields, and send the Holdings record to the server again.

E – Arriving issues

4. In the left pane, click on the (K) Check-in node, under (O) Control [Pattern HOL]. Notice how the system highlights the expected issue for the current month. Scroll up the list until you highlight the first issue in the prediction.

5. In the lower pane, check your 2.Arrival Form tab and make sure the Material Type is ISSUE, and then click on the *Arrive* button in the upper right pane. To complete the arrival, click on the *Arrive* button in the lower right pane. You will get a log window which you can then close.

6. You may also use *(P) Group* on the left-hand pane. It allows multiple selection of issues (*SHIFT + TAB* for contiguous, and/or *CRTL + TAB* for non-contiguous issues), and the *Arrive* button.

F – Checking what it all looks like to the end user

7. To check your results, look at your record in the OPAC.