USER DOCUMENTATION (ALEPHINO 4.1) TRAINING MATERIAL

Serials management

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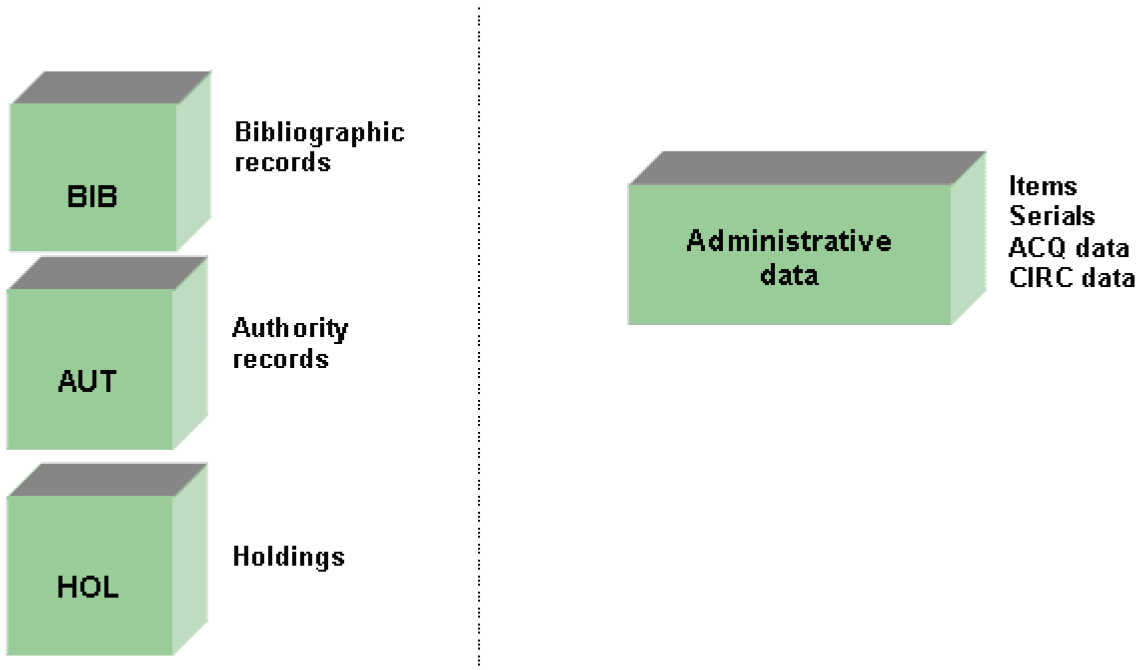
1 Introduction

1.1 Database structure

The Alephino database contains bibliographic records, authority records, holdings and administrative data, devided into different interlinked master files. Depending on the type of the records, the format of the records differs. Bibliographic records, authority records and holdings records are stored in MARC21 format. Administrative data are stored in Alephino format. Administrative records are for example items, acquisitions data like orders, invoices, vendors, and circulation data like partons, loans or requests.



There are the following bibliographic master files:

TIT (titles)
AUT (authors)
MEX (items)
SUB (subjects)
CLA (classification)
THS (thesaurus)
PER (persons/thesaurus)
ORT (places/thesaurus)
LND (countries/thesaurus)
MAT (materials/thesaurus)
ZTR (time periods/thesaurus)
HOL (holdings)

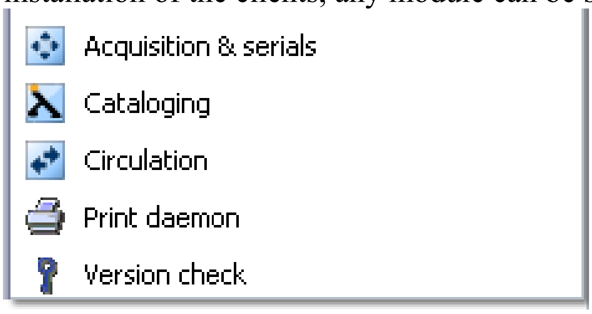
Next to this bibliographic data there is the administrative data for the circulation which is kept in the following master files:

BEN (patrons)

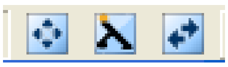
PRM (patron priviliges)
ADR patron addresses)
VBU (loans)
VOR (requests)
GBS (fines)

1.2 Overview over the modules

Alephino has a modular structure. There are clients based on Windows which have a graphical user interface – short GUI. These clients are used by the library staff users when they are working in Acquistions and Serials, Cataloging or Circulation. After installation of the clients, any module can be started from the Windows start menu.



If one module is open, icons for the other ones appear at the bottom of the screen, within the operations bar. By clicking on these icons, the module will start or, in case that it is already open, it becomes the active one.



 Acquisitions & Serials

The icon with the four arrows represents the Acquistions and Serials module. This module includes ordering, inventory management, invoice handling, claiming and other acquisition related services as well as the serials management, where the staff user can manage subscriptions, control issues and items, manage routing and claiming. Budgets, vendors and currencies are managed within this module.

 Cataloging

The cataloging module is used to create, update, duplicate or delete bibliographic records as well as authority records. In addition, holdings and items records are managed here.

 Circulation

The icon with the two arrows represents the Circulation module. In this module, loans and returns are performed, requests are managed, and patrons are administrated as well as cash transactions.

2 Serials overview

Serial issues in Alephino are treated as item records. An item record includes information such as ownership (sublibrary), location (collection and call number), status for loans, and barcode identifier. In addition, the identifying characteristics of a serial item record are:

- Description (for example, v.17: no.3 (1993:Mar.)); the description is displayed in lists of items and informs staff and patrons about what is available in the library.

- Link to subscription record; the link is required for correspondence with the vendor. If there is no link, the item cannot be claimed.

- Enumeration and chronology information. This data is used together with pattern information to build the description field.

Alephino Serials Control includes check-in and claiming of serials issues. In order to be able to accomplish this task efficiently, the system must be able to generate expected serial issues automatically.

A **Subscription Record** is also required for automatic generation of serial issues.

2.1 Records in the Serials Module

The Serials module uses several types of records, all of which are linked to the BIB record:

Subscription Record

The Subscription Record contains information relevant to a specific subscription of the serials for example held by the library, including the vendor, subscription period and location. The library must have one subscription record per item.

Schedule (Form)

The "schedule" form is a proprietary pattern format specific to the Alephino system. A schedule record is accessed only from the Control node in the Serials tab in the Acquisitions/Serials module. A schedule record is accessed only from the "Control" node in the Serials tab.

The Publication "Schedule" Form is best used for simple patterns. For example, it can be used for regularly published weekly, monthly, bi-monthly or quarterly journals, with no exceptions (such as "not published in August").

Patterns (Fields)

"PATTERN" uses the MARC21 Caption and Pattern fields (853/4/5) or (853X/4X/5X). Level-X (863) can contain a link to a special Subscription.

Routing Lists
Routing lists for the distribution of issues can be created for a subscription record. A subscription record can have multiple routing lists. Creation of routing lists is optional.

Item Records
Every item record represents one physical issue received by the library.

2.2 Records Required for Serial Prediction

In order that the system be able to generate serial issues records automatically (a prerequisite for efficient check-in and claiming), two types of records are required:

- Subscription
- Publication Prediction Pattern

Alephino supports two types of publication prediction pattern records, which we call 'Schedule' and 'Patterns'. A single serial record can have related prediction data in **either** Schedule **or** Pattern format, but not both. It is possible to use the schedule form for a serial with simple publication prediction and the Patterns form for an other serial (with complex publication prediction) .

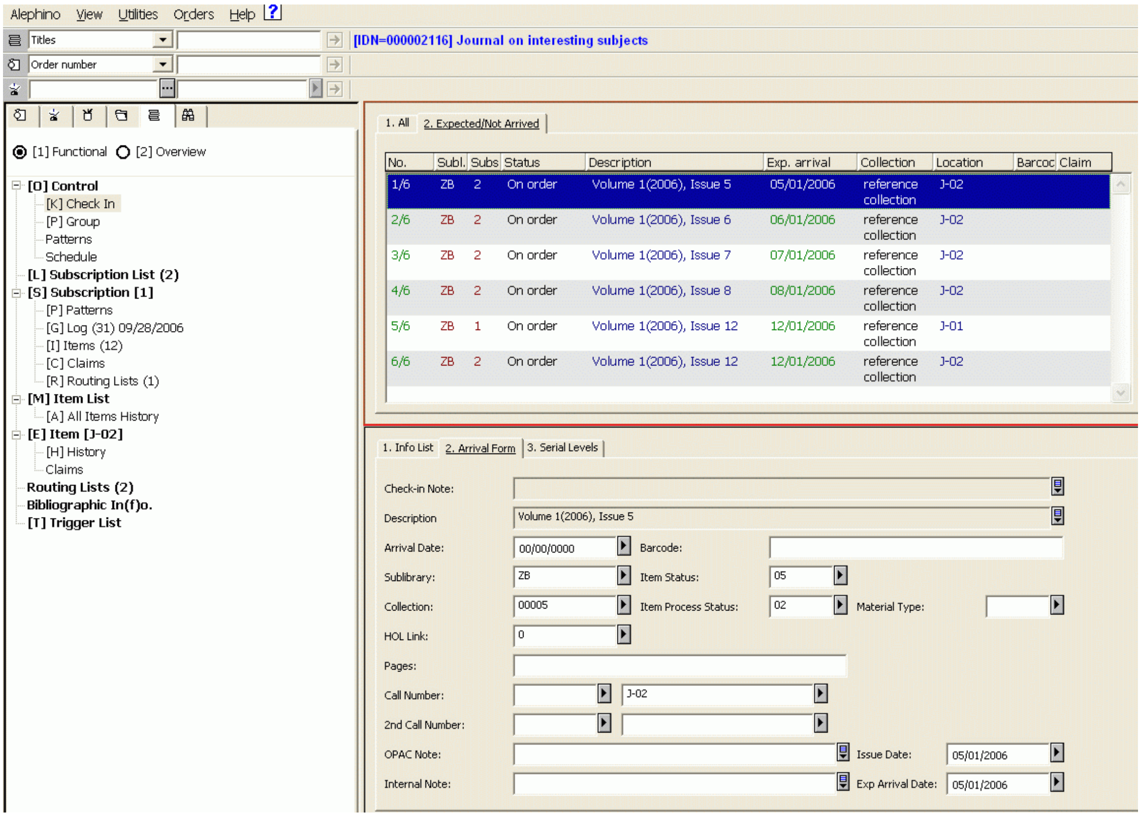
3 Accessing the serials function and serials records

This chapter includes the following sections:

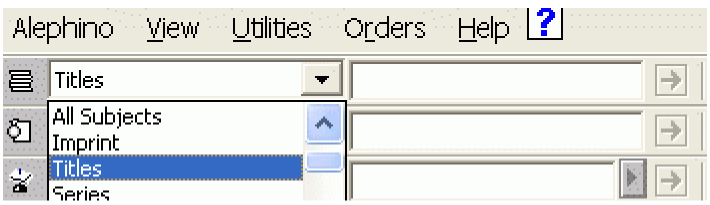
- Serial Bar
- Search Tab
- Cataloging Record Manager
- Overview Mode

3.1 Serial bar

The Serial Bar in the Acquisitions/Serials module is the environment in which you can search for a record and display it in the Serials tab:



In the Serial Bar, choose a search option, and enter the search text:



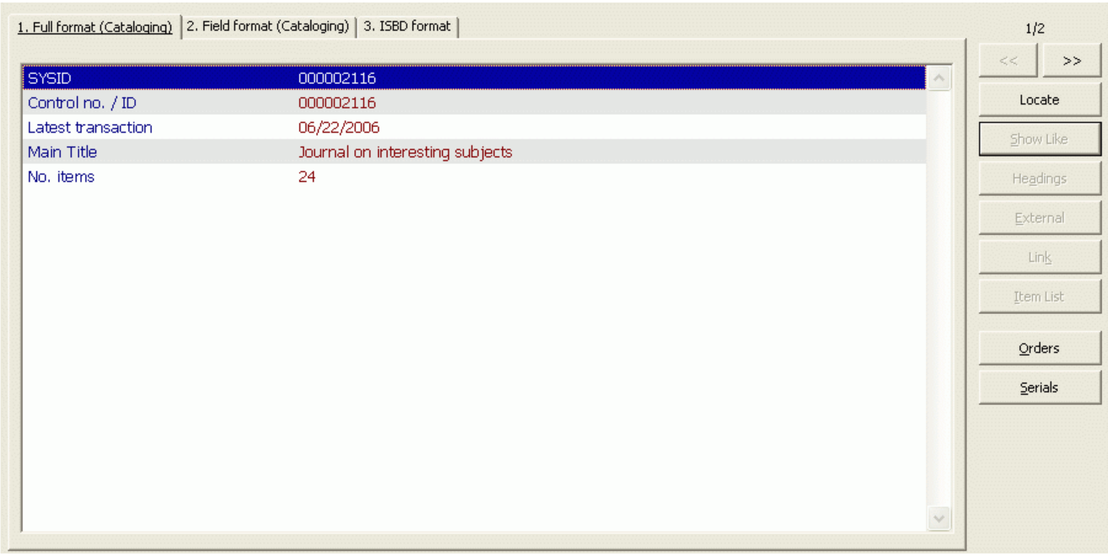
If the search retrieves a single record, it is displayed. If the search retrieves multiple records, a window pops up informing you "Multiple matching records found. View in the brief list?" If you choose Yes, the set of records is displayed in the Brief List in the Search tab.

3.2 Search Tab in all modules

The Search tab is available in all modules. The Search function provides simple and sophisticated searching for records.

There are two ways to find records in the Search tab. You can either search (find) by keywords, or browse) an index.

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

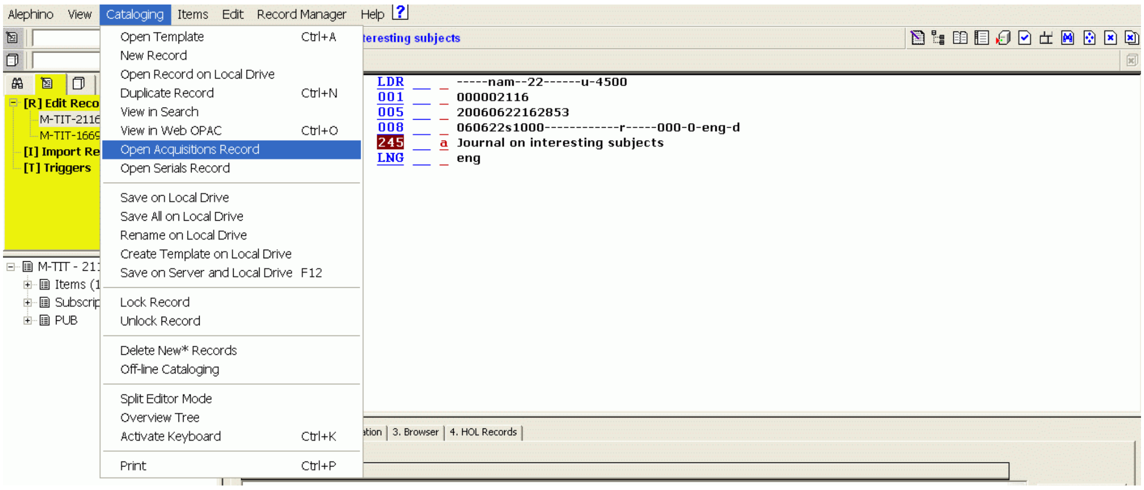


3.3 The cataloging record manager

To access a serials record from Cataloging:

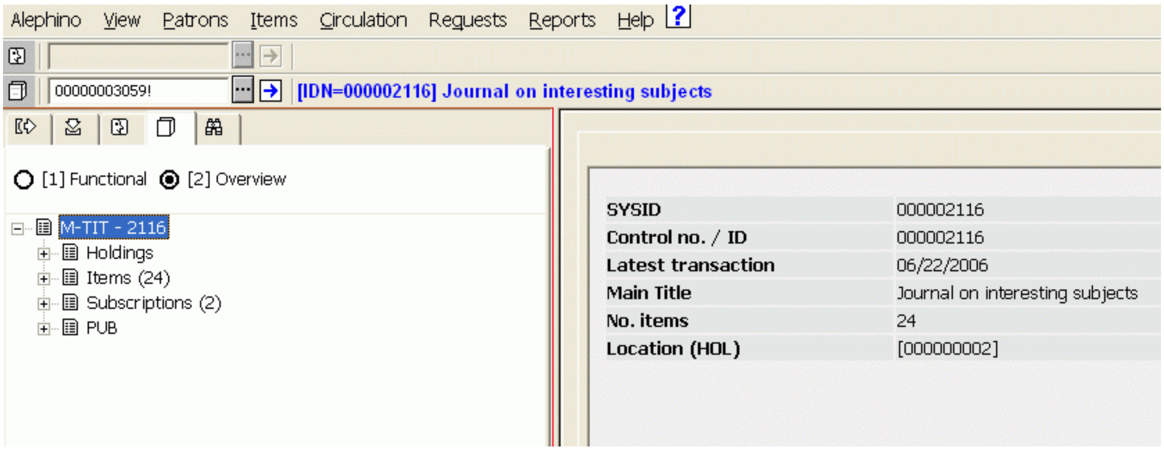
1. Choose the relevant record in the Record Manager pane.

2. Open the Cataloging menu, and choose "Open Serials Record".



3.4 Overview mode

A record can be "transferred" to another module or function. This can be done when the relative module change in Overview mode and by clicking the "–>Serials " button.



4 Subscriptions

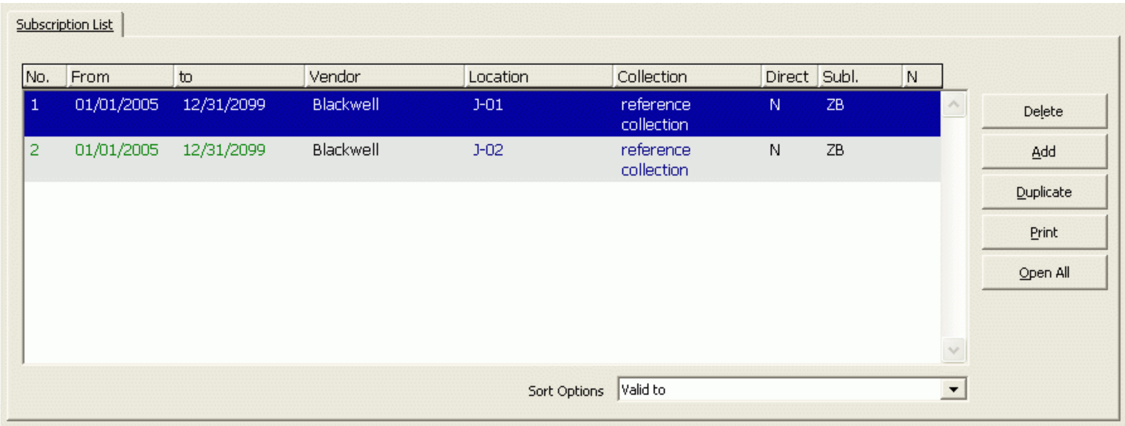
This chapter includes the following sections:

- Subscription List
- Subscription Record Structure
- Subscription Log

A subscription record is required in order to generate serial items based on prediction patterns automatically, and for claiming purposes. The subscription record contains information to a particular serial subscription such as sublibrary, item status and call number. The Library must generate a record with subscription data for each serial item.

4.1 Subscription list

Subscriptions are listed in the upper pane. If no subscriptions have been registered, the upper pane is blank.



Each subscription has a unique identifying sequence number.

The following buttons are available on this pane:

Delete

To delete a subscription, highlight the subscription and click **Delete**. Note that you may not delete a subscription if associated item records exist.

Add

To add a new subscription to the list, click **Add**. The focus is transferred to the lower pane, so that you can add the new subscription's details.

Duplicate

You can add a new subscription by copying an existing subscription's details. To do this, highlight the subscription whose information you wish to copy, then click **Duplicate**. The lower pane will be activated for the new subscription, with some of the fields filled in with information copied from the highlighted subscription. You can then edit the details so that the information is appropriate for the new subscription.

Print
To print the subscription details, click **Print**

Open All
In order to open a new cycle of expected items for a particular subscription, highlight the subscription and click **Open All**. The expected items will be displayed in the **Check-In** and **Items List** forms. Note that items will be opened for active subscriptions, for a cycle (year), even if a subscription period is terminated before the end of the year.

Sort Options
You can change the order of the subscriptions according to the options available in a drop-down menu of the *Sort Options* field.

Note: If you have used *Duplicate* to add a Subscription, or if you saved Subscription default values (by having clicked the "Save as Default button"), or if you are creating the subscription from the Order tab, some of the fields will already be filled in.

4.2 Subscription record structure

The Subscription record fields are contained in tabs 2 and 3 of the Subscription Information form.

4.2.1 Subscription Information Form

This form displays details relevant to a specific subscription of a serial title. It also defines various parameters relating to the issue-items connected to the particular subscription.

The Subscription Information tabs have the following buttons:

Update
The *Update* button saves all changes you have made to a specific subscription.

Create New
This button allows you to create a new subscription based on the highlighted subscription in the Subscription List pane. This button is only available if you are in Modify mode. Use this option if you wish to reassign this subscription to another sublibrary or vendor. Fill in the new sublibrary, vendor and dates, and then click *Create New*.
The information about the original sublibrary and vendor will be saved in the opened subscription record saves, and a new record is opened with information about the new sublibrary or vendor.

To use this function properly, you must set the opening (From) date of the new subscription. The system will modify the closing (To) date of the original subscription accordingly.

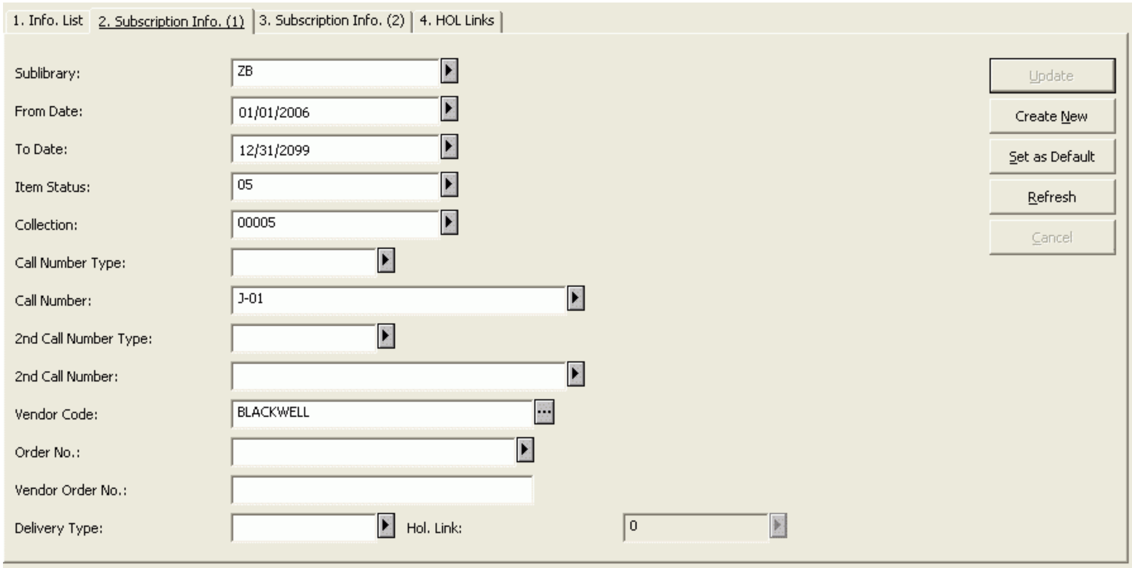
Set as Default

If you click **Set as Default**, the system saves the values that appear in all fields and enters them into each new Subscription record that you add.

Refresh

If a system counter is used for the Call Number field, clicking this button enters the contents of that counter into the Call Number field.

Subscription Info. (1) Tab



The fields on the Subscription Info (1) tab are:

Sublibrary

This field contains the sublibrary to which this subscription of the serial is assigned. To select from a list, press F4 or click the arrow to the right of the field.

From Date/To Date

These fields contain the dates between which the subscription is valid. Items are automatically generated for the subscription only when the publication date of the first issue falls within this date range.

Note: when a subscription is created in the Acquisitions/Serials module, the dates are copied from the Subscription Start and End dates entered on the Order Form.

Item Status

This field contains the item status for the items that are generated for this subscription. The item status defines, among other things, how long an issue can be checked out. To select from a list of item statuses, press F4 or click the arrow to the right of the field.

Collection

This field contains the collection for the items that are generated for this subscription. To select from a list of collections, press F4 or click the arrow to the right of the field.

Call Number Type

This field contains the call number type value for the items that are generated for this subscription. To select from a list of call number types, press F4 or click the arrow to the right of the field.

Call Number

This field contains the shelf location value for the items that are generated for this subscription. Depending on system setup, you can assign a location by typing in text, choosing from a drop-down menu, filling in a form, or activating an automatic counter by typing *?* and the code of the counter. When a counter is activated, the system automatically assigns a call number as soon as you click the Refresh or Update button.

2nd Call Number Type and 2nd Call number

See Call Number Type and Call Number

Vendor Code

The vendor that supplies this subscription is entered in this field. To select from a list of vendors, click the List button to the right of the field. A vendor code is mandatory if automatic claiming is set to **Yes**.

Note: when a subscription is created in the Acquisitions/Serials module, the vendor is copied from the Order.

Order No.

The Acquisitions Order Number is entered in this field. To select from a list of orders linked to this title, press F4 or click the arrow to the right of the field. You can manually enter an order number in this field.

Note: when a subscription is created in the Acquisitions/Serials module, the order number is copied from the Order.

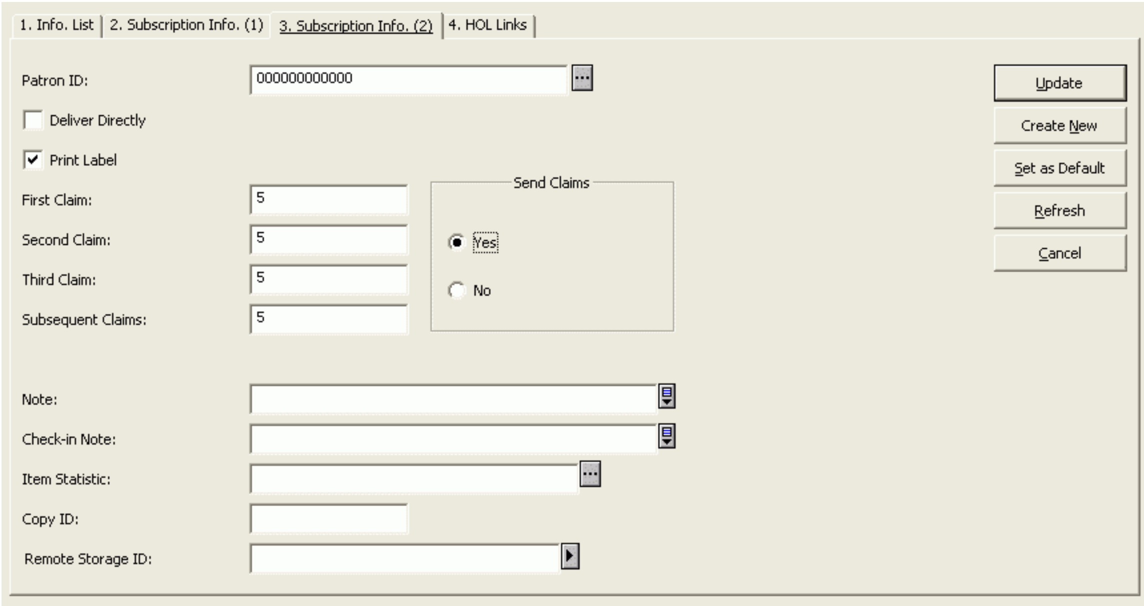
Vendor Order No.

This field can contain the order number for this subscription of the serial as assigned by the vendor.

Delivery Type

This is the method by which the subscription is delivered to the library. To select from a list of delivery types, press F4 or click the arrow to the right of the field.

Subscription Info. (2) Tab



The followings fields are available on the Subscription Info (2) tab:

Patron ID

If this subscription of the serial is being ordered for a particular Patron, enter. You can select a patron from the drop-down menu, accessed by clicking the arrow button to the right of the field.

Deliver Directly

If you select this option, the vendor will send a newly-published issue directly to the person for whom this copy was ordered (that is, to the person entered in Patron ID above). In addition, item records will not be opened.

Print Label

If you select this option, a label will be printed automatically when the arrival of an issue is registered.

Send Claims

If you select the Yes option, then claims for late items of this subscription are sent (Web Service Module / Menu Serial Tab / Function "Automatically Claim list for Serial Item"). If you select No, claims are not sent. However, the items will appear in the claim report (serial-04).

First Claim

Enter here the number of days after the issue date of each issue when you wish the system to automatically send a first claim to the vendor (only if the Send Claims option was selected). This field can also be described as the delay period from the Issue Date to the Expected Date of Arrival of each issue in the library.

Second Claim

This is the number of days after the First Claim that a Second Claim should be sent to the vendor.

Third Claim

This is the number of days after the Second Claim that a Third Claim should be sent to the vendor.

Subsequent Claim
This is the number of days after the Third Claim that a Fourth Claim and subsequent claims should be sent to the vendor.

Note
This field is intended for a staff note.

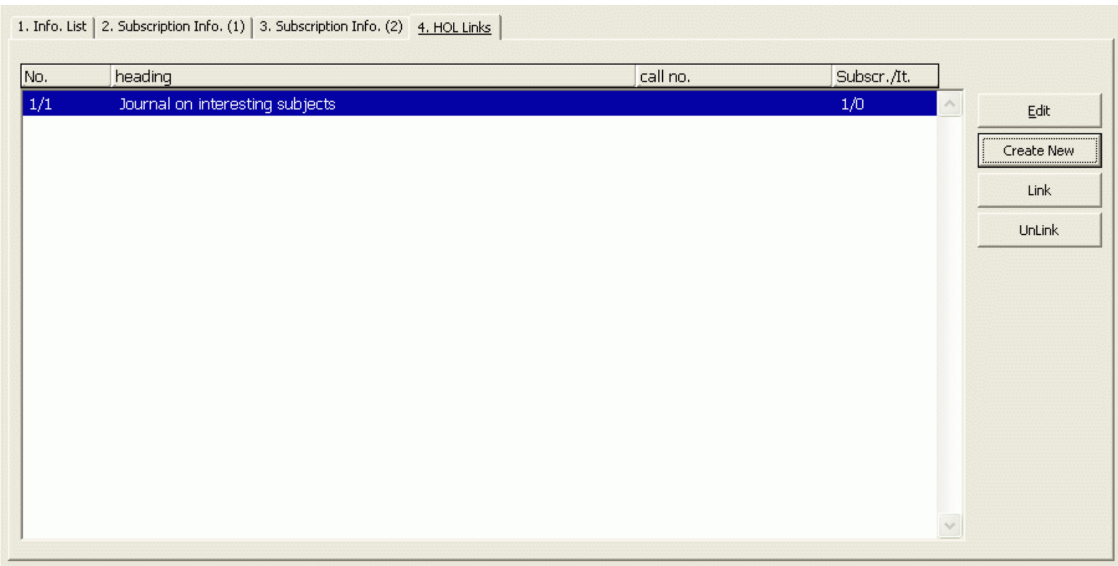
Check-in Note
The note you enter here will be displayed when the issue displays for check-in.

Item Statistic
Enter here any statistical data for this serial subscription. The value entered here populates the same field in items that are automatically generated.

Copy ID
Enter here the ID number for the specific copy/subscription. This can be either the number assigned by the vendor or the number assigned by your library. The value entered here populates the same field in items that are automatically generated.

Remote Storage ID
If issue items received for this subscription are going to be stored in remote storage, enter here the relevant remote storage code for this subscription. The values entered here populate the same field in items that are automatically generated.

HOL Links Tab



The HOL Links tab is used to link a subscription to a HOL record. The HOL record is optional.

When a subscription is linked to a HOL record, all issue items belonging to that subscription are linked to that HOL record

To add a new HOL record for a subscription:

1. Click **Create New**.

2. Click **Edit**. The holdings record cataloging draft is displayed in the Cataloging module, changing and saving to the default values set in the subscription record.

3. The HOL records that are linked to a subscription appear in the HOL links tab with a check mark in the Sub/Item column.

The following buttons are available on the HOL Links tab:

Edit
In order to edit an existing HOL record, highlight the record and click *Edit*. The system opens the relevant HOL record in the Cataloging module where you can edit and resend it to the server.

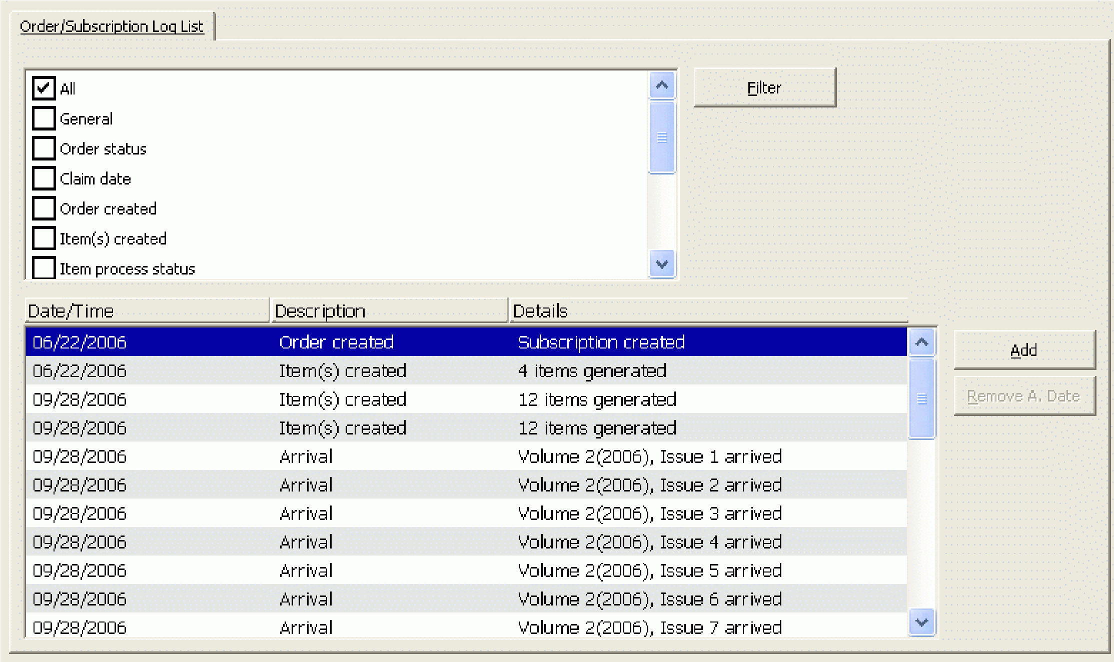
Create New
You must first highlight the subscription in the list and then click **Create New**.

Link
If there already are HOL records in the list, you can link the subscription by highlighting the line and clicking **Link**.

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

4.3 Subscription log

The Subscription Log keeps track of various subscription-related activities that have occurred, such as a change in the subscription or the Issue Check in. It is accessible by clicking the Subscription node on the Serials tab. If the subscription is linked to an order created, the Subscription Log also displays order-related transactions.



4.3.1 Subscription Log List (upper pane)

The following buttons are available:

Filter

You can filter the transactions displayed on the list by selecting any of the options and clicking **Filter**. Note that you can select more than one filter. If you select **All**, this overrides any other filter selected previously. In the same manner, if you select any filter other than **All**, this overrides the selection of the **All** filter.

Add

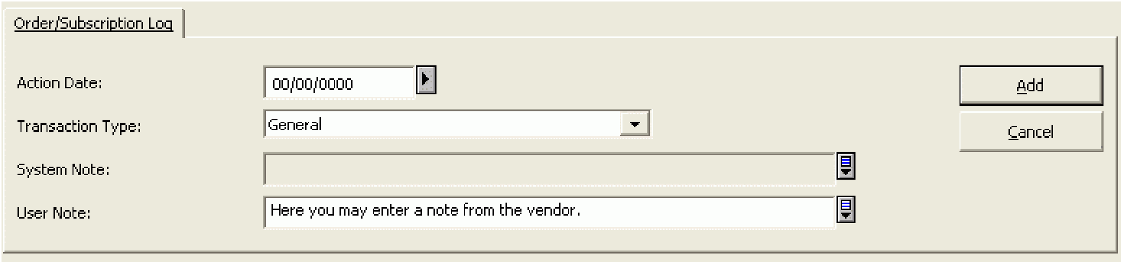
You can manually add a transaction to the subscription log. Click *Add* and enter the details of the new transaction in the lower pane.

Remove A. Date

You can remove a previously entered Action Date by selecting the relevant log transaction and clicking this button.

4.3.2 Order/Subscription log (in lower pane)

The Order/Subscription Log displays details relating to a transaction log highlighted in the upper pane. You can manually add a new transaction log or update details relating to the highlighted log.



Action Date

You can add an Action Date to any of the manually entered log transactions. Action date Log is accessible by clicking the Action Log Message node on the Aministration tab.

Transaction Type

To manually add a transaction to the Order Log, select the appropriate type from the list.

You can choose from two types, which won't be generated automatically from the system.

- General Note
- Note to Vendor, summarize here any correspondence you have sent the vendor (maximal 2000 characters)

System Note

It is a only-read-field. The System Note is automatically created by the system.

User Note

Enter here the full text of the General Note.

5 Prediction patterns

This chapter includes the following sections:

- Prediction Patterns - Workflows
- Publication Pattern Fields

In order that the system can generate serial issue records automatically (a prerequisite for efficient check-in and claiming), the system requires two types of information: subscription and publication prediction pattern. In Alephino, every copy of every issue of a serial must have an item record to enable check-in, claiming, and circulation activities.

In order to predict the publication dates of the serial's issues correctly, you have to define the publication pattern of the serial, based on previous experience or on published information.

Alephino supports two types of publication prediction pattern records: **Schedule** and **Patterns**. A single serial record can have related prediction data in **either** Schedule **or** Pattern format, but not both. It is possible to use the schedule form for a serial with simple publication prediction, and the Patterns form for another serial (with complex publication prediction).

Schedule (Form)

"SCHEDULE" is a proprietary pattern format, specific to the Alephino system. The form is accessed from the "Control" root in the Serials tab.

The Publication "Schedule" Form is best used for simple patterns. For example, it can be used for regularly published weekly, monthly, bi-monthly or quarterly journals, with no exceptions (such as "not published in August")

Patterns (Fields)

"PATTERN" uses the MARC21 Caption and Pattern fields (853/4/5) or (853X/4X/5X). Level-X (863) can contain a link to a special Subscription.

5.1 Prediction patterns – workflows

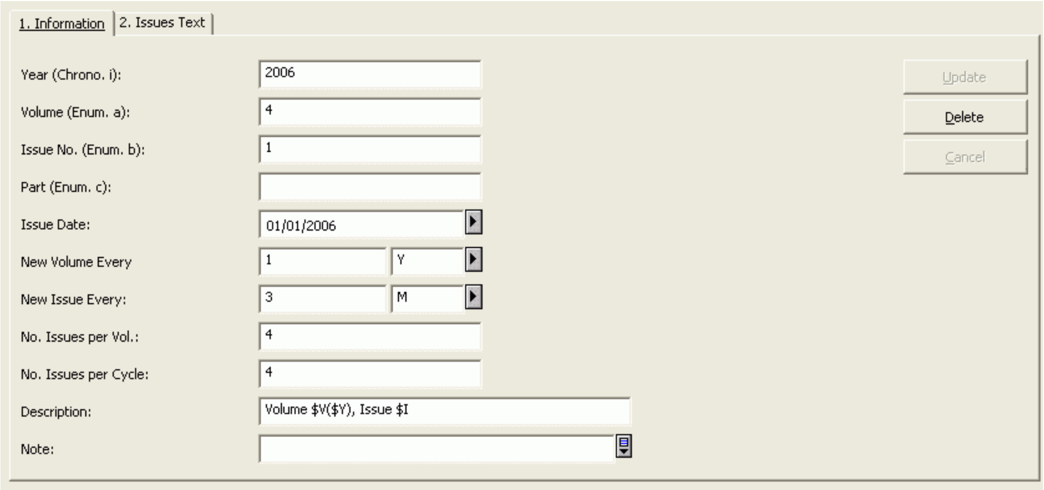
As previously stated, Publication Prediction patterns can be registered in a **Schedule** form, or in **Patterns**. This section describes the workflows for registering publication prediction patterns for these two options.

5.1.1 Schedule (Form)

The form is accessible by clicking the Schedule node on the Serials tab in the Acquisitions/Serials module. You can create or update here a schedule record in the upper pane. In the lower pane you can see a list of the next cycle of anticipated items (issues).

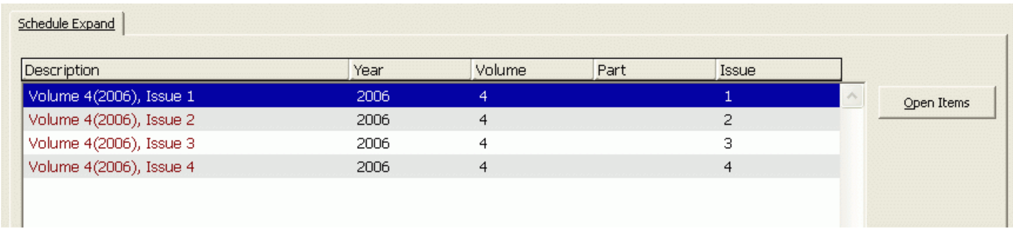
To create or update a schedule record:

1. Fill in the fields in the Schedule Form:



2. Click the **Add** or **Update** button. Take note of the lower pane in which the cycle of issue items that will be generated is displayed. If the issue items are incorrect, update the Schedule fields and re-check the display in the lower pane.

3. Click the **Open Items** button on the lower pane to create the issue item records.



Description	Year	Volume	Part	Issue
Volume 4(2006), Issue 1	2006	4		1
Volume 4(2006), Issue 2	2006	4		2
Volume 4(2006), Issue 3	2006	4		3
Volume 4(2006), Issue 4	2006	4		4

The fields in the **Publication Schedule Form** are:

Information Tab

Year

This field contains the journal year for the next publication cycle (that is, volume). The year must contain four digits (for example, 1999, and not 99). A hyphen is used to indicate that a volume runs from the beginning of one year to the end of the following year (for example, 1999-2000), a slash is used to indicate that a volume starts at some point within one year and ends 12 months later in the following year (e.g., 1999/2000).

This field is mandatory.

Volume

This field contains the number of the first volume that will be received during the year stated above. For example, the library's subscription might start with volume 16.

If the serial does not have volume numbering, this field should be left blank.

Issue No.
This field contains the number of the first issue in the cycle.

Part
This field contains the issue part, if the serial is organized in this manner.

Note: although alphabetic values can be entered in the Volume and Part fields, only numeric values are automatically incremented.

Issue Date 1
This field contains the approximate date on which the first issue in the cycle is published. This is the basis for calculating the **Expected Date of Arrival (EDA)** for each issue.

New Volume Every
This field determines how many volumes are published within a calendar period. For example: "New volume every 6 M(onths)"; "New volume every 1 Y(ear)."

New Issue Every
This field determines the number of issues that are published before issues are numbered again from 1. For example: "New issue every 2 W(eeks)"; "New issue every 1 M(onth)

No. Issues per Volume
This field determines the number of issues that are included in one volume.

No. Issues per Cycle
This field determines the number of issues that are published before issues are numbered again from 1. For example, in a monthly serial, after issue number 12, the issue cycle may start over again and the next issue will be issue number 1. In this case, the cycle is "12". If the numbering is continuous, enter the code "999".

Description
This field contains a template that determines the contents in the description field of the item record. The field uses a series of placeholders: $Y for year, $V for volume, $I for issue, $N for issue name, and $D for date. In addition, you can enter words, abbreviations, punctuation and spaces. For example:

Vol. $V, no. $I, ($Y).
will be displayed as: Vol. 3, No. 2, (2006).

v. $V:no $I($Y: $N)
will be displayed as: Vol. 3:No 2(2006:Febr.)

Note that the $N code is used to display the text from the Issue fields entered in the "Issues Text" tab of the Publication Schedule Form. This means that if you enter text in the Issue fields, you must also enter the $N code in this Description field.

For example: for a quarterly serial, you may enter "Jan-Mar", "Apr-Jun", "Jul-Sep" and "Oct-Dec" in the Issue Text tab's first four fields, and enter the Description:

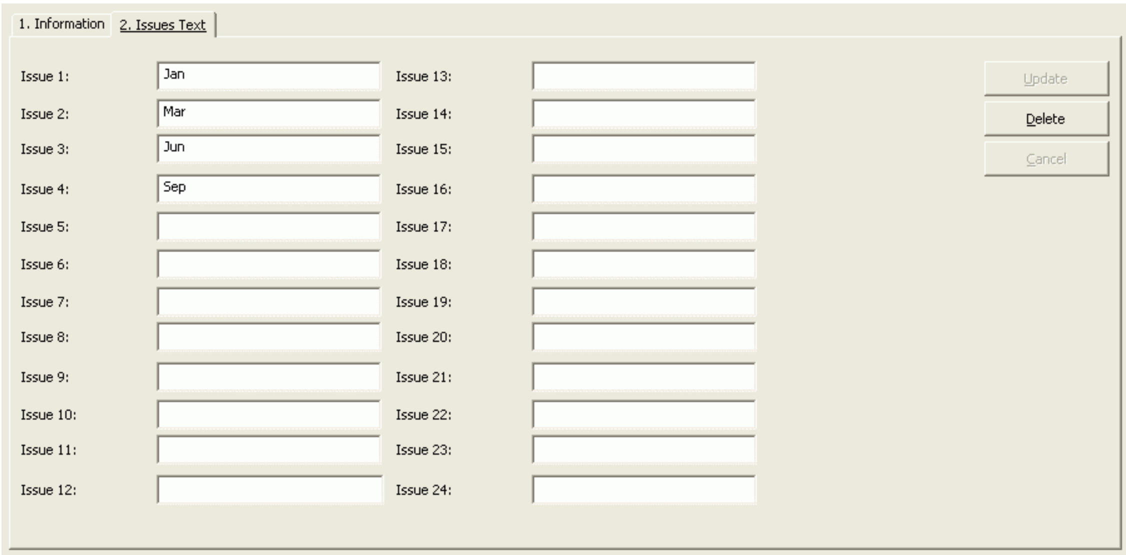
Vol. $V, no. $I ($N $Y)
which will be displayed as: Vol. 1, no. 2 (Apr-Jun 2006).

If the description field is left blank, the system automatically inserts a defined record as default value. The definition is specified in the ../etc/alephino.cfg, parameter "PublDescription" in Block:

```
(Acquisition)
Currency = EUR
CheckBudget = Y
CreateItem = Y
ArrivalForm = Y
ItemDefault = ../etc/itemdef.cfg
SerItemDefault = ../etc/seritemdef.cfg
PublDescription = Band $V($Y), Heft $I                  <<
```

Issue Text Tab

These fields are used for text describing an issue. The text is included in the description field in lieu of the $N placeholder. Issue text can be entered for up to 24 issues. Generally, this field will include a chronology description, such as a month or a season.



5.1.2 Publication pattern fields

The 85x/85xX Publication pattern fields ultimately reside in an BIB document record. The fields can be created or updated in two different ways:

- In the Cataloging module, on the cataloging draft display.

- In the Serials function, using the "pattern" and "Level-X" forms.

The two methods are compatible, and either can be used at any time.

Method 1 - Using Catalog Editor
In Cataloging, load an record or click navigate the record to push to Cataloging from the Serials module. Then open the 853 and 863 fields from the list (F5) You can open new forms (for both fields) by clicking Ctrl+F. You can also open the Help from the forms. You can create locale template records that contain these fields.

You can display the expected items of the next cycle and see if they are correct. Highlight whether 853 field or 863 field and choose the **Preview Publication Schedule** funktion in the **Edit** menu.

Method 2 - Using Input Forms
In the Serials Tab, open an record and chooe the "Control" Tab.(if the Level is for all subscriptions) or "Subscription" (if the level is only for the current highlighted subscrition) and choose the "Patterns" subnode

1. If the BIB record has not pattern, the text *Not filled* displays in "pattern" Tab. and the "Level-X" is empty. To create a neue Publication pattern, activate the "Level-X" tab in the upper pane and then the "Level-X" tab in the lower pane.

2. Fill in the fields in the Muster-Formular aus. Then click the **Edit** button in the form. The BIB record will be in the 853 field. See the section Patterns description.

3. Activate the "Level-X" Tab in the upper pane and click the **Add** button. The Form "Level-X" will be activated in the lower pane.

4. Fill in the fields of the Enumeration form. Then click the **Add** button in the form. The BIB record will be in the 863 field.

You can display the expected items of the next cycle and see if they are correct. Activate the **Expected Schedule** Tab in lower pane. You can see the items of the next cycle. In the case of they are not correct, edit the fields in the Level-X form and control the display in the lower pane.

When you click the **open items** button in lower pane, the items records will be created. The system will automatically increase the Level in the 863 field for the next cycle.

5.1.3 Publication pattern fields
The following section describes the 853 and 863 fields of a bibliography record. The fields are based on the 853 and 863 fields in MARC 21 but have been adapted in order to enable the Alephino system.

5.1.4 Overview of 853 and 863 fields
In Alephino, the 853 field is used to record enumeration and chronology captions and publication pattern codes.

The 863 field is used to record the numerical starting point (volume no., issue no., and so on), the chronological starting point (year, month, and so on) and the publication date of the first issue of the volume/year.

Using the 853 and 853X Fields Together

Every enumeration and chronology subfield used in the 853 field must have a corresponding subfield in the 863 field. For example, if a caption has been entered in subfield a of the 853 field, a corresponding number must be entered in subfield a of the 863 field.

5.1.5 Subfields of the 853 and 853X fields

This section includes two parts: an explanation of how to enter data in each subfield, and an explanation of how to use the subfields together.

Using Each Subfield

Subfield $a

Subfield $a is used for the first level of enumeration. Enter the appropriate caption in subfield $a of the 853 field and the corresponding number in subfield $a of the 863 field. For example, a publication that bears volume numbering beginning with vol.1 will have the caption "v" recorded in subfield $a of the 853 field and the number 1 recorded in subfield $a of the 863 field.

Subfield $b

Subfield $b is used for the second level of enumeration. Enter the appropriate caption in subfield $b of the 853 field and the corresponding number in subfield $b of the 863 field. For example, a publication beginning with v.4:no.7 will have the caption "no." recorded in subfield $b of the 853 field and the number "1" recorded in subfield $b of the 863 field.

It is important to define a full cycle (volume) even if your own collection starts mid-cycle. In that case, you simply ignore the issues you do not possess.

Whenever subfield $b is used, subfield $u must also be used to indicate the number of second-level units there are to every first-level unit (that is, how many b's there are to every a).

In addition, subfield $v must be used to indicate the numbering continuity ("c" defines numbering that is continuous over volumes and "r" defines numbering that restarts at the completion of the cycle).

For example, a quarterly publication that begins each volume with issue "1" should have the number "4" recorded in subfield $u and the letter "r" recorded in subfield $v.

Subfield $c

Subfield $c is used for the third level of enumeration. Enter the appropriate caption in subfield $c of the 853 field and the corresponding number in subfield $c of the 863 field. For example, a publication beginning with v.12:no.6:pt.1 will have the caption "pt" recorded in subfield $c of the 853 field and the number "1" recorded in subfield $c of the 863 field.

Whenever subfield $c is used, subfield $u must also be used to indicate the number of third-level units there are to every second-level unit (that is, how many c's there are to every b). In addition, subfield $v must be used to indicate the numbering continuity (where "c" defines numbering that is continuous over volumes and "r" defines numbering that restarts at the completion of the unit).

For the example of a publication that has two parts to each number and 8 numbers to each volume, you would set up as follows:

```
853     $$a v. ^$$b no. ^$$u 8 $$v r $$c pt. ^ $$u 2 $$v r
853X    $$a 12 $$b 1 $$c 1
```

Use the ^ character as variable for the enumeration. You decide, where the issue description displays the enumeration: her e.g. v. 12.

Subfield $d

Subfield $d is used for the fourth level of enumeration. Enter the appropriate caption in subfield $d of the 853 field and the corresponding number in subfield $d of the 853X field. For example, a publication beginning with v.4:no.7:pt.3 will have the caption "pt" recorded in subfield $d of the 853 field and the number "1" recorded in subfield $d of the 863 field.

Whenever subfield $d is used, subfield $u must also be used to indicate the number of fourth-level units there are to every third-level unit (that is, how many d's there are to every c). In addition, subfield $v must be used to indicate the numbering continuity, where "c" defines numbering that is continuous over volumes and "r" defines numbering that restarts at the completion of the unit.

Subfield $e

Subfield $e is used for the fifth level of enumeration. Enter the appropriate caption in subfield $e of the 853 field and the corresponding number in subfield $e of the 863 field.

Whenever subfield $e is used, subfield $u must also be used to indicate the number of fifth-level units there are to every fourth-level unit (that is, how many e's there are to every d). In addition, subfield $v must be used to indicate the numbering continuity, (where "c" defines numbering that is continuous over volumes and "r" defines numbering that restarts at the completion of the unit).

Subfield $f

Subfield $f is used for the sixth level of enumeration. Enter the appropriate caption in subfield $f of the 853 field and the corresponding number in subfield $f of the 863 field.

Whenever subfield $f is used, subfield $u must also be used to indicate the number of sixth-level units there are to every fifth-level unit (that is, how many f's there are to every e). In addition, subfield $v must be used to indicate the numbering continuity, (where "c" defines numbering that is continuous over volumes and "r" defines numbering that restarts at the completion of the unit).

Subfield $g

Subfield $g contains alternative enumeration information. In Alephino, subfield $g is used for continuous numbering only and does not need a corresponding subfield $u or subfield $v. Enter the appropriate caption in subfield $g of the 853 field and the corresponding number in subfield $g of the 863 field.

Example: A quarterly serial has both numbering that restarts and numbering that is continuous over volumes. The pattern begins with v.1:no.1= no.1; the next volume begins with v.2:no.1(=no.5). The number "1" in v.2:no.1 illustrates numbering that restarts; the "5" in "no.5" illustrates numbering that is continuous.

In order for the serial to be displayed as follows...

```
Description                      Issue Date
v. 12 no. 1 = no. 100            01/01/2002
v. 12 no. 2 = no. 101            04/01/2002
v. 12 no. 3 = no. 102            07/01/2002
v. 12 no. 4 = no. 103            10/01/2002
```

set up the 853/863 fields as follows:

```
853    $$a v. ^$$b Issue ^$$u 4 $$v r $$w q $$g= no. ^
863    $$a 12 $$1 $$g 100 $$3 20020101
```

Use the ^ character as variable for the enumeration. You decide, where the issue description displays the enumeration: e.g. v. 12.

Subfield $h

Subfield $h contains the second level of alternative enumeration information. Alephino does not take this subfield into account when generating issue item records. It must be typed manually in the item record.

Subfield $i

Subfield $i is used for the first level of chronology. Enter the appropriate caption in subfield i of the 853 field and the corresponding number(s) in subfield $i of the 863 field. For example, a publication that begins with v.1(2006) will have the caption "(year)" recorded in subfield $i of the 853 field and the number "2006" recorded in subfield $i of the 863 field.

Subfield $j

Subfield $j is used for the second level of chronology. Enter the appropriate caption in subfield $j of the 853 field and the corresponding number(s) in subfield $$j of the 863 field. For example, a publication that begins with v.3:no.2(2002:June) will have the caption "(month)" recorded in subfield $j of the 853 field and the number "06" (the code for the month June) recorded in subfield $j of the 863 field.

Subfield $k

Subfield $k is used for the third level of chronology. Enter the appropriate caption in subfield $k of the 853 field and the corresponding number(s) in subfield $k of the 863 field. For example, a publication that begins with v.1:no.1(2002:Jan.15) will have the caption "(day)" recorded in subfield $k of the 853 field and the number "15" recorded in subfield $k of the 863 field.

Subfield $l
Subfield $l is used for the fourth level of chronology. Enter the appropriate caption in subfield $l of the 853 field and the corresponding number(s) in subfield $l of the 863 field.

Subfield $m
Subfield $m contains alternative chronology information (for example the Gregorian and the Jewish years). Enter the appropriate caption in subfield $m of the 853 field and the corresponding number in subfield $m of the 863 field.

Subfield $t
Subfield $t is used only in the 853 fields as a caption for the sub.-Nummer.

Subfield $u
Subfield $u is used only in the 853 field and specifies the number of units per next higher unit. Subfield $u is numeric and must be repeated for each additional level of enumeration; only subfields a, g and h do not have a corresponding subfield $u.

The product (multiplication) of all subfield $u's should equal the value of the subfield $w (frequency) less whatever is omitted in subfield $y.

In the case of combined issues, the number in subfield $u should match the number of issues should there be no combining. For example, if nos. 3 and 4 of a quarterly publication are combined into one issue, subfield $u should be 4 (not 3).

Subfield $v
Subfield $v is used only in the 853 field and contains numbering continuity information. Like subfield $u, subfield $v should be repeated for each instance of subfields $b through $f.

Valid codes are "c" and "r", where "c" defines numbering that is continuous over volumes and "r" defines numbering that restarts at the completion of the unit.

Subfield $w
Subfield $w is used only in the 853 field. It defines the frequency of issues (in other words, the intervals between issues) and must be present. That frequency determines the publication date of all the items that are opened from the 853 and 863 fields (unless they are specified in subfield $y). The publication date of the first issue, as specified in subfield $3 of the 863 field, is the starting point for the calculation of issue dates.

The following frequency codes are valid in Alephino:

Code	Description	Interval
a	Annual	1 year
b	Bimonthly	2 months
c	Semiweekly	Twice a week
d	Daily	1 day

e	Biweekly	2 weeks (14 days)
f	Semiannual	6 months
g	Biennial	2 years
h	Triennial	3 years
i	Three times a week	Three times a week
j	Three times a month	Three times a month
m	Monthly	1 month
q	Quarterly	3 months
s	Semimonthly	Twice a month (the first day is the day specified in 863 subfield $3 and the second day is that plus fourteen)
t	Three times a year	4 months
w	Weekly	1 week

The frequency must equal or exceed the number of issues actually printed. In other words, if the serial is published eight times a year, bimonthly plus January and July, assign the frequency monthly to subfield $w, and in subfield $y, specify that four issues should be omitted.

The frequency can also be recorded as a number, provided that subfield $y is also used.

Subfield $x

Subfield $x is used only in the 853 field and it indicates the chronological point at which the highest level increments or changes. Note that this information is not used by Alephino for prediction purposes; Alephino uses subfield $3 in the 863 field for this purpose.

Subfield $y

Subfield $y is used only in the 853 field and is used to qualify or modify the regularity of the publishing pattern as recorded in subfield $w (frequency).

Note that subfield $y is mandatory for frequency codes c, i, and j, or if the frequency recorded in subfield $w is a number.

Subfield $y has three elements:

1. Publication code: Use "o" (publication omitted) or "p" (published).

2. Chronology code definition:

    - Indicate a date using lowercase "d" or a particular day of the week (such as Friday) using uppercase "D"
    - "m" (month) and "s" (season).

3. Chronology code(s):

    - If you use lowercase "d" to represent date, enter the code of the month (01-12) and the number of the day in the month (01-31). For example, March 15 is recorded as 0315.
    - If you used uppercase "D" to represent the specific day of the week, use its nummer (1=Monday, 2=Tuesday, 3=Wednesday, 4=Thursday, 5=Friday, 6=Saturday, 0=Sunday).
    - To record the month, enter the code of the month: 01-12.
    - To record the season, enter one of the standard two-character codes:
        - 21 (spring, March-May)
        - 22 (summer, June-August)
        - 23 (autumn, September-November)
        - 24 (winter, December-February)

Multiple chronology codes should be separated by a comma. Combined issues are designated by a slash (/).

Examples:

`|ypm04,08,12`	Published in the months Apr., Aug. and Dec.
`|yps21,23`	Published in the seasons Spring and Autumn
`|ypd0101,0115,0201`	Published on the days Jan. 1, Jan. 15, Feb. 1
`|yom06,12`	Publication omitted in the months June and Dec.
`|yos24`	Publication omitted in the season Winter
`|yod0615,1215`	Publication omitted on the days June 15 and Dec. 15

`|yoD0,6`	Publication omitted on Saturdays and Sundays
`|ypm03,06,09/12`	Published in the months Mar., June and Sept./Dec.

Subfield $3

Subfield $3 is used only in the 863 field and indicates the publication date of the first issue of the pattern. The date should be expressed as an eight-character, numeric code, where the first four characters indicate the year, the next two characters indicate the month (01-12), and the final two characters indicate the day (01-31).

Note: the date must fall within the date range of the subscription dates from-to.

To create the following serial item records...

```
Description                  Issue Date
v.1:no.1 (2006:Winter)    01/15/2006
v.1:no.2 (2006:Spring)    04/15/2006
v.1:no.3 (2006:Summer)    07/15/2006
v.1:no4  (2006:Autumn)    10/15/2006
```

.. enter the data in the fields as follows:

```
853     $$a v. ^$$b no. ^$$u 4 $$v r $$i ((year): $$j (season)) $$w q
863     $$a 1 $$b 1 vi 2006 $$j 24 v3 20060115
```

Use the ^ character as variable for the enumeration. You decide where the issue description displays the enumeration: e.g. 1.

Note that the date entered in subfield $3 of the 853X field 20010315) generated an issue date of the fifteenth of the month for each issue.

Subfield$9

Subfield $9 is used in the 863 fields. It indicates a connection between the subscription copy and the relevant subscription record.

6 Items

Refer to the Items List section in the Items chapter of the Alephino User Guide for an explanation of Items.

Note: It is possible to initialise fields with automatical items (the items were opened from the "Open Items" function in the "Schedule Expand" node or the " Open Items" function in the "Expected Schedule" tab in the "Patterns" node). The default is in *seritemdef.cfg* in the *etc* directory on the server. Example:

```
(00001ZB)
A87 = 050
120 = BAR
*
```

Note:
- This default is available for all subscriptions with Sublibrary "ZB" and Collection "00001"
- 120 field is the barcode, BAR the system counter name for the item barcode (Web Service Module / Menu Setup Services / Counter)
- Field A87 is die Media type, 050 the Code for the Media Type "Serial".

7 Issue check-in

Serials check-in can be performed for each item (**Check-In** node) or for an items group (**Group** node). In the Group node,"By Vendors" Tab it is possible to activate a multiple inventory function. You can register the arrival of several or all items of an issue by the same vendor.

This chapter includes the following sections:

- Check-In Node
- Group Node
- Exceptions in the Check-In Process

7.1 Check-in

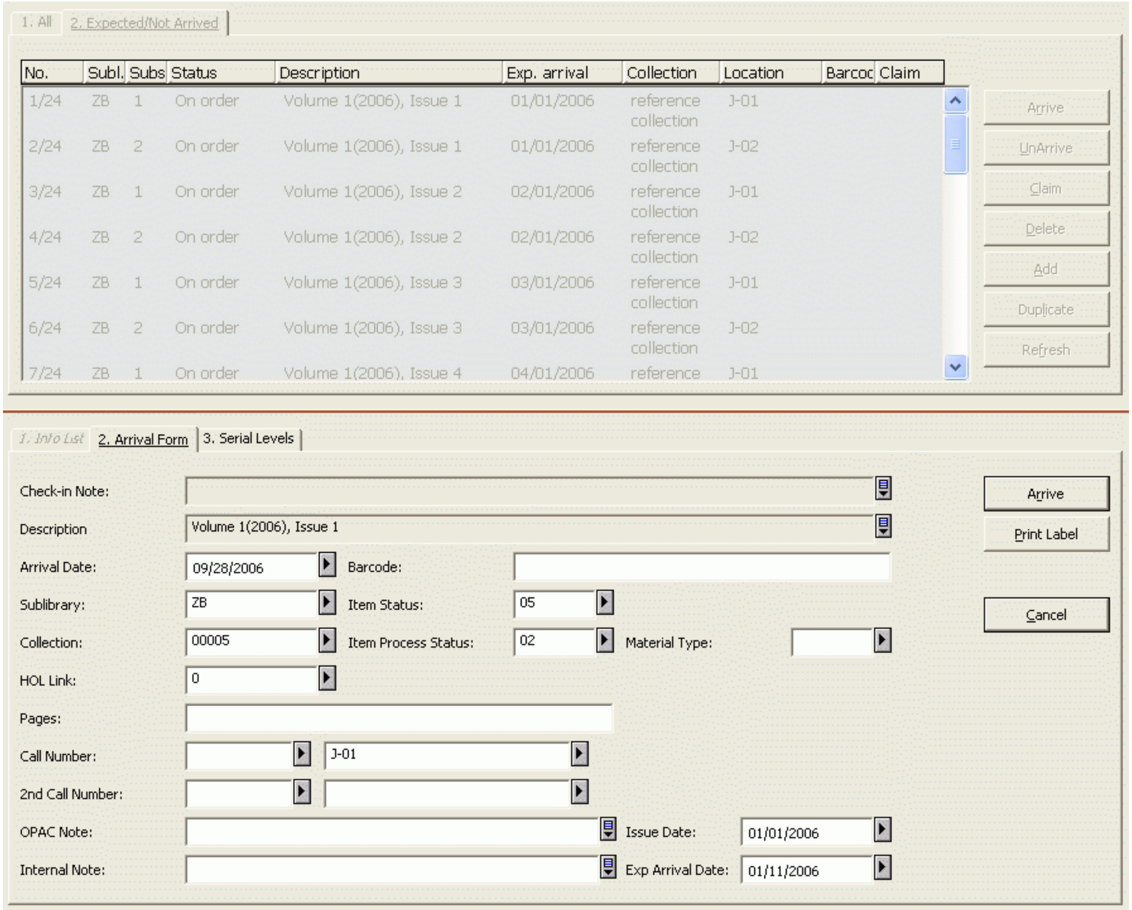
In the "Check In" node, single issues (items) are listed for check-in. The upper pane displays a list of serial item records and the lower pane displays an item record with data for update.

There are two filters available for the item list:

- By **Arrive status**: To filter by non-arrived items, choose tab2 "Expected/Not Arrived".
- By **Sublibraries**: To filter by sublibraries, click the "Control" root in the Navigation tree, mark the relevant libraries, and click Update.

To check in a **single** item, select the item line and click the *Arrive* button; to check in a **group** of items, select the relevant lines by pressing Ctrl + mouse cursor or Shift + mouse cursor and click the Arrive *button* .

The focus transfers to the lower pane, and the Arrival Form is activated.



Click *Arrive* to check in the item. You can update item data before clicking *Arrive*.

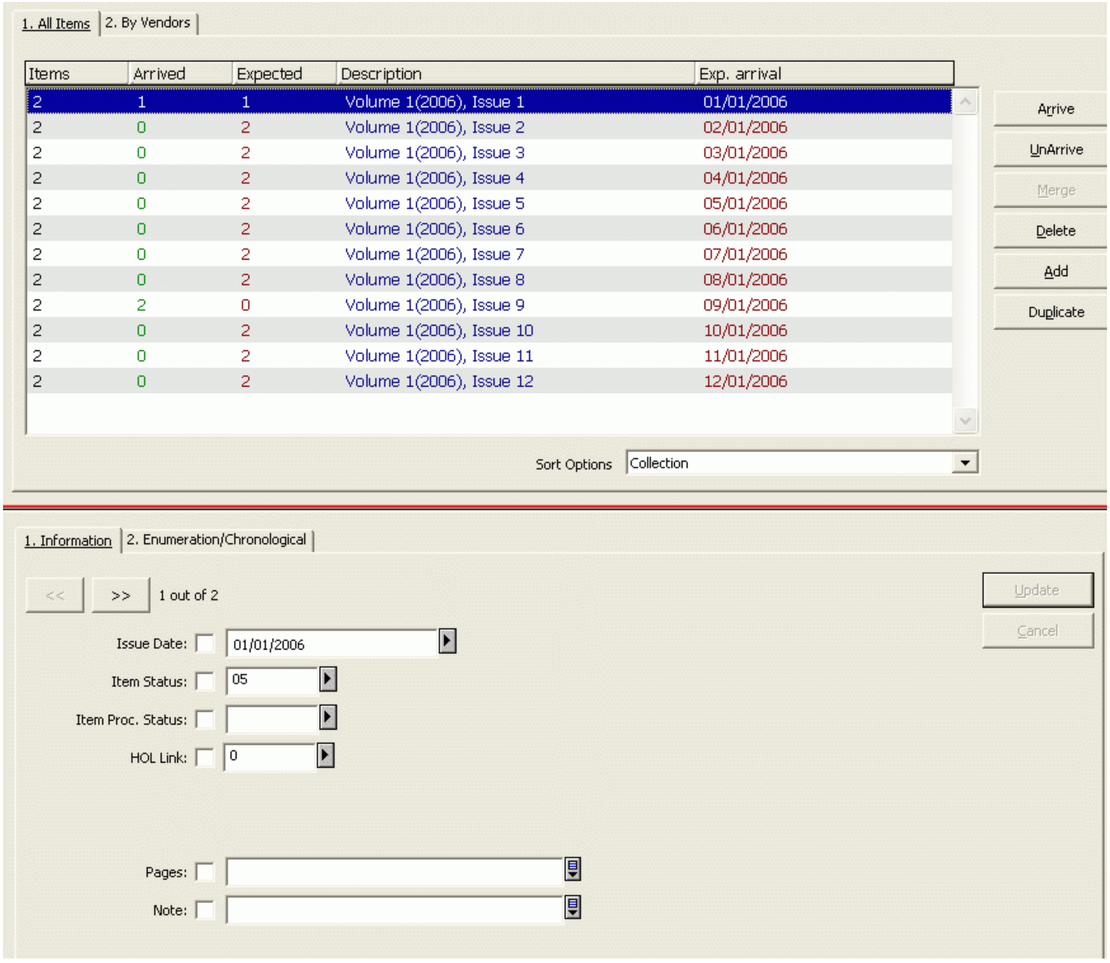
If a group of items has been selected, you can defer checking in a single item by clicking the **Skip** button, after which the next item's details will be displayed.

Clicking *Cancel* takes you out of the check-in function; all items that were checked in before **Cancel** was clicked remain checked in.

7.1.1 Group node

When the "Group" node is selected, the upper pane displays a list of groups of serial item records and the lower pane displays an item record with data for updating: Items will be regrouped by Serial Levels in the "Group" node. All items, which have the same Volumt/Part/Issue nr./Year etc., will be displayed in a list.

The upper pane displays a list of groups of serial item records and the lower pane displays an item record with data for updating:



The list displays for each group the total number of items, the number of items checked in, and the number of copies that are still expected. Use the arrow keys to move from one item to the next or to the previous item in the lower pane. When you change data here, all items will be changed. please use the "Check In" node to change only one item.

The Group node gives two groupings of items:

- Tab1 (**All Items**) displays one line for all items that share the same enumeration and chronology.

- Tab2 (**By Vendors**) displays one line for all items that share the same enumeration and chronology and vendor.

To check in an **unique** items group, highlight this group in this list and click the *Arrive* button. To check in **several** items groups, highlight the group line in the list by pressing Ctrl + left mouse button or Shift + left mouse button and click *Arrive*

The Arrival form of the first group item will be displayed.

Click *Arrive*, to check in the item. The Arrive form for the next group item will be automatically displayed. You can change the item date, before clicking *Arrive*.

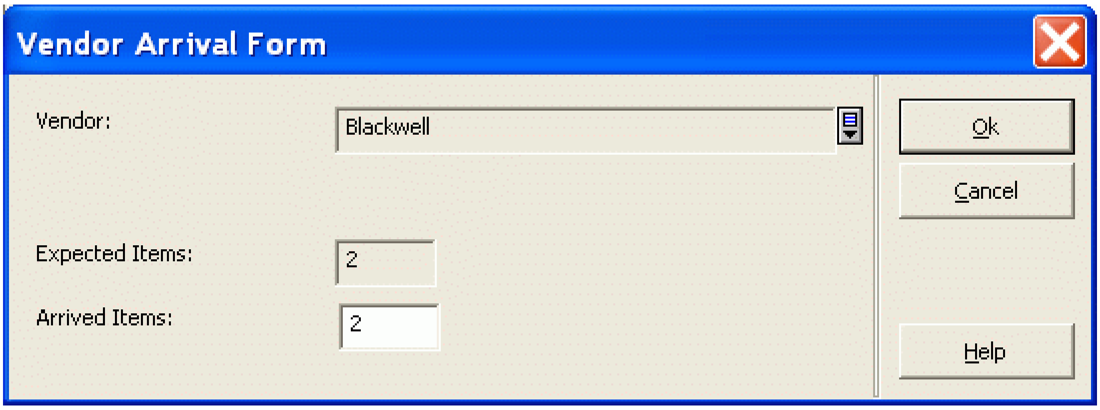
The *next* button enables you to skip the current item. The Arrive form of the following item group will be displayed.

Click the *Cancel* button to cancel the Arrive Process.

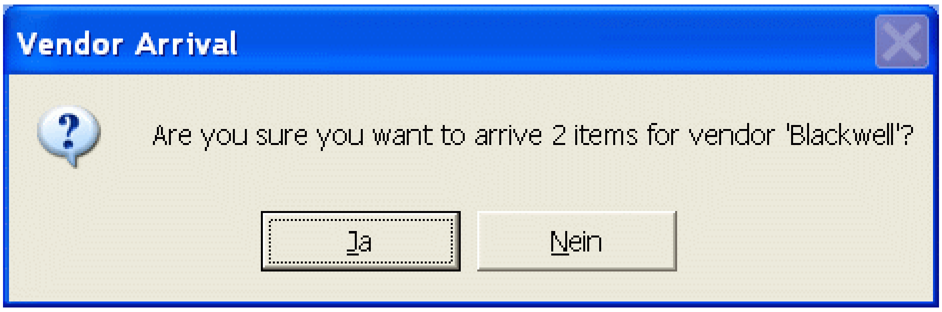
7.1.2 Multiple inventory

You can activate a multiple inventory in the "By Vendor" node The "VendorArrival" parameter have to set to Y in the *alephino.cfg* file (*etc* directory). This funtion enables you multiple or all items of a issue by the same vendor You can register the arrival of several or all items of an issue by the same vendor.

To check in a items group of a specific vendor, highlight the desired line in the list and click the *Arrive* button. The following form will be displayed:



Enter the number of items and click on *Ok*.



You will be asked to confirm.Click *Ja*.

In the case of the respective subscritptions checked routing list (Loan Serial) are settinp up, following arrangements are necessary:

1. Set up a system counter for the item barcode (Web Service Module / Menu Setup Services / Counter nummer)

2. Initialize the barcode field (*seritemdef.cfg*file,in *etc*directory):

```
3. (00001ZB)
4. A87 = 050
5. 120 = BAR                    <<
6. *
```

Example:
- This default is for all subcriptions with "ZB" sublibrary and "00001" collection
- 120 field is a barcode, BAR is the system counter name for the item barcode.

7.2 Exception in the check-in process

Exceptions can be dealt with either in the Check-In list or in one of the Group lists. The items created, updated and/or deleted will be in relation to the list. In other words, if a line in the Group list includes several copies; all copies will be included in the update.

7.2.1 Unpredicted issues

The library might receive an extra copy of an issue and want to add it to the library's collection. To do so, highlight the relevant line in the Check-In list and click "Duplicate". A new issue form will be displayed in the lower pane, with all fields duplicated.

The library might receive an unexpected extra issue (e.g., special 50th anniversary issue). To create a new issue record, click either "Add" or ("Duplicate"). A new issue form will be displayed. For example, if you register an issue which is an index, publieb between the 4. issue and the 5. issue, you can enter the issue number "4.1".

7.2.2 Merged issues

Maybe you are waiting the 3. issue or the 4. issue, but the 3. issue does not come as unique issue but rather is publied as double issue 3/4. It often happens that two issues are published together as a "merged" issue. In this case, highlight the both issues in the Group list, by pressing Ctrl + left mouse or Shift + left mouse and click the *Merge* button. The 3. issue record will be deleted but not the 4. issue record. Edit the fields in the arrive form in the lower pane and click *Change*. Then you can check in the double issue.

8 Claims

This chapter includes the following sections:

- General
- Interactive Claiming
- Batch Claiming

8.1 General

8.1.1 Basic settings

There are several factors involved in the claiming process.

- Non-arrival of an issue by its "Expected Date of Arrival".

- Claims are generated only for subscriptions with automatic "claiming" set to "Yes".

- To determine whether the Serial Claim Log letters is sent or printed, depending on the Send Type in the Vendor record If set to PRINT, the claim will be printed, whether or not the Order or the Email Claim address is entered.

8.1.2 Claiming methods

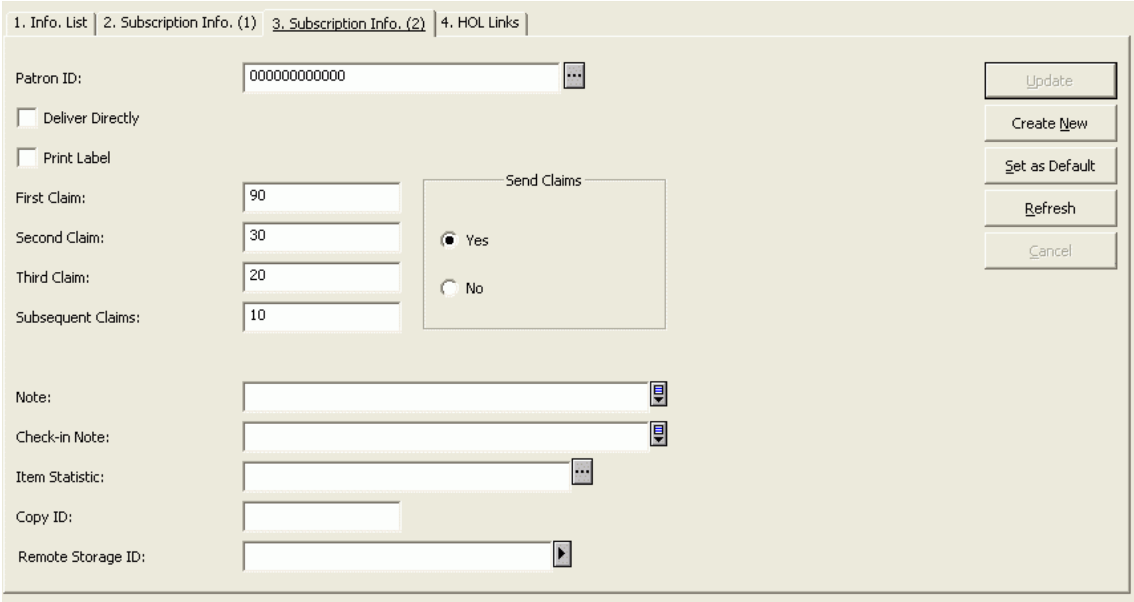
There are two ways for claiming a serial:

- From the "Automatically Claim list for Serial Item" function (Web Service Module / Menu Serial Tab). Then subscriptions will be claimed, if YES set to "Send Claims"

- Online in Acquisition/Serials, Serial Tab, click *Claim* button in Check In node.

8.1.3 Claim dates

The first claim date is the expected arrival date of the issue, which is calculated from the issue date plus the value appearing in the First Claim field of the Subscription Info.



The Arrival Date is calculated by the system using the publication date of the first issue in the cycle. The date is registered in subfield $3 of the Level-X field. If you are using the Schedule for journal prediction, this is the Issue Date field.

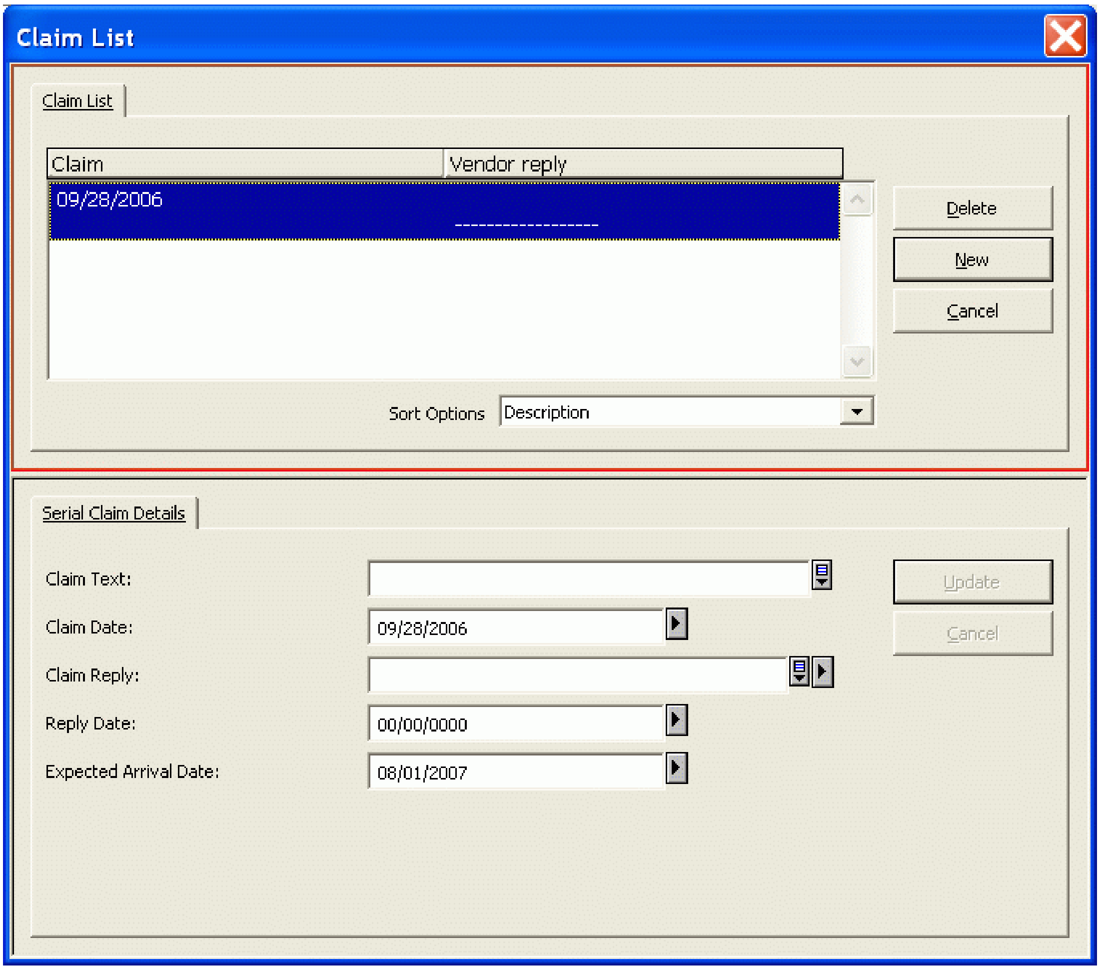
8.1.4 Claiming interval

The claiming interval is set on the second, third, and subsequent claim fields of the Subscription Info (as shown in the screen above).

The interval sets the number of days which elapse from the time of the previous claim.

8.2 Interactive claiming

When you click the **Claim** button on the "Check-In List" pane, the "Claim List" window is displayed. This window displays a list of claims that have already been sent. This enables you to send a new claim to a vendor by clicking **New**. You can update an existing claim (for example, to register the vendor's reply to a claim) by highlighting the appropriate line in the upper pane, updating details in the lower pane and then clicking **Update**.



In the form Following are the following fields and buttons available:

Fields

Claim Text

Enter text to be included in the letter to the vendor (in addition to the text that is already part of one of the standard claim letters you will choose below.)

Claim Date

The system automatically enters the current date.

Claim Reply

This field registers the vendor's reply to a claim.

Reply Date

This field registers the date of the vendor's reply to a claim.

Expected Arrival Date

This field registers the issue's Expected Arrival Date.

Claim Format

This field is displayed when creating a new claim. Choose one of the standard claim letters.

Buttons

Add
When you have finished filling in details of a new claim in the form, click *Add*.

Update
After updating an existing form, click *Update*.

8.3 Batch claiming

This service produces a report of serials orders that have not yet arrived. Claim letters for serials can then be sent manually by using the **Claim** button on the Check-In List.

This function creates for each vendor a report, listing all overdue items. From the Batch Claiming, it will be entered only subscription items, which "Send Claim YES" is marked in the record.

9 Routing lists

This chapter includes the following sections:

- Creating a Routing List
- Routing List Information
- Member Form
- Remove User
- Return Item

The routing list record contains information regarding the group leader, group members and loan procedure. If a routing list exists for a particular subscription, then when the issue item is checked in, the system displays the following message:

Afterwards the following form may be printed:

R O U T E L I S T 09/28/2006

Material routed:

Journal on interesting subjects
Year: 2006 Volume: 1 Issue: 11
Barcode: 3 6 4 3 7 Location: J-02
Description: Volume 1(2006), Issue 11

Routing group leader:
Sandra Gode
Gasstr. 18
Haus 2
22761 Hamburg

Number of days per member: 3

================= M e m b e r L i s t ==================

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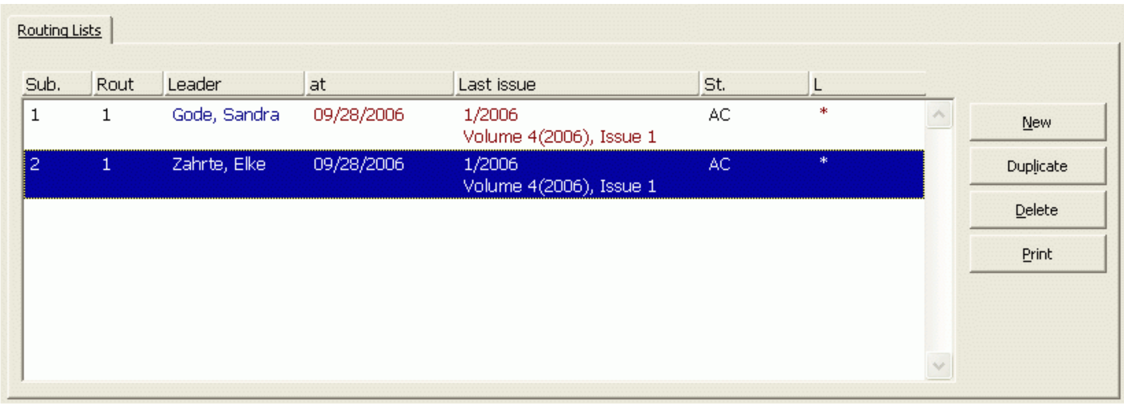
9.1 Creating a routing list

Routing lists (or multiple routing lists), can be created for some or all of the subscriptions of a title. The routing list for a title is created or opened, if it already exists, by highlighting, in the navigation tree, the "Routing List" node under the Subscription root, or by highlighting the "Routing List" root.

The Routing List is displayed in the upper pane.



This pane shows the routing lists for a particular subscription or for a serial title. For each routing group, the Last Trace shows the date when the Last Item was routed to the group.

The following buttons are available on this pane:

New

Click *New* to add a new routing list. The lower pane will be activated in order to create a new routing list.

Duplicate

Click *Duplicate* to copy the highlighted routing list. The details of the Routing Info will be copied and displayed for you to edit in the lower pane. The new group will be assigned a new sort order number. The Members are not duplicated.

Delete

Click *Delete* to delete a highlighted routing group. Note that you cannot delete a group which has an item on loan.

Print

Highlight a routing group and click *Print*, to print the list of members making up a routing group.

The following button is available when the pane is activated from the Subscription root.

Apply

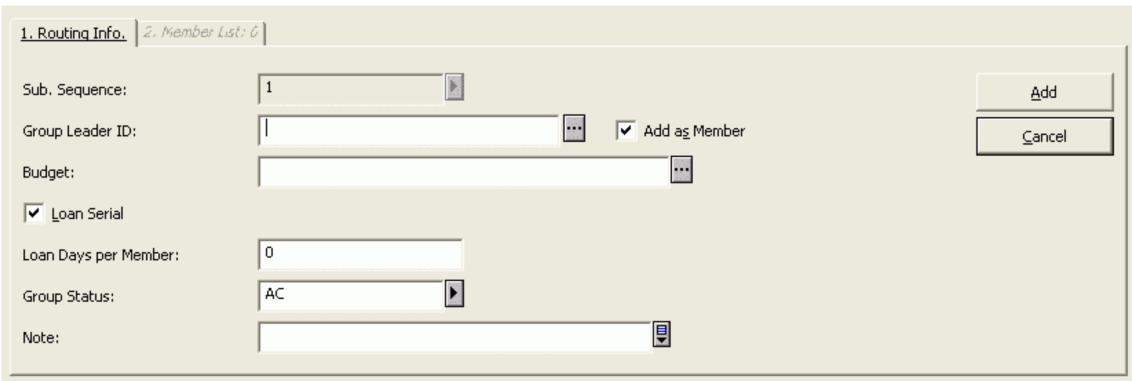
After moving a routing list up or down a level, click *Apply* to set the routing order among the groups.

Note: To move the highlighted routing list up a level in the list, click the Up arrow button. To move the routing list down a level, click the Down arrow button.

9.2 Routing list information

When you click the **New** or **Duplicate** button on the Routing Lists pane, the Routing List form is activated. This form is used to define a new routing list or to update an existing list. It has two tabs: Routing Info and Member List.

Routing Info Tab



The following section describes buttons and fields in the Routing Info tab.

Sub. sequence

This is the sequence number of the subscription to which the routing list is linked. If there is only one subscription, the system will automatically enter 1. If there is more than one, you can display a list of subscriptions by clicking the arrow to the right of the field.

Group Leader ID

Enter the ID of the group leader. This is the library patron (which can be a department) to which the routing list is assigned. The issue may be checked out to this user (see the Loan Serial field below). When clicking the List button to the right of the field, the Patron List window is displayed. The Patron List offers several options that facilitate your search for the desired Patron.

Add as Member

Insert a check mark to add the leader of the group to the list of members.

Budget

Optional. You can link the routing list to a budget. This is for information only; the budget will not actually be debited.

Loan Serial

If this option is selected, the system will loan the item to the Group Leader using the circulation loan function. This means that the loan will be displayed in the Web OPAC in the patron's list of loans. A due date will be displayed and the library can send the patron overdue notices. If this option is selected, the following field (Loan Days per Member) must be filled in, otherwise the Update button on this screen will not be activated. The due date is calculated as: number of days multiplied by the number of routing list members.

Loan Days Per Member

This is the number of days that each member on the list can keep the item. The system will multiply this value by the number of members in the list in order to calculate the due date of the item.

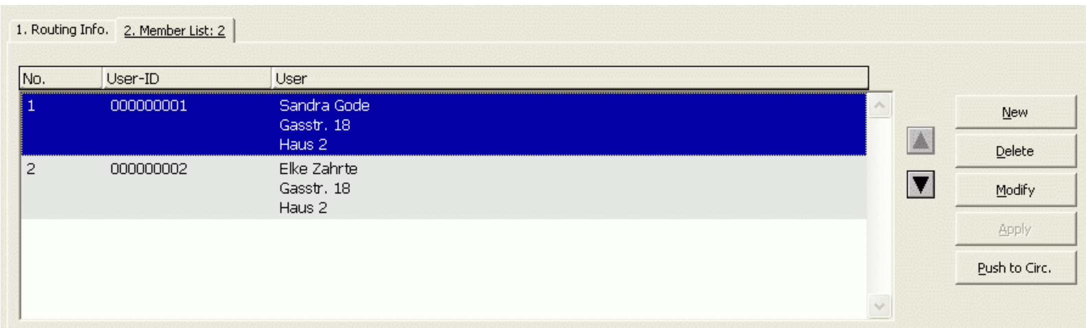
Group Status

A routing list can be active (AC) or inactive (NA).

Note

Optional. For internal data.

Member List Tab



The Member List Tab lists the members of one routing list and the position of each member in the list. Note that a user cannot be listed on more than one routing list for any one title.

The following buttons are available on this tab:

New
To add a new member to the routing list, click *New*.

Delete
To remove a member from the list, highlight the member's name and click *Delete*.

Modify
To modify a list member's record, click *Modify*.

Apply

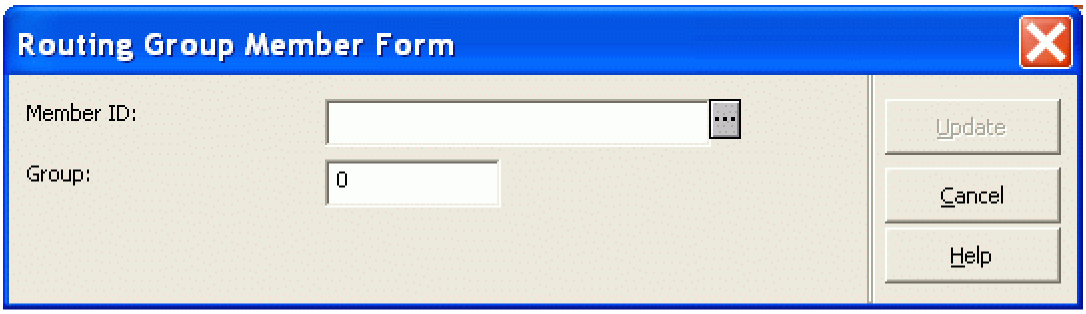
After moving a member up or down, click *Apply* to save the changes.

Push to Circ
Click *Push to Circ* to display the Patron record of the highlighted member in the list in the Circulation module.

Note: To reposition a member in the list, highlight the member, and use the up or down arrows.

9.3 Member form

When you click the *New* or *Modify* buttons on the Member List tab (Routing Information form), the following window is displayed:



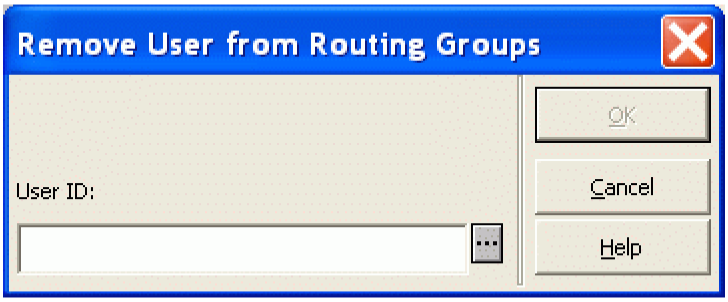
This form enables you to add a member to the selected routing list. When you are finished filling in the form, click *Update*.

Member ID
To add a member to the routing list, enter the Patron ID of the member. You can select from a list by clicking the List button to the right of the field.

Group
This field is for information purposes only and can be used to split the group.

9.4 Remove user

To select the "Remove User From Routing Groups" function, go to the "Utilities" menu and choose the function. The following form is displayed:

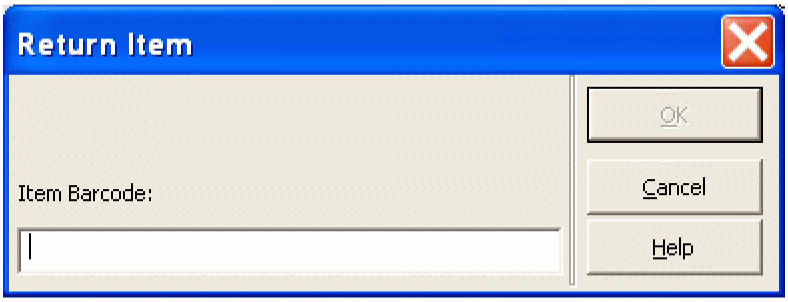


This window enables you to remove a user from every routing group of which he is currently a member.

Enter the user's ID or select from a list by clicking the List button to the right of the field. When you have selected the desired user, click **OK**. You will be asked to confirm that you do, indeed, want to remove the user from all of his routing groups.

9.5 Return item

To select the "Return Item From Routing Group" function, go to the "Utilities" menu and choose this function. The following form is displayed:



This window enables you to check in an item that was previously checked out to the Group Leader of a Routing List.

Enter the barcode of the item and click **OK**. You can repeat this action or click *Cancel* to close the window.

If other Routing Groups are waiting for the item, the item will be loaned automatically to the Group Leader of the next Routing Group in the list.