



USER DOCUMENTATION

Serials Check-in

Ex Libris

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1 Introduction

It is important to the library to be able to handle serials check-in as quickly as possible, smoothly dealing with exceptions, such as combined or never-to-be published issues. Serial check-in can be handled in one action for a group of copies (like items), or individually for each item record.

In version 16 of ALEPH 500, serials check-in is performed in the Check In or Group functions under the Control node in the Serials tab (left pane) of the Acquisitions module. A serial check-in action is performed on the ALEPH item record, and updates it. In previous versions the check-in could be performed in a number of different ways. These have been combined in the version 16 interface.

A serial can be called up quickly by one of its identifying numbers (SICI, ISSN), searched for by Acquisitions indexes (such as order number or vendor), or searched for by title or any other bibliographic information.

2 Retrieving the serial record

There are several ways of retrieving the serial record.

2.1 Search

A record can be retrieved using the browse and find functionality available in the SEARCH function. When a record is highlighted in the brief list, clicking on the “Serial” button in the lower pane brings the record into focus in the Serials function.

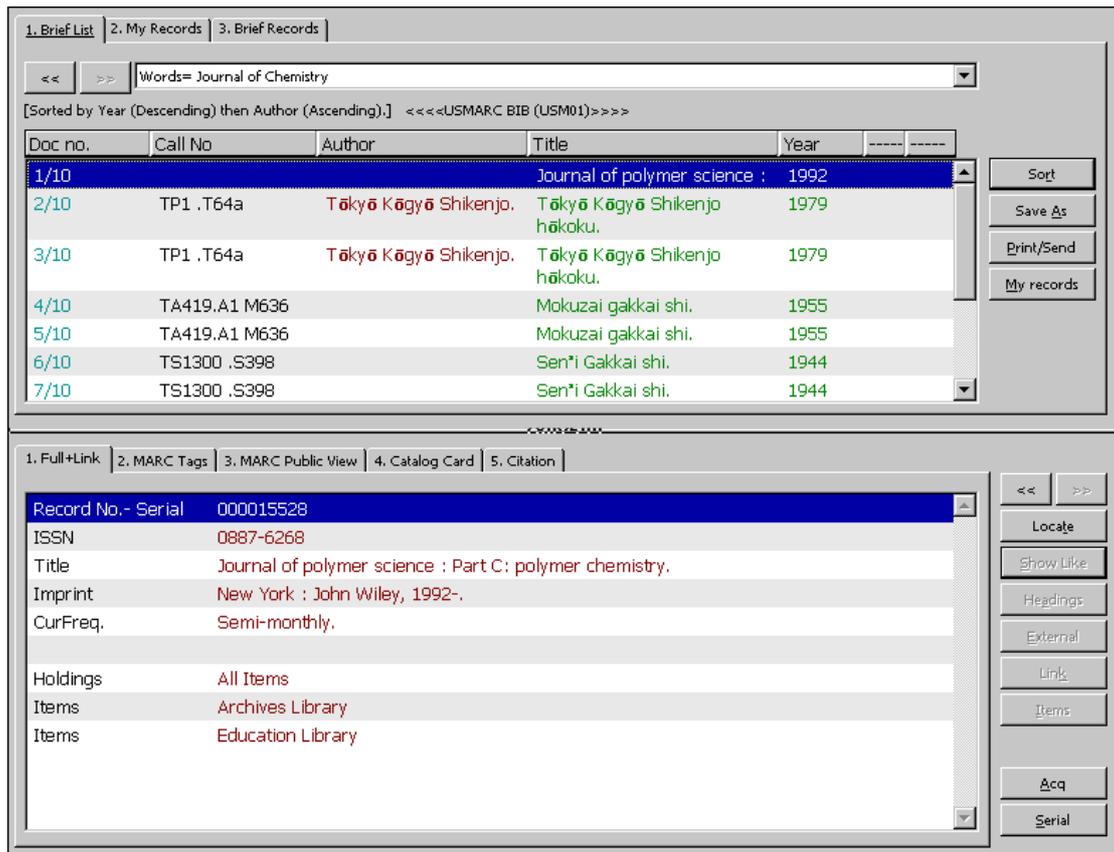


Figure 1: SEARCH with Brief + Full display + buttons

2.2 Serials bar

The top bar in the Acquisitions module is the Serials Bar. The options for search are

- Item barcode
- ISSN
- SICI (v.2)
- ADM system number

Choose the option, and enter the search text in the box to the right of the option. If the search retrieves a single record, it is displayed. If the search retrieves multiple records, a window pops up informing the user and asking if the records should be displayed in the SEARCH tab.



Figure 2: Serial Search bar with Search options

2.3 Order bar

The middle bar in the Acquisitions module is the Order Bar. The options for search are by an Order Record identifier, such as Order Number, Vendor Reference Number.

2.4 Other GUI function

When a record is displayed in one of the GUI functions, it can be “transferred” to another function. This can be done when the left pane is in Overview mode in Circulation and Acquisitions, by highlighting the relevant record in the tree, and clicking on a function button (Catalog, Items, Circulation, Acquisitions, Serials) in the right pane. In the Cataloging module this functionality requires choosing the record in the Record Manager section of the left pane, opening the Cataloging menu, and choosing “Open Acquisitions Record” or “Open Serials Record”.

3 Check-in

Serials check-in can be performed either from the Check In or the Group nodes under Control in the Serials tab in the Acquisitions GUI. In the Check In node single issues (items) are listed for check-in. In the Group node, groups of like items (that is, items that share the same enumeration and chronology) are listed for check-in.

3.1 Check In node

When the Check In node is active, the top pane displays a list of serial item records, and the bottom pane displays an item record with data for update.

There are two filters available for the item list:

- By selected sublibraries
- By all items, or only non-arrived items

To filter by sublibraries, click on the Control node in the tree, mark the relevant libraries, and click OK.

To filter by non-arrived items, choose tab2 of the list of items.

Note that items are automatically filtered by the operator’s authorization. For example, if the operator is authorized for serials check-in for a single sublibrary, only the items of that sublibrary display in the list.

To check in a single item, select the item line and click on the Arrive button; to check in a group of items, select the relevant lines and click on the Arrive button. The focus transfers to the lower pane.

1. All | 2. Expected/Not Arrived

Exp. Arrival	Barcode	Sublibrary	Description	Claim	Sbs	Vendor	Arrival	
06/01/03	B41616	UEDUC	v.1:no.1(2003:Jan.)		1	A.M.S.	08/05/03	Arrive
06/03/03	B41617	UEDUC	v.1:no.2(2003:Mar.)	05/05/03	1	A.M.S.	08/05/03	UnArrive
06/05/03	B41618	UEDUC	v.1:no.3(2003:May)		1	A.M.S.	08/05/03	Claim
06/07/03	B41619	UEDUC	v.1:no.4(2003:Jul.)		1	A.M.S.	-----	Delete
06/09/03	B41620	UEDUC	v.1:no.5(2003:Sep.)		1	A.M.S.	-----	Add
06/11/03	B41621	UEDUC	v.1:no.6(2003:Nov.)		1	A.M.S.	-----	Duplicate
								Refresh

Sort Options: Vol./Desc./Library/Collection

1. Info List | 2. Arrival Form | 3. Serial Levels

Check-in Note:

Barcode: Arrival Date:

Sublibrary: Item Status:

Collection: Item Process Status:

HOL Link: Gap Indicator:

85X Type/Link: Material Type:

Call Number: Temp Loc.:

2nd Call Number:

Pages:

OPAC Note:

Internal Note:

Arrive
Print Label
Skip
Cancel

Figure 3: Check In function, with ALL items listed

Click on the Arrive button to check in the item. You can update item data before clicking on the Arrive button. If you update enumeration/chronology fields blank out the description field so that the system will regenerate it using the updated data. If a group of items has been selected, you can defer checking in a single item by clicking on the Skip button, after which the next item's details will display. Clicking on the Cancel button exits from the check in; all items which were checked in before Cancel remain checked in.

3.2 Group node

When the Group node is active, the top pane displays a list of groups of serial item records, and the lower pane displays an item record with data for update:

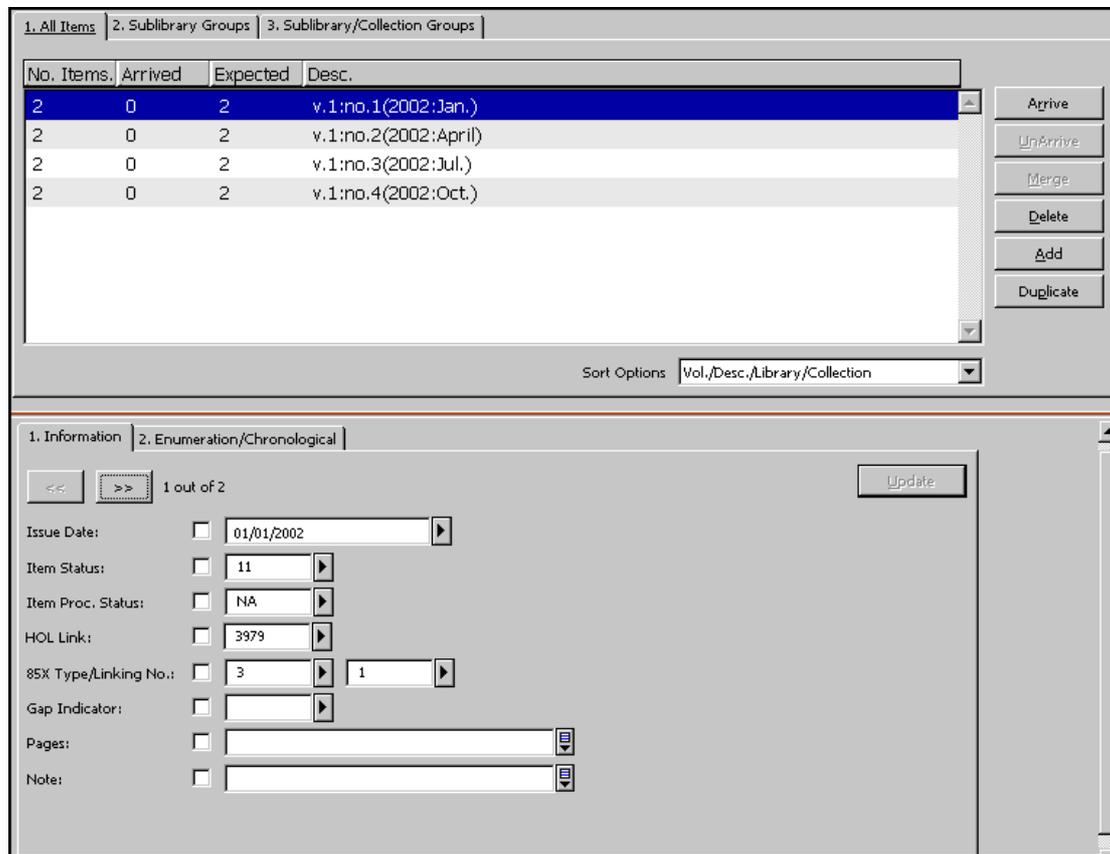


Figure 4: Group Check In window

The top pane displays a summary for each line, giving the total number of copies of an issue in the group, the number of copies checked in, and the number of copies that are still expected. The lower pane displays an item record fields for update if required. Use the arrow button to move from one copy to the next or previous.

Note that items are automatically filtered by the operator's authorization. For example, if the operator is authorized for serials check in for a single sublibrary, only the items of that sublibrary display for check-in.

The three tabs in the upper pane give different grouping of items:

- Tab1 displays one line for all items that share the same enumeration and chronology
- Tab2 displays one line for all items that share the same enumeration, chronology and sublibrary
- Tab3 displays one line for all items that share the same enumeration, chronology, sublibrary and collection

1. To check in a single group of items, select the line and click Arrive; to check in a several groups of items, select the relevant lines and click Arrive. In either case, a check-in window for a single item pops up.

2. Click Arrive to check in the item.

You can update item data before clicking on the Arrive button. If a group of items has been selected, you can defer checking in a single item by clicking on the Skip button, after which the next item's details will display. Click Cancel to quit the check in; all items which were checked in before Cancel remain checked in.

The Enumeration/Chronology tab in the lower pane displays the information relevant to the highlighted line in the upper pane. The Enumeration and Chronology fields can be updated, in which case all items in the group will be updated. Remove the data in the Description field in order that the system re-generate the field, using the new Enumeration and Chronology data.

3.3 Exceptions in the check in process

Exceptions can be dealt with either on the Check In list or 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 a Group list includes several copies, all copies will be included in the update.

3.3.1 Unpredicted issue

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 the Duplicate button. A new issue form displays in the lower pane, with all fields duplicated, including links to HOLDing and Subscription records.

The library might receive an unexpected extra issue (e.g. special 50th anniversary issue). To create a new issue record, click either the Add or Duplicate button. A new issue form displays in the lower pane. If "Duplicate" was chosen, all fields are duplicated, including links to HOLDing and Subscription records. Update the Enumeration and Chronology fields on tab3, and delete the Description field. Click Add to add the new issue. The Description field will be automatically generated, but it must have been emptied out.

3.3.2 Merged issues

It often happens that two issues are published together as a "merged" issue. Choose the relevant lines and click the Merge button. The issue record of the last line is retained, and the other lines are deleted. Correct the fields in the record displayed in the lower pane to match the issue in hand. The content of the description field should be blanked out in order that it be built accordingly to the new data.