



# **How to Implement Acquisitions Exchange in ALEPH**

**All Releases**

**Last update: 27 September, 2000**

## Table of Contents

<b>OVERVIEW .....</b>	<b>3</b>
<b>BASIC: .....</b>	<b>3</b>
<b>SENDING TITLES:.....</b>	<b>3</b>
<b>RECEIVING TITLES:.....</b>	<b>3</b>
<b>CHECKS AND BALANCES: .....</b>	<b>3</b>
<b>PURCHASING TITLES FOR EXCHANGE:.....</b>	<b>4</b>

# Acquisitions Exchange in ALEPH

## Overview

- A library might need to create orders for material received on exchange. This might be necessary if the library requests material from an exchange partner and then requires better control and the ability to generate reports.
- A library might purchase materials from vendors for the purpose of sending them on exchange. When this happens, the material might be sent directly to the exchange partner by the vendor.
- A library might want to balance incoming and outgoing exchange.

Exchanges can be tracked in ALEPH using standard functionality in the Acquisitions and Serials modules. Following is a suggestion of how functionality can be applied for managing Serials exchange.

## Basic:

1. Register each exchange partner both as a USER and a VENDOR.

## Sending titles:

1. Catalog titles you wish to send on exchange separately. It is suggested that you do not use standard title tags, in order that the record not appear as part of the OPAC.
2. For each title you send on exchange, create a Subscription Record and a Routing List for each exchange partner.
3. Optionally, for additional control, create an Order Record, registering Order Type "O" and the Exchange Partner as Vendor. This indicates that the title is sent on exchange.

## Receiving titles:

1. Catalog the title.
2. Create an Acquisitions Order, designating the Exchange Partner as VENDOR, and the Order Type as "E".
3. Create Serial records, as required for Serials Control, by setting up a claiming cycle, etc.

## Checks and balances:

1. You can use the Order Index to view which titles you receive on exchange from a partner, or you can prepare a printed report.

2. You can use **b-serial-07** (User's Routing Lists) to prepare a report of which titles you send to each exchange partner.
3. You can use the Order Index (order type "O" and Vendor Code) to view the titles sent on exchange.
4. Budgets can be used to "balance" the exchange of materials between the library and its exchange partner. A budget should be opened for every exchange partner, with no initial amount specified.
5. The exchange budget should be debited when material is received in an exchange and credited when material is sent out. If orders of type "E" and/or "O" are entered, debit and credit invoices can be linked to these orders. If not, invoices can be entered as independent invoices.

### **Purchasing titles for exchange:**

Orders of type **P** will be placed against the regular library budget.

The "**target**" field in the order may be used to indicate to the vendor that the material should be sent directly to the exchange partner. If this field is used, the exchange partner must be registered as a user.