



A Simple Serials Workflow in ALEPH v.18 - # 2

Prediction pattern creation method: Template

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

2. 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

C – Completing fields in the holdings record, including a prediction pattern

3. Under (*S*) *Subscriptions* in the left-hand pane, select (*P*) *Patterns*. Make sure that your active tab on the upper right pane is 1.Patterns. Then click on the *Add* button. If a window "Choose Pattern Document" appears, make sure to choose the line for USM60 (i.e., the holdings record you just created in step 2 above).

- In the lower pane, click on the *Template* button – choose *Pattern Template File* and then click *OK*; check your fields and make any necessary changes
 - Again, click on the *Add* button
- You will have created the 853 field.

4. In the upper pane, make sure you click on 2.Level X tab – click on the *Add* button.

5. In the bottom pane, click on the *Template* button – choose *Pattern Template File* and then click *OK*; check your fields and then click on the *Add* button. You will have created the 853X field.

D – Previewing the prediction, and opening items accordingly

6. Select the 5.Expected Schedule tab and look at your prediction. If it looks good, click on the *Open Items* button. If it doesn't, repeat steps 3-5 to correct your 853/853X fields.

E – Arriving issues

7. In the left-hand pane, select (*K*) *Check In* and click on the *Arrive* button (this will allow you to check in issue per issue).

8. In the lower pane, check your 2.Arrival Form tab and make sure you enter the Material Type as *ISSUE*, and then click on *Arrive*. You will get a log window which you can then close.



9. 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 looks like to the end user

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