

ADVANCE

Serials Management Guide

(Release 6.82)

September 2000

NOTE: To navigate in this manual, you can click on:

- *table of contents headings*
- *index entry page numbers*
 - *blue cross-references*
- *Acrobat bookmark list headings, at the left.*

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Software Described ADVANCE Library System
Release 6.82 (September 2000)

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1

Introduction

Purpose

The *Serials Management Guide* describes how to customize and set up the Serials Control system using a group of Serials Control tables. Its purpose is also to teach you how to use the Calendar Processor to run Serials Processing jobs.

Contents

Chapter 2 of this guide provides a brief overview of the Serials Control Module, including a Serials Terminology list and a Menu/Function Map.

Chapter 3 presents a general description of the set up table menus and table access. Also described in this chapter are the contents of the code table entries and options used to maintain the entries.

Chapter 4 describes the Codes tables accessible through the Code Table Menu.

Chapter 5 describes the Control Codes tables accessible through the Control Table Menu.

Chapter 6 is a presentation of the Calendar Processor's setup and associated production jobs.

Chapter 7 describes how to set up Claims for Serials.

Appendix A, *Using ADVANCE*, provides general instructions on accessing screens and editing fields in the system.

Appendix B is a general ADVANCE glossary.

Appendix C lists the user permissions.

Other Documentation

Consult other guides for related information:

- The *Serials User's Guide* has been written for the system manager and the Serials staff. It allows them to perform serials tasks by presenting the basic operational and detailed procedures of the Serials Control Module.
- The *Acquisitions Management Guide* describes how to set up and customize the Acquisitions Module, how to use the background processing jobs, reports, loaders, and so on.
- The *Acquisitions User's Guide* describes the process of ordering items, invoicing and producing purchase orders, inquiry and update procedures for the fund file, and so on.
- The *Utilities Management Guide* describes general ADVANCE setup and management: port definitions, access control, the background processing calendar, and so on.
- The *Reports Guide* describes how to print reports.

Typographical Conventions

Two special text styles are used in this guide:

1. The screen identifiers, the text that you can enter, and screen messages are in a monospace font style. Examples: "DAMG", "Y", "REG", "Item on temporary hold by staff".
2. The names of screen fields and options, and cross-references to section or manual titles, are in italics. Examples: "*UNIT COST*", "*Exit*", "see *Using tables*".

Generic Examples

Because system behaviour can be tailored by your library's system managers to meet local needs, the screens and options shown in this document may not exactly match the ones at your library.

2

Overview

The purpose of the *ADVANCE Serials Management Guide* is to provide information about setting up the Serials Control system (or module). This system is part of the ADVANCE Library System. This Guide will help you implement your library's policies and procedures as Serials Control system parameters.

Serials Control setup **must** be completed before any Serials Control operations can take place.

With Serials Control, your library can:

- receive serial items,
- create and maintain copy and issue descriptions,
- control serials item routing, track serials claims,
- maintain serials holdings information,
- predict next expected issues,
- and file serials vendor information.

This chapter introduces the process of setting up the Serials Control system (or module). The different functions of the Serials Control Main Menu are discussed first, followed by a description of the three steps necessary to perform the set up:

- System Setup
- Basic Serials Setup
- Special Serials Setup

A serials terminology list and a menu map end this chapter.

Serials Control Overview

The primary functions of Serials Control are represented by the menu options on the SERIALS CONTROL MAIN MENU:

Checkin

This function enables you to receive serials items that have been entered into the system database through Cataloguing or Acquisitions. Checkin is the primary function of Serials Control, where you can access information about claims, holds, and order details for a serials item. The Checkin screen presents serials information in graphical format that enables you to see the next few expected issues, as well as some of the previously received issues.

Routing

This function enables you to create and maintain routing slips, patron recipient lists and routing title lists. Serials Control can use this routing information to print routing slips for serials items automatically. There is also a facility to format the routing slips from the Serials Control system. The formatting of routing slip is discussed in more detail at the end of the *Control Setup Tables* chapter.

Claims

This function enables you to review and update lists of claims that have been automatically or manually created through Serials Control when a serials item has not been delivered by a vendor. There is also a facility to print claim forms from the Serials Control system.

Vendor Maintenance

This function enables you to access the vendor records controlled by the Acquisitions module. These records can be updated or you can create new vendor records.

The other two functions on the SERIALS CONTROL MAIN MENU, namely **Code Table Menu** and **Control Table Menu**, are the main subjects of this manual.

Serials Setup

To perform the above functions, the Serials Control system must be set up. The system is defined using parameters that implement your library's serials control policies and procedures. Parameters are the rules or guidelines that make the Serials Control system function in a way that fits your library's needs and requirements.

You are able to create and update parameters for publication pattern, chronology, claims, vendors, currency, payment type, etc., by using a set of Serials Control tables. These tables are grouped under the two menu option headings Code Table Menu and Control Table Menu. Listing and describing these tables is the primary purpose of this *Serials Management Guide*. The setup process takes place in the following areas:

System Setup

This is where you specify access control, menu configuration, screen identifiers, command vocabularies, and help messages.

Basic Serials Setup

This is where you specify ship-to codes, currency codes, payment type codes, etc.

Special Serials Setup

This is where you specify reports and report group codes, vendor codes, etc.

System Setup

System setup defines the global settings for your entire ADVANCE system, including the Online Catalogue, Circulation, Cataloguing, Acquisitions, and Serials Control Modules. System setup must be completed before an individual module can be set up. Major system-level concerns are access control, command vocabularies, menu configuration, help message definition and the background processors.

Access Control and Security

The ADVANCE Library System is designed for use in a multi-user, time-sharing environment where data security, privacy, and access control are critical. The Serials Control system is a sub-system or module of the ADVANCE Library System. Because Serials Control is part of the ADVANCE Library System it uses a system-wide, multi-level security control system to protect the computer system and data from unauthorized access. There is also a validity-checking system to help ensure that all item information is accurate and properly added to the database.

Each authorized user of ADVANCE is assigned an individual Identification Code and Password. Only users entering a valid ID code and password can access ADVANCE. The combination of code and password also determines a user's access level within ADVANCE. Because each system screen with an identifier has a minimum access level requirement, a user's access level determines what functions he or she may perform. The serials supervisor, for example, may have an access level high enough to allow him or her to perform every function in the system. On the other hand, a particular serials clerk might have access only to those screens needed for the type of job he or she normally performs.

Menu Configuration

The ADVANCE Serials Control Module is menu-driven. Commands are grouped according to function on a series of menus. These menus are linked together by pathways that form a tree structure. Each time you use a menu to perform a function, the commands follow a path that leads from the bottom of the tree up and out along branches of the tree and back down again. The default menu tree is based upon standard Serials Control practices and, in most cases, can be used without any modification.

In some situations, however, you may want to change the default menu system, to be consistent with the existing organizational structure of your library or to reduce the number of hierarchical levels in the system. The ADVANCE setup routines provide your system manager with the capability to customize menus. Your system manager may define new menu headings, the number of menu command options, the menu screen layout, and the tree structure of the menu system.

Screen Identifiers

To meet the speed requirements of the expert user, the ADVANCE system has the option of operating as a **command-driven system**, using the screen identifiers. A screen identifier is an acronym of a screen title. For example, the Code Table Menu has the acronym `CODM` as a screen identifier.

On all ADVANCE menus, the screen identifiers (technically, a menu command verb) lie between the menu entry number and the description of the entry. When you enter a screen identifier at a prompt, the system responds by taking you directly to the screen attached to that identifier, bypassing the normal sequence of menus.

This command-driven system option is particularly useful when you reach a high degree of familiarity with the ADVANCE system, and may want to get away from the rigidity of the menu structure. The use of screen identifiers instead of menus can speed-up Serials Control functions, but does require the memorization of identifiers.

Command Customization

ADVANCE allows you to define your own commands. These customized vocabularies can be screen identifiers that refer to menus, system commands, or even locally-created programs. For security, each command has an access level attached to it. Only authorized staff are able to define command vocabularies.

Help Message Customization

ADVANCE can display help messages for most data fields and command prompts. Prompts on many Serials Control Module data entry screens also contain information on what should be entered. You can ask for online assistance simply by entering a single question mark (?) at any field or prompt.

A list of specific examples or code options are displayed when a pair of question marks (??) is entered. Help messages may include explanations of prompts, examples of input, or a complete listing of all possible options. If necessary, help messages may take several screens. Authorized staff can create, modify, or delete messages to suit particular system configurations and library practices.

Throughout the system you will find a **? help** option available. When a help message has not been defined, the following message will appear:

```
Online help not available, please refer to documentation.  
Press <ENTER>.
```

When this message appears, consult this manual and the other documents provided with the ADVANCE system.

Background Processor

The ADVANCE Serials Control Module has a background processor, sometimes called the phantom processor, to enable routine functions to be performed automatically. You have the option of using this processor or switching it off. When the processor has been activated by your system manager, you will be able to have the production of such jobs as claims printing done at optimum times.

If you want to do such jobs manually at some point, use the screen identifier *SCP* to access the SERIALS CONTROL CALENDAR PROCESSOR menu. This menu gives you the option to look at the available production codes and to schedule production jobs to run at a convenient time.

The background processor checks for the next production date on the control code record, for information about when to run Serials Control jobs. To set the dates and time when the background processor will run your jobs, see *Calendar Processor* on page 6-1.

Basic Serials Setup

This guide describes Serials Control basic setup for: codes, number formats, defaults, and schedules. All this setup information is entered and updated in a set of tables accessible through either of two menus: the Code Table Menu and the Control Table Menu.

Codes

The Serials Control Module provides a variety of codes which you can assign to functions, such as: frequency, checkin type, vendor status, or claim cycles. These codes can control system processing, screen presentation, report organization, and so on.

Some codes are simple. For example, the `VENDOR USAGE CODES` table only requires you to supply a phrase describing each code, and the system does not use the codes in any special way. The library could define the code `SER` for vendors from whom only serials should be ordered, and `ALL` for vendors from whom all forms of material may be ordered. The information can help you in selecting a vendor, and can perhaps be useful in organizing some reports.

Other codes are more complex, requiring extra fields for defining them. When these codes have been defined and filed, they interact with the system. The interaction influences the appearance and function of other screens; for example, the Publication Regularity Code. When one of the Regularity Codes is entered at the *Regularity Pattern* field on the `PUBLICATIONS PATTERN CODE` screen, this Regularity Code will influence the prediction of subscription delivery patterns.

Defaults

Several of the tables include user-defined default values. For example, the `FISCAL PROFILE` table defines a default message code. The system will use this default value when claims are automatically generated.

Special Setup

In addition to the parameters set up through the Code Tables Menu and Control Tables Menu, there are some parameters that the library can set up through other menus. The library can also define Report Group Codes, and use the Report Writer to design local reports. This part of the system is accessible through the Serials Reports Menu. (See the *Reports Guide*).

ADVANCE is an integrated library system, and the Serials Control Module makes use of some of the parameters defined under other modules such as Cataloguing and Acquisitions.

Serial Invoice Loader

The library can load serial invoices from all vendors who can produce invoices in the Geac ADVANCE invoice format, including EBSCO Industries. The library can also load serial invoices from The Faxon Company, Inc. and Faxon Canada, Ltd.

For details, see the *Acquisitions Management Guide*.

Serials Terminology

This section defines some of the serials terms used in the guide. Additional ADVANCE terms are described in the *Glossary* at the back of the guide.

General serials control standards that you might find useful include the *USMARC Format for Holdings and Locations* and the *American National Standard for Information Sciences — Serial Holdings* (ANSI Z39.44-1986).

The primary terms, with brief descriptions, are as follows:

serial

a publication in any medium issued in successive parts bearing numerical or chronological designations and intended to be continued indefinitely. This definition includes periodicals, newspapers, annuals, society proceedings, and numbered monographic series. (This definition is adapted from the *ALA Glossary*).

In practice, a serial is any bibliographic item with an appropriate Material Code, such as `as`. This code allows access to the item in the Serials Control system. The Serial Control system enables you to define a publication pattern and copy sets for the item.

copy set

a run of issues of the serial, simply a “subscription”. The library may have several copy sets of a serial, and each copy set might be held at a different institution and sublocation.

issue

a publication unit of the serial, usually identified by unique enumeration and chronology. Types of issues include regular issues, supplements, and indexes. On the Checkin Screen, each issue is displayed in a separate box.

copy

a physical instance of an issue. A collection made up of one copy of each issue is called a copy set.

piece

a barcoded circulation unit. A serial piece may consist of one copy of an issue, or a short run of copies (of consecutive issues) bound together. Typically, each serial piece is assigned to a copy set of the serial.

copy holdings statement

a brief description of a checked in copy of an issue — its copy number, institution, status, and issue enumeration and chronology. The list of copy holdings statements is sometimes referred to as the “checkin history”.

summary holdings statement

a description of a range of checked in issues for a copy set — an enumeration and chronology range, or perhaps a missing issue. The system generates a separate summary statement for each publication pattern defined for the serial.

publication pattern

a definition of the enumeration levels, chronology levels, and frequency pattern for the serial. This information enables the system to predict issues. A serial can have up to three active patterns: one for regular issues, one for supplements, and one for indexes. The serial may also have older, inactive patterns of each type.

enumeration

issue numbering, such as volume and part

chronology

issue cover date, such as month and year. This is not necessarily when the library expects receipt of the issue.

Serials Control Main Menu

```
DD MMM YYYY          Geac ADVANCE Library System (##)          DEFAULT AU
HH:MM                Your Library Name

SERIALS CONTROL MAIN MENU

1. CHKM  Checkin Menu                6. CTLM  Control Table Menu
2. RTEM  Routing Menu                 7. SRM   Serials Report Menu
3. CLMM  Claims Menu                  8. CEHI  Edit Holdings (PIECES)
4. VENM  Vendor Maintenance Menu      9. MM    Return to Master Menu
5. CODM  Code Table Menu

Enter the number of your selection and press <ENTER>
or ? followed by <ENTER> for Help :
```

The SERIALS CONTROL MAIN MENU provides access to all Serials Control functions.

Menu and Function Map

The following is a list of menus and functions you may encounter in using the Serials Control Module. The user-availability, location, and titles of these items might have been modified by the library.

Items in *italics* are covered by the *Serials Management Guide*. Items in **bold** are menus.

MM **ADVANCE Master Menu**

SER **Serials Control Main Menu**

CHKM **Checkin Menu**

RTEM **Routing Menu**

RADD Add/Update Standard Routing IDs

RREC Routing Recipient Display

RFMT *Routing List Format*

CLMM **Claims Menu**

CLMR *Claims Review*

CLMP *Claims Printing*

VENM **Vendor Maintenance Menu**

CODM **Code Table Menu**

PUBP *Publication Pattern Type*

FREQ *Frequency Codes*

FREQT *Frequency Type*

CHRN *Chronology Codes*

CHKT *Checkin Type*

PHYS *Physical Format*

CLMSG *Claim Message Codes*

CLMCD *Claim Cycle Codes*

LIBCD *Library Codes*

CNTCD *Country Codes*

VENST *Vendor Status Codes*

VENTP *Vendor Type Codes*

VENUS *Vendor Usage Codes*

ICURR *ISO Currency Codes*

CURRC *Currency Codes*

PAYTP *Payment Type Codes*

ORDMTH *Order Method Codes*

SHPTO *Shipto Codes*

NUMB *Numbering Codes*
PREG *Publication Regularity*
PREGL *Publication Reg. Labels*

CTLM *Control Table Menu*

CSNO *Copy Set Format*
CLNO *Claim Number Format*
SCP *Calendar Processor Codes*
FISCL *Fiscal Profile*
SMAT *Valid Material Codes*
SLBL *Serial Label Display*
CUDEF *User Defaults*

SRM *Serials Report Menu*

CCR *System Reports*
RW *Report Writer*
ARGC *Report Group Codes*
RPC *Report Prompt Codes*

CEHI *Edit Holdings (PIECES)*

3

Using the Tables

The ADVANCE Serials Control Module has setup tables that allow libraries to tailor the module to meet their individual needs and preferences.

This chapter gives a general description of how to access and update the Serials Control setup tables.

Chapters 4, 5 and 6 describe the tables in detail.

Accessing the Tables

The Serials Control setup tables can be accessed directly by entering their **screen identifiers**, or indirectly by going through a series of two or three menus.

To help you with the access process, this guide provides you with two aids: a screen identifiers index and a menu map of all the menus and the pattern of their layout within the Serials Control system (see [Overview](#) on page 2-1).

Your user ID will choose one of the two access methods, depending on the settings of your individual access control levels and port setup.

The general access menus for Serials Control are:

- ADVANCE MASTER MENU (which might not appear at your terminal)
- SERIALS CONTROL MAIN MENU
- SERIALS CONTROL CODE TABLE MENU
- SERIALS CONTROL CONTROL MENU.

There are two Serials Control **setup table** menus:

- the Code Table Menu provides access to the tables.

- the Control Table Menu, which provides access to the remaining functions required for Serials Control setup.

Code Table Menu

Enter 5 on the SERIALS CONTROL MAIN MENU, or CODM, to display the SERIALS CONTROL CODE TABLE MENU.

```
DD MMM YYYY          Geac ADVANCE Library System (#.##)          P P P P P P  I I I I I I I I
HH:MM                Your Library Name
```

SERIALS CONTROL CODE TABLE MENU (CODM)

1. PUBP	Publication Pattern Type	12. VENTP	Vendor Type Codes
2. FREQ	Frequency Codes	13. VENUS	Vendor Usage Codes
3. FREQT	Frequency Type	14. ICURR	ISO Currency Codes
4. CHRN	Chronology Codes	15. CURRC	Currency Codes
5. CHKT	Checkin Type	16. PAYTP	Payment Type Codes
6. PHYS	Physical Format	17. ORDMTH	Order Method Codes
7. CLMSG	Claim Message Codes	18. SHPTO	Shipto Codes
8. CLMCD	Claim Cycle Codes	19. NUMB	Numbering Codes
9. LIBCD	Library Codes	20. PREG	Publication Regularity
10. CNTCD	Country Codes	21. PREGL	Publication Reg. Labels
11. VENST	Vendor Status Codes		

Enter the number of your selection and press <ENTER>
or ? followed by <ENTER> for Help.
Press <ENTER> to return to previous level :

To access a particular table from the above menu, enter the table's option number or screen identifier. For example, to access the CLAIM MESSAGE CODES table, enter 7 on this screen prompt or enter the screen identifier, CLMSG, anywhere within Serials Control.

Control Table Menu

Enter 6 on the SERIALS CONTROL CODE TABLE MENU, or CTLM, to display the SERIALS CONTROL CONTROL MENU.

```
DD MMM YYYY      Geac - Library Division - ADVANCE (#.##)      P P P P P I I I I I I
HH:MM            Your Library Name

SERIALS CONTROL CONTROL MENU (CTLM)

1. CSNO  Copy Set Format                5. SMAT  Valid Material codes
2. CLNO  Claim Number Format            6. SLBL  Serial Label Display
3. SCP   Calendar processor codes      7. CUDEF User Defaults
4. FISCL Fiscal Profile

Enter the number of your selection and press <ENTER>
or ? followed by <ENTER> for Help.
Press <ENTER> to return to previous level :
```

To access a particular table from the above menu, enter the table's option number or screen identifier. For example, to access the Claim Number Format table, enter 2 on this screen or enter the screen identifier, CLNO, anywhere within Serials Control.

Table Screen

Most of the Serials Control setup tables have two levels: an initial screen listing the codes, and a detail screen showing the values associated with a code. The initial screen of a setup table typically provides a numbered list of valid codes and an option line that indicates the possible actions you can take. As an example, consider the CHRONOLOGY CODE table.

Initial screen

```
                                CHRONOLOGY CODE - (CHRN)

Number of records : 12
Code   Description of code
-----
1. D   Date type
2. DAILY Day of the week
3. DD  Day of Month
4. M   Months type
5. M-L Monthly - long names
6. NP  No predictions
7. Q   Quarterly
8. S   Seasons type
9. SPLMN SPLIT MONTH
10. SPLYR SPLIT YEAR
11. Y   Year
12. quart Quarterly

Options:
? help  Add item  # line  Print  Forward  Backward  Search jump
Exit
```

Initial Screen Column Description

<i>Number of records</i>	The total number of codes defined for this table.
<i>Code</i>	The codes and their reference numbers. For example, the code for item 3 on the CHRONOLOGY CODE screen is DD for Day of the Month type. The system lists up to 14 codes per screen, and maintains the full list in an alphabetical sequence.
<i>Description of code</i>	Brief free text description of each code. Also on the screen, on the last line, are displayed a number of options. The Initial Screen Options list describes these options.

Initial Screen Options

Option selection	<p>There are two ways to select an option:</p> <ul style="list-style-type: none">• type the option's initial letter (or character) and <ENTER> to go directly to the option, or• press the space bar to move from one option to the next until you reach the option. <p>Once the option you want is highlighted, <ENTER> to activate it.</p>
? help	<p>Provides library-specified help on the setup table. To select this option, type ? and <ENTER>, or press the space bar until you reach the option and <ENTER>.</p>
Add item	<p>Adds a new code to the table and accesses its detail screen (see Editing a Code on page 3-13). To select this option, type A and <ENTER>, or press the space bar until you reach the option and <ENTER>. Then type a code (such as ABC) and <ENTER>. NOTE: The library cannot add codes in some of the setup tables. In these cases, the system does not offer the <i>Add item</i> option.</p>
# line	<p>Accesses the detail screen for the code you specify. On that screen you can examine and edit the associated values (see Editing a Code on page 3-13). To select this option, type the screen number of the code you require and <ENTER>, or press the space bar until you reach the option and <ENTER>.</p>
Print	<p>Prints the complete code list for the table. To select this option, type P and <ENTER>, or press the space bar until you reach the option and <ENTER>.</p>
Forward, Backward	<p>These options display other screens of a long code list. To select these options, type F or B and <ENTER>, or press the space bar until you reach the option and <ENTER>.</p>
Search jump	<p>Allows you to jump forward or backward in a long code list, skipping the screens in between. The option is case sensitive: for example, enter R rather than r to jump to the R's.</p>

Exit

Exits from the setup table and returns you to the menu. For example, exiting from the CHRONOLOGY CODE table takes you to the SERIALS CONTROL CODE TABLE MENU. To select this option, type E and <ENTER>, or press the space bar until you reach the option and <ENTER>.

Detail Screen

The detail screen of a setup table displays the values associated with a code, and provides an option line that indicates the possible editing actions you can take.

As an example, consider the detail screen for the Chronology Code. This sample screen was accessed by selecting the *# line* option and specifying 1 on the table's initial screen.

Detail screen

```

                                CHRONOLOGY CODE - (CHRN)

      : DD
-----
1. Description      : Day of Month
2. Type            : 4
   0 - Date                4 - Day of month
   1 - Months              5 - Day of week
   2 - Seasons             6 - No predictions
   3 - Year (YYYY)        7 - Split year (previous/current)
                           8 - Split year (current/next)

3. Date format      :
4. Valid Predictions :
5. Split year format :
   0 - YYYY/YYYY, 1 - YYYY/YY, 2 - YY/YY
6. Split year separator:

Options:
? help  # line  Line by line  Copy  Print  Delete  Exit

```

The detail screen shows field numbers, field descriptions, and field values for a code. The code is displayed at the top of the detail screen, between the screen heading and the first field (code DD for this detail screen). This screen is different for each setup table. For example, the CHRONOLOGY CODE table detail screen has four fields:

- *Description*
Enter a brief free-text description of a code.
- *Type*
Choose the type of chronology from the attached list.

- *Date format*

Specify which date format you use from the list of valid entries.

- *Valid Predictions*

Specify the prediction pattern.

For more information on these fields see [Chronology Codes \(CHRN\)](#) on page 4-11.

Detail Screen Options

Option selection	<p>There are two ways to select an option:</p> <ul style="list-style-type: none">• type the option's initial letter (or character) and <ENTER> to go directly to the option, or• press the space bar to move from one option to the next until you reach the option. <p>Once the option you want is highlighted, <ENTER> to activate it.</p>
? help	<p>This option provides library-specified help text about the detailed screen of a setup table. To select this option, type ? and <ENTER>, or press the space bar until you reach the option and <ENTER>.</p>
# line	<p>Accesses the field that you specify. In the field selected, you can change the current value (see Editing a Code on page 3-13). To select this option, type the screen number of the field for which you require access and <ENTER>, or press the space bar until you reach the option and type a field number (such as 2 for <i>Type</i>) and <ENTER>.</p>
Line by Line	<p>This option, only available on a few screens, accesses all the fields for you to edit starting with the first field and working through all the fields in sequence (see Editing a Code on page 3-13). To select this option, type L and <ENTER>, or press the space bar until you reach the option and <ENTER>.</p>
Copy	<p>Copies the values from another code to this code, and accesses all the fields for you to accept or edit (see Editing a Code on page 3-13). To select this option, type C and <ENTER>, or press the space bar until you reach the option and <ENTER>. Then type another code (such as M) and <ENTER>.</p>
Print	<p>Prints the detail screen for the code on display. To select this option, type P and <ENTER>, or press the space bar until you reach the option and <ENTER>.</p>
Delete	<p>This option, not available on all screens, deletes the code on display (see Editing a Code on page 3-13). To select this option, type D and <ENTER>, or press the space bar until you reach the option. Then answer</p>

Y or N to the system prompt and <ENTER>. **CAUTION:** Do not delete any codes that are in use on your system.

Exit

Returns you to the table's initial screen (or the table's menu), **without** saving the code and values on display. To select this option, type E and <ENTER>, or press the space bar until you reach the option and <ENTER>.

File

Saves the code and values as they are currently displayed, and returns you to the table's initial screen. If the table does not have an initial screen, this option returns you to the table's menu instead. To select this option, type F and <ENTER>, or press the space bar until you reach the option and <ENTER>. The file option appears on the screen only after you change (or attempt to change) the contents of one of the fields.

Editing a Code

This section describes how to add, modify, copy, and delete the codes in a setup table. The information is general and covers tables from both the Code Table Menu and the Control Table Menu.

Simultaneous Users

More than one user can access the same setup code at the same time. Because most libraries permit only one person to change codes, this situation would likely be rare; perhaps during the time when the system is first set up and several staff members are working on the tables. Simultaneous use may produce some confusion, but keeping in mind the following two basic rules followed by the system can help. In general, the system will:

- save information rather than discard it
- save the latest information.

For example, if one user enters the *File* option to leave the detailed screen, and the other uses *Exit*, the system saves the code as it was filed, no matter which person left the code last. On the other hand, if both users use the *File* option to leave, the system saves the code as it was filed by the last person to leave.

Cross Validation of Codes

Some fields use a code value from another setup table. For example, the CHRONOLOGY CODE detail screen has a field for specifying a default Type Code. When you edit this field and specify a code, the system will only accept valid codes. However, if another user accesses a field and deletes an earlier specified code, the system does not automatically delete the earlier specified code from places in the system where the code has been used. This will make the earlier specified code invalid and can cause difficulties in the system. This means that caution should be used when you delete a code. Check all the other setup tables in which the code might have been assigned, and specify replacement codes wherever necessary.

Field Entry Commands

The commands you can use to edit text or display help within a detail screen field are described in *Appendix A, Using ADVANCE*.

Add a Code

To add a new code to a table, highlight the *Add item* option on the table's initial screen, by typing A and <ENTER> or by using the arrow keys. Then select the option with <ENTER>. The system responds by displaying a prompt below the *Option* line:

```
Enter the code you wish to add : _
```

Specify the new code and <ENTER>. If you do not want to enter a new code, you can leave the prompt's field empty and <ENTER>.

When you add a new code, the system displays the detailed screen and places the cursor at the beginning of the first field for input. For example, if you add a new Chronology Code called ABC, the system displays the screen with the cursor at the beginning of the *Description* field.

```

                                CHRONOLOGY CODE - (CHRN)

: ABC                                *** New Record ***
-----
1. Description      : New Code
2. Type            :
   0 - Date                4 - Day of month
   1 - Months             5 - Day of week
   2 - Seasons            6 - No predictions
   3 - Year (YYYY)       7 - Split year (previous/current)
                        8 - Split year (current/next)

3. Date format      :
4. Valid Predictions :
5. Split year format :
   0 - YYYY/YYYY, 1 - YYYY/YY, 2 - YY/YY
6. Split year separator:

```

Enter a value for the field and <ENTER>. The system responds by moving the cursor to the next field. Do this until you have gone through all the fields and the system displays the *Option* line. You can also leave all the fields empty and go directly to the option line with <ENTER> as many times as is required to move the cursor down through the fields. After the last field, the cursor will jump to the first options line.

Once the *Option* line is displayed, you can go back and edit a field, print the code, and so on (see [Detail Screen Options](#) on page 3-11).

Use the *File* option to save the new code, or the *Exit* option to discard the new code.

The *Add item* option is not available in some setup tables.

Modify a Code

To modify a code, access the code's detail screen. To do this, first highlight the *# line* option at the table's initial screen, by typing # and <ENTER>, or by using the arrow keys. Then select a code by typing the code's reference number and <ENTER>. The system responds by displaying the detail screen for that code. This step is not necessary for tables which lack an initial screen and show a detail screen immediately.

On the detail screen, use the *# line* option to select one field to change, or the *Line by line* option to be prompted through all the fields. Type over existing text as necessary, and use the field edit commands.

The field edit commands work slightly differently for the *# line* option than for the *Line by line* option.

Use the *File* option to save the code with its changed values, or the *Exit* option to discard the changes.

Copy a Code

To copy the values from one code to another, first access the detail screen of the code you want to add or change. To do this, use the *# line* or *Add item* option on the table's initial screen to select or add a code, respectively. The system responds by displaying the detail screen for that code.

On this screen, highlight the *Copy* option by typing C and <ENTER>, or by using the arrow keys. With <ENTER> the system responds by displaying a prompt below the *Option* line:

```
Enter codes to copy from: _
```

To copy the field values from another code, type the name of that code and <ENTER>.

Alternatively, if you change your mind and do **not** want to copy a code, <ENTER> with the prompt's field left empty. The cursor will return to the *Option* line.

If you are not sure of the code, you can enter ?? to display the code list from the initial screen. Selecting a code causes the system to replace all the current values with new values and returns the cursor to the *Option* line. There is an exception: if the code on display is one you are **Adding**, the system instead places the cursor at the beginning of the first field and then makes you go through each field, as it did when you first accessed the detail screen.

Use the *File* option to save the code with its displayed values, or the *Exit* option to discard the changes.

Delete a Code

To delete a code, first access the detail screen. Then use the *# line* option on the table's initial screen to select a code. The system responds by displaying the detailed screen for that code.

On the detail screen, highlight the *Delete* option by typing **D** and **<ENTER>**, or by using the arrow keys. With **<ENTER>** the system responds by displaying a prompt below the *Option* line:

```
Are you sure that you want to delete this code?
```

To **continue** the process of code deletion, type **Y** and **<ENTER>**. The system removes the code and returns you to the table's initial screen.

To **stop** the process of code deletion, type **N** and **<ENTER>**. The system returns the cursor to the *Option* line.

The *Delete* option is not available in some setup tables.

CAUTION Do not delete any codes that are in use in the database. The system cannot automatically remove codes from existing publication patterns, copy sets, vendors, and so on. If you do delete a code, check whether it is used as a default in other setup tables and, if so, remove it from there as well.

4

Code Setup Tables

This chapter describes the Serials Control code setup tables. The code tables are discussed in the order that they occur on the Code Table Menu.

Some of the code tables are common to both the Serials Control and the Acquisitions Modules. Special care must be taken when modifying these common code tables because changes will affect both modules.

For a general description of the setup table menus and instructions on adding and updating the codes in the tables, see *Using the Tables* on page 3-1.

List of Code Tables

Below is a list of the Serials Control codes tables. Code tables that are also used within the Acquisitions Module are labelled with the term **Also Acquisitions**.

For the Code Table Menu (SERIALS CONTROL CODE TABLE MENU), the code tables are:

1. PUBP — Publication Pattern Type
2. FREQ — Frequency Codes
3. FREQT — Frequency Type
4. CHRN — Chronology Codes
5. CHKT — Checkin Type
6. PHYS — Physical Format
7. CLMSG — Claim Message Codes — (Also Acquisitions)
8. CLMCD — Claim Cycle Codes — (Also Acquisitions)
9. LIBCD — Library Codes — (Also Acquisitions)

10. CNTCD — Country Codes — (Also Acquisitions)
11. VENST — Vendor Status Codes — (Also Acquisitions)
12. VENTP — Vendor Type Codes — (Also Acquisitions)
13. VENUS — Vendor Usage Codes — (Also Acquisitions)
14. ICURR — ISO Currency Codes — (Also Acquisitions)
15. CURRC — Currency Codes — (Also Acquisitions)
16. PAYTP — Payment Type Codes — (Also Acquisitions)
17. ORDMTH — Order Method Codes — (Also Acquisitions)
18. SHPTO — Ship To Codes — (Also Acquisitions)
19. NUMB — Numbering Codes
20. PREG — Publication Regularity
21. PREGL — Publication Regularity Labels

Code Tables Descriptions

This section contains descriptions of each code table available in the SERIALS CONTROL CODE TABLE MENU (CODM).

The descriptions of these codes are similar to those in the *Acquisitions Management Guide*. They are reproduced in this *Serials Management Guide* because your library would not have an *Acquisitions Management Guide* if the Acquisitions Module is not installed on your system.

CAUTION Do not delete codes that are currently “in use” in the database. The system cannot automatically remove codes from existing copy sets, vendors, publication patterns, etc. If you want to delete a code, remove the code from the areas where the code is used before you delete the code from the setup table. Also, before deleting a code, check if the code is used as a default in other setup tables. Remove the code from these areas too.

Publication Pattern Type Code (PUBP)

Enter PUBP or the corresponding menu number to access the PUBLICATION PATTERN CODE table from:

- the Holding Setup Menu (CHSM) in Cataloguing
- the Serial Control Code Table (CODM) in Serials Control

This table enables your library to designate a code representing one of the three types of publication patterns available in Serials Control.

- Basic Bibliographic unit

This is the basic serials publication pattern. It is composed of the units that reflect the most regular receiving pattern for the serials item. It can be a printed paper publication, computer tape, audio tape, video tape or any item that is prepaid and is subsequently produced on a regular chronological basis. For example, the bibliographic unit of a subscription to *National Geographic* is the printed magazine that arrives every month.

- Index

This is an extra to the bibliographic unit. This serials item will index the information in a single bibliographic unit or multiple bibliographic units. For example, a subscription to *National Geographic* can have a yearly index that covers the 12 issues received over the past year.

- Supplement

This is also an extra to the bibliographic unit. It is any serials item received that is not a bibliographic unit or an index. For example, a subscription to *National Geographic* regularly provides maps with its magazines. These maps can be classified as supplements.

Initial screen

```

                                PUBLICATION PATTERN CODE - (PUBP)

Number of records : 3
Code               Description of code
-----
1. 0               ISS
2. 1               IND
3. 2               SUP

Options:
? help  # line  Print  Forward  Backward  Search jump  Exit
    
```

Detail Screen

```

                                PUBLICATION PATTERN CODE - (PUBP)

: 0
-----
1. Description                : ISS
2. Type                       : 0
   0 - Bibliographic unit
   1 - Index
   2 - Supplement

Options:
? help  # line  Line by line  Copy  Print  Exit
    
```

Fields

Publication Pattern Code [0, 1, 2]

1. *Description* [1-3 character]

Brief description of the Publication Pattern Code.

2. *Type* [1 digit]

Enter one of the numeric codes shown on the screen. These codes correspond to the three types of serials: Basic Bibliographic unit, Index, and Supplement.

Where Used

You can assign Publication Pattern Codes on the Type of Holding Detail screen:

- in the *Publication Type* field.

Frequency Codes (FREQ)

Enter FREQ or the corresponding menu number to access the FREQUENCY CODE table.

Initial screen

```

                                FREQUENCY CODE - (FREQ)

Number of records : 19
Code  Description of code
-----
1. a   Annual
2. b   Bimonthly
3. c   Semiweekly
4. d   Daily
5. e   Biweekly (every 2 weeks)
6. f   Semiannual
7. g   Biennial (every 2 years)
8. h   Triennial (every 3 years)
9. i   Three times a week
10. j  Three times a month
11. m  Monthly
12. q  Quarterly
13. s  Semimonthly
14. t  Three times a year

Options:
? help  Add item  # line  Print  Forward  Backward  Search jump
Exit
```

Detail Screen

```
                                FREQUENCY CODE - (FREQ)

                                : m
                                -----
1. Description      : Monthly
2. Type            : 10
   0 - a - Annual          9 - j - Three times a month
   1 - b - Bimonthly      10 - m - Monthly
   2 - c - Semiweekly     11 - q - Quarterly
   3 - d - Daily          12 - s - Semimonthly
   4 - e - Biweekly (every 2 weeks) 13 - t - Three times a year
   5 - f - Semiannual     14 - w - Weekly
   6 - g - Biennial (every 2 years) 15 - x - Completely irregular
   7 - h - Triennial (every 3 years) 16 - v - Quadrennial (every 4 years)
   8 - i - Three times a week 17 - y - Quinquennial (every 5 years)
                                18 - z - Decennial (every 10 years)

Options:
? help  # line  Line by line  Copy  Print  Delete  Exit
```

Fields

Frequency Code [1-2 character code]

1. *Description* [Text]

Brief description of the Frequency Code.

2. *Type* [0 to 18]

Enter a number. These numbered codes correspond to the available publication frequencies.

Where Used

You can assign a Frequency Code on the:

- PUBLICATION PATTERN DETAIL screen — (in the *FREQUENCY CODE* field).

Frequency Type (FREQT)

Enter FREQT or the corresponding menu number to access the FREQUENCY TYPE table.

This table allows your library to assign a code that will enable the report generator to extract and summarize frequency information. The three codes available correspond to the Publication Regularity Codes, but are internal codes that are automatically assigned to a serial record to enhance system performance.

Initial screen

This screen shows the three codes with sample descriptions.

```

                                FREQUENCY TYPE - (FREQT)

Number of records : 3
Code  Description of code
-----
1. 1   Monthly
2. 2   Daily/Weekly
3. 3   Erratic

Options:
? Help  # line  Print  Forward  Backward  Search jump  Exit
```

Detail Screen

The code 1 is shown in the detailed screen.

```
                                FREQUENCY TYPE - (FREQT)

                                : 1
                                -----
1. Description                   : Monthly

Options:
? Help  # line  Line by line  Copy  Print  Delete  Exit  File
```

Fields

Frequency Type Code [1, 2, 3]

1. Description [Text]

Brief description of the Frequency Type code.

Where Used

The system uses the assigned Frequency Type Code on the Serials Control report:

- Frequency Type Summary Report.

Chronology Codes (CHRN)

These codes help the system calculate the chronological pattern attached to a serial item.

Access

Enter CHRN or the corresponding menu number to access the CHRONOLOGY CODE table from the:

- Holdings Setup Menu (CHSM)
- Serials Control Code Table (CODM).

Initial screen

```
                                CHRONOLOGY CODE - (CHRN)

Number of records : 12
Code  Description of code
-----
1. D   Date type
2. DAILY Day of the week
3. DD  Day of Month
4. M   Months type
5. M-L Monthly - long names
6. NP  No predictions
7. Q   Quarterly
8. S   Seasons type
9. SPLMN SPLIT MONTH
10. SPLYR SPLIT YEAR
11. Y   Year
12. quart Quarterly

Options:
? help  Add item  # line  Print  Forward  Backward  Search jump
Exit
```

Detail Screen

```
                                CHRONOLOGY CODE - (CHRN)

                                : M
                                -----
1. Description                   : Months type
2. Type                          : 1
   0 - Date                      4 - Day of month
   1 - Months                    5 - Day of week
   2 - Seasons                   6 - No predictions
   3 - Year (YYYY)              7 - Split year (previous/current)
                                8 - Split year (current/next)

3. Date format                   :
4. Valid Predictions            : JAN,FEB,MAR,APR,MAY,JUN,JUL,AUG,SEP,OCT,NOV,DEC
5. Split year format           :
   0 - YYYY/YYYY, 1 - YYYY/YY, 2 - YY/YY
6. Split year separator:

Options:
? help  # line  Line by line  Copy  Print  Delete  Exit
```

Fields

Chronology Code [1-5 character code]

1. Description [Text]

Brief description of the Chronology Code.

2. Type [0-8 as defined below]

Choose one of the following prediction pattern types:

0 If *Date* type is chosen, enter a valid date format at field 3. Otherwise, field 3 can be left blank.

1 If *Months* type is chosen, define the chronology constants (e.g., JAN, FEB, etc.) to be used for predictions, starting at January and using 12 units (each unit represents a month of the year). These chronology constants are entered in field 4, *Valid Predictions*. At checkin, the system assigns a chronology constant to the issue's chronology. The value assigned is based on the month of publication and its associated

valid prediction. Using the M Chronology Code shown above, an issue published in the fifth month of the year is assigned a value of 'MAY'.

- 2 If `Seasons` type is chosen, define the chronology constants (e.g., WINTER, SPRING, etc.) to be used for predictions, starting at the season represented by January and using 12 units. These chronology constants are entered in field 4, *Valid Predictions*.
- 3 If `Year` type is chosen, the system assigns a four digit year to the issue's chronology. The year is determined from the date of the publication.
- 4 If `Day of month` type is chosen, the system assigns a number between 1 and 31 to the issue chronology. This number is determined from the date of publication.
- 5 If `Day of week` type is chosen, define 7 chronology constants (e.g., SUN, MON, etc.) starting at the constant representing Sunday. These chronology constants are entered in field 4, *Valid Predictions*.
- 6 If `No predictions` type is chosen, the system will not make predictions for the next expected serial item.
- 7 If `Split year (previous/current)` is chosen, define the format (field 5) and the separator (field 6) that is used to build the chronology. At checkin, the system assigns a chronology constant to the issue's chronology. The value assigned includes the year prior to the issue's year of publication as well as the year of publication. The actual format of the chronology is based on the format and separator assigned in fields 5 and 6. For example, to assign a chronology of 89/90 to an item that is published in January 1990, set field 2 to 7, field 5 to 2 and field 6 to "/".
- 8 If `Split year (current/next)` is chosen, define the format (field 5) and separator (field 6) that is used to build the chronology. At checkin, the system assigns a chronology constant to the issue's chronology. The value assigned includes the issue's year of publication as well as the year immediately following the publication date. The actual format of the chronology is based on the format and separator assigned in fields 5 and 6. For example, to assign a chronology of 90/91 to an item that is published in January 1990, set field 2 to 8, field 5 to 2, and field 6 to "/".

3. *Date format*

[1-3 character]

If you entered a zero (0) in field 2, choose one of the valid entries displayed at the bottom of the screen. This field imposes a specific pattern for date entry. If this field is blank, any date format can be used. The *Date format* field can have the following values:

D0

dd MMM — e.g. “22 APR”

D

dd MMM yyyy — e.g. “22 APR 1992”

D0/

dd/mm (or mm-dd) — e.g. “22/04” (or “04/22”)

D/

dd/mm/yyyy (or mm/dd/yyyy) — e.g. “22/04/1992” (or “04/22/1992”)

D2/

dd/mm/yy (or mm/dd/yy) — e.g. “22/04/92” (or “04/22/92”).

System setup determines whether the month comes before or after the day in the D0-, D-, and D2- formats.

4. *Valid Predictions*

[Text]

Enter text descriptions of the chronology pattern. This text will appear on the checkin screen. There are 2 pattern types used in the valid predictions field: months and days of the week.

The 12 slot pattern corresponds to *months*, where the first slot = month 01 or January.

The 7 slot pattern is for the *days of the week*, where the first slot corresponds to Sunday (slot 1) and the seventh slot corresponds to Saturday (slot 7).

For example, if a season description is required, the description should be entered as follows, using the 12 month pattern.

```
Winter, Winter, Winter, Spring, Spring, Spring, Summer, Summer, Summer, Fall, Fall, Fall
```

Commas will not appear on the checkin screen.

5. *Split year format*

[0, 1, or 2]

This field is only used when field 2 is set to 7 or 8.

- 0 Date format for the year expressed in the format YYYY/YYYY (4 digits, separator, 4 digits), for example, 1989/1990
- 1 Date format for the year expressed in the format YYYY/YY (4 digits, separator, 2 digits), for example, 1989/90.
- 2 Date format for the year expressed in the format YY/YY (2 digits, separator, 2 digits), for example, 89/90.

6. *Split year separator* [1 character]

This field is only used when field 2 is set to 7 or 8. Enter the character that will separate date formats for split years, for example, 89/90.

Where Used

You can assign Chronology Codes on the:

- PUBLICATION PATTERN DETAIL screen — (in the *CHRONOLOGY CODE* field).

Checkin Type (CHKT)

The Checkin Type allows you to assign a status to a serial item when it is checked in. For example, if a serial item has not been delivered in the expected time, your library can make a claim to the vendor. This status can be indicated on the Checkin screens with the Claimed Checkin Type code.

There are 21 Checkin Type codes; six are definable by the library. The user definable codes are numbered 15 through 20 and referred to as Optional 1 through Optional 6. Use these codes to define statuses such as *Not published*, *In process*, and so forth.

Access

Enter CHKT or the corresponding menu number to access the CHECKIN TYPE CODE table:

- Holdings Setup Menu (CHSM)
- Serials Control Code Table (CODM).

Initial screen (1 of 2)

CHECKIN TYPE CODE - (CHKT)	
Number of records : 20	
Code	Description of code

1. 1	Received
2. 2	Returned
3. 3	Claimed
4. 4	Exp issue
5. 5	Exp index
6. 6	Exp suppl
7. 7	Missing
8. 8	In Bindery
9. 9	Bound
10. 10	No Action
11. 11	Item due
12. 12	Withdrawn
13. 13	Microfilm
14. 14	Microfiche
Options:	
? help	# line Print Forward Backward Search jump Exit

Screen 2 of 2

```

                                CHECKIN TYPE CODE - (CHKT)

Number of records : 20
Code  Description of code
-----
15. 15  Optional 1
16. 16  Optional 2
17. 17  Optional 3
18. 18  Optional 4
19. 19  Optional 5
20. 20  Optional 6

Options:
? Help  # line  Print  Forward  Backward  Search jump  Exit
    
```

Detail Screen

```

                                CHECKIN TYPE CODE - (CHKT)

: 3
-----
1. Description                               : Claimed
2. Suppress display in OPAC (1=YES)?         :
3. Treat items as 'Received' in Serials (1=YES) :
   (Item does not need to be checked in)
4. Treat items as Gaps in Holdings displays (1=YES)? : 0
5. Treat items as Held in Holdings Display (1=YES)? : 1

Options:
? help  # line  Line by line  Copy  Print  Exit
    
```

Fields

Checkin Type Code [1, 2, 3, ... 14]

1. Description [Text]

Brief description of the Checkin Type Code.

2. *Suppress display in OPAC* [0 or 1]
- Determines whether items with this Checkin Type Code are displayed in the Online Catalogue. This field does not effect the display of the summary holdings statement to the OPAC user, nor the display of parts information in other modules of the system.
- 0 Checkin history is displayed in the Online Catalogue.
- 1 Checkin history is not displayed in the Online Catalogue (This feature might be used for the *withdrawn* status or for *next expected* status if the library does not want this information available to their OPAC users.)
- You must logoff ADVANCE after changing field 2 so that the new value can be reflected in the OPAC display.
3. *Treat items as 'Received' on Checkin screen* [0 or 1]
- Determines whether items with this Checkin Type code will be regarded as *Received* when the Checkin Screen is displayed. Allows you to specify that items with status of *Received*, *In bindery*, *Bound*, and so forth, have really been received by the library. The message *Received xx/yy* on the Serial checkin screens will reflect this.
- 0 Item has not been received. Displays as not received on the Checkin Screen. (The actual status may be *Item due*, *Claimed*, *Returned*, or *Missing*.)
- 1 Consider this item as received by library and display as received on the Checkin Screen. (Allows you to assign an implied status of received though the actual status is *Bound*.)
4. *Treat items as Gaps in Holdings displays* [0 or 1]
- Determines whether or not items with this Checkin Type Code will be treated as non-gap or gap breaks in holdings statements. Corresponds to the USMARC Holdings fields 863/4/5 \$w.
- This parameter has an effect only if *Treat items as Held in Holdings Display (I=YES)?* is set to 0 (parameter 5).
- 0 If 0 is specified and the item is not treated as **held** by the library, the exported MARC record containing the location's holdings will be built showing a nongap break (tag 863/4 subfield w is assigned a value *n* for a

nongap indicator). For example, a checkin type representing unpublished parts. Holdings statements will be built with a ; (semicolon – a nongap break) to indicate that this item is not held by the library.

- 1 If 1 is specified and the item is not treated as held by the library, the exported MARC record containing the location's holdings will be built showing a gap break (tag 863/864 subfield w is assigned a value *g* for a gap indicator). For example, a Checkin Type representing withdrawn parts. Holdings statements will be built with a , (comma – a gap break) to indicate that this item is not held by the library.

5. *Treat items as Held in Holdings Display*

[0 or 1]

If 0 is specified, the exported MARC record containing the location's holdings will be built showing either a nongap or gap break (tag 863/4 subfield w is assigned a value of *n* or *g* respectively). As well, summary holdings statements will display a nongap break using a “;” (semicolon) and a gap break using a “,” (comma). For example:

v.1:no1(1976:Jan.)-v.1:no.4(1976:Apr.),v.1:no.6(1976:June),v.1:no.8(1976:Aug.)-v.1:no.10(1976:Oct.)

The library holds neither v.1:no.5(1976:May) nor v.1:no.7(1976:July).

Where Used

You can assign a Checkin Type Code on the Serials Control screen:

- CHECKIN FOR (SHIPTO CODE) screen—(in the *STATUS* field).

Physical Format (PHYS)

The Physical Format Code is used in the Location Copy record to identify the type of the material (physical characteristics) of the item. This code provides a means of differentiating multiple formats. For example, you might have multiple subscriptions to *National Geographic*, all in different physical forms, such as, paper, microfiche, and electronic.

Physical format is defined in the USMARC 007 field, positions 1 and 2.

Access

Select Physical Format Code (PHYS) from the Holding Setup Menu.

```

                                PHYSICAL FORMAT CODE - (PHYS)

Number of records : 77
Code   Description of code
-----
1. ad   Atlas
2. ag   Diagram
3. aj   Map
4. ak   Profile
5. aq   Model
6. ar   Remote-sensing image
7. as   Section
8. ay   View
9. az   Other
10. ca  Tape cartridge
11. cb  Chip cartridge
12. cc  Computer optical disc cartridge
13. cf  Tape cassette
14. ch  Tape reel

Options:
? help  Add item  # line  Print  Forward  Backward  Search jump
Exit

```

Use the *Add item* option to create a new code or use the *# line* option to edit an existing code. The detail screen appears.


```
                PHYSICAL FORMAT CODE - (PHYS)

      : he
-----
1. Description          : Microfiche

Options:
? help  # line  Line by line  Copy  Print  Delete  Exit
```

1. Description

[46+ characters]

Enter a description of the code. (Only the code is displayed on the Location Copy Detail screen.)

Where Used

You can assign a Physical Format Code on the:

- LOCATION COPY DETAIL screen – (in the *Physical Format* field).
- LOCATION COPY MARC EDIT MARC DISPLAY screen – (in the 007 field).

Claim Message Codes (CLMSG)

Enter CLMSG or the corresponding menu number to access the CLAIM MESSAGE CODES table.

You can assign a Claim Message Code to a serial item. The code enables a stored message to be printed on the claim letter. This letter is used by the library to make claims on serial items that were not received or were received damaged.

Initial screen

```
                                CLAIM MESSAGE CODES

Number of records : 2
Code   Description of code
-----
1. DAMG   Item received damaged
2. INC    Item received incomplete

Options:
? help   Add item   # line   Print   Forward   Backward   Search jump
Exit
```

Detail Screen

A sample detail screen shows the code DAMG.

```
                                CLAIM MESSAGE CODES

: DAMG
-----
1. Description           : Item received damaged
2. Message              : THIS ITEM WAS RECEIVED DAMAGED.

Options:
? help   # line   Line by line   Copy   Print   Delete   Exit
```

Fields

<i>Claim Message Code</i>	[1-4 character code]
<i>1. Description</i>	[Text] Brief description of the Claim Message Code.
<i>2. Message</i>	[Text] The message to be printed. Up to 195 characters can be printed on the standard claim letter.

Where Used

You can assign a Claim Message Code on the Serials Control screen:

- CLAIM DETAILED DISPLAY — (in the *MESSAGE* field).

Common Table This table is common to both the Serials and Acquisitions Modules. Care should be taken when making changes to this table, because changes can affect both modules.

Claim Cycle Codes (CLMCD)

Enter CLMCD or the corresponding menu number to access the CLAIM CODES table.

You can assign Claim Cycle Codes to purchase orders or serial copy sets and default cycle codes to vendors. The system-generated action dates can also be overridden. The *Allow system to autogenerate claims* field in the FISCAL PROFILE table determines whether the system generates claim letters or just reports the need for a letter (in verification reports).

Initial screen

```

                                CLAIM CODES
Number of records : 3
Code Description of code
-----
1. DEF   Default Claim Cycle
2. FAST  Fast Claim Cycle
3. SLOW  Slow Claim Cycle

Options:
? help  Add item  # line  Print  Forward  Backward  Search Jump
Exit

```

Detail Screen

```

                                CLAIM CODES
: DEF
-----
1. Description                : Default Claim Cycle
2. Claim 1 (# days)          : 0
3. Claim 2 (# days)          : 15
4. Claim 3 (# days)          : 0
5. Claim 4 (# days)          : 0
6. Cancel (# days)           : 7

Options:
? help  # line  Line by line  Copy  Print  Delete  Exit

```

Common Table	<p>This table is common to both the Serials and Acquisitions Modules. Care should be taken when making changes to this table, because changes can affect both modules.</p> <p>For serial items, <i>Claim 1</i> is not used. Instead, the <i>CLAIM DELAY</i> defined on the PUBLICATION PATTERN PREDICTIONS screen is added to the expected receipt date and this becomes the estimated delivery date. If the issue is not received by the estimated delivery date, a claim (the first claim) should be initiated. When the first claim is created, it is given an action date. The action date on a claim is the date by which you want a response from the vendor (i.e. either shipment of materials, notification of order or a new expected date for delivery). The <i>ACTION DATE</i> on the first claim is set to 15 days from the date the claim is created.</p> <p>If the claim is still outstanding when the action date comes around, the system will reissue the claim to the vendor and wait an additional 7 days before an issue has its status set to <i>missing</i>.</p>
--------------	---

Fields

<i>Claim Code</i>	[1-6 character code]
1. <i>Description</i>	<p>[Text]</p> <p>Brief description of the Claim Code.</p>
2. <i>Claim 1 (# days)</i>	<p>[Numeric]</p> <p>This field has no effect on serials claiming. It is only used for claiming monographs in Acquisitions.</p> <p>The system uses the value of <i>CLAIM DELAY</i> field on each serials PUBLICATION PATTERN screen (PUBM), in place of the <i>Claim 1</i> value. For example, a first claim should be generated (or the need for one should be reported) 'claim delay' days after the expected date.</p>
3. <i>Claim 2 (# days)</i>	<p>[Numeric]</p> <p>The number of days after the first claim date that the system should generate another claim letter or report the need for one.</p> <p>When the first claim transaction is generated, the system will add this number of days to the current date to determine a default claims <i>ACTION DATE</i>, which is shown on some Serials Control screens.</p>

- | | |
|----------------------------|--|
| 4. <i>Claim 3 (# days)</i> | [Numeric]

The number of days after the second claim date that the system should generate another claim letter or report the need for one. |
| 5. <i>Claim 4 (# days)</i> | [Numeric]

The number of days after the third claim date that the system should generate another claim letter or report the need for one. |
| 6. <i>Cancel (# days)</i> | [Numeric]

The number of days after the final claim date that the system should mark the copy as missing and generate a missing copy report.

You may leave any of these fields empty, including intermediate periods in the cycle; you do not need to use all four claims before the issue is marked as <i>missing</i> . If the field 6 (<i>Cancel (# days)</i>) is left empty, the system will not mark the issue as <i>missing</i> at the end of the claim cycle. |

Where Used

You can assign Claim Cycle Codes on the Serials Control screens:

- VENDOR HEADER SCREEN — (in the *CLAIM CODE* field).
- SERIAL COPY SET DETAIL screen — (in the *CLM CODE* field).

Library Code (LIBCD)

Enter LIBCD or the corresponding menu number to access the LIBRARY CODES table.

The Serials Control Module recognizes institutions within the library by their Library Codes. You can assign a Library Code to each serials order.

The code assigned determines the bill-to address and the default ship-to addresses. By assigning a code, the library can keep a separate budget for each institution in the library system. Most acquisitions reports are broken down by this code. Many libraries will define only one Library Code for general use, and perhaps one for staff training on the system.

Initial screen

```

                                LIBRARY CODES
Number of records : 4
Code      Description of code
-----
1. ADMIN  Head Office and Administration
2. CENT   Central Library
3. MED    Medical Institute of Technology
4. TRAIN  Training

Options:
? help   Add item # line Print Forward Backward Search Jump
Exit

```

Detail Screen

A sample detail screen presents the code ADMIN.

```

                                LIBRARY CODES
: ADMIN
-----
1. Institution Name      : Head Office and Administration
2. Default SHIP TO code : CENT = Central Library - Serials Control Dept.
3. Default BILL TO code : CENT = Central Library - Serials Control Dept.
4. Library defined ident : 1234
5. Default PO format    :

Options:
? help # line Line by line Copy Print Delete Exit

```

Common Table This table is common to both the Serials and Acquisitions Modules. Care should be taken when making changes to this table, because changes can affect both modules.

Fields

Library Code [1-6 character code]

1. *Institution Name* [Text]

Brief description of the Library Code. This text is printed on report headings.

2. *Default SHIPTO code* [0-6 character code]

Enter a valid Ship To Code. When you enter a Library Code at the ORD - BIBLIOGRAPHIC ENTRY/UPDATE screen in Acquisitions, the system will use the shipping code specified in this field as the default for shipping information.

For serials items transferred from Acquisitions to Serials Control, this code is used as the default *SHIPTO* code on the COPY SET EDIT screen. Within Acquisitions, however, you can override this default by entering a different *Ship To Code* at the ORD - ALLOCATIONS screen.

To see the SHIP TO CODES table, type ?? in this field and <ENTER>.

Do NOT leave this field empty.

[0-6 character code]

3. *Default BILL TO code*

Enter a valid Bill To Code. By specifying a Library Code at the ORD - BIBLIOGRAPHIC ENTRY/UPDATE screen in Acquisitions, you can also determine what billing address the system will use.

To see the BILL TO CODES table, type ?? in this field and <ENTER>.

If you leave this field empty in the table, the system will not use billing information.

4. *Library defined ident* [Text]

Enter an alternate name or number for the Library Code - for example, an identifier used by the library's financial services department.

Currently, this code has no effect on the system and is commonly left empty.

5. Default PO format

[0-8 character, PO format code]

The default purchase order format used by Acquisitions may be set up based on the LIBRARY code. If field 5 does not contain a default PO format, the default PO format is taken from the FISCAL PROFILE record. In either case, the default format is used only when the vendor has no default ORDER METHOD (and therefore no PO format) defined. May be used to separate purchase order printing by LIBRARY code.

Where Used

You can assign Library Codes on the screen:

- VENDOR HEADER SCREEN — (in the *LIBRARY* field).

Shown on the Vendor Browse list (VENDOR SEARCH AND RETRIEVAL screen) when assigning a vendor to a copy set.

Country Code (CNTCD)

Enter CNTCD or the corresponding menu number to access the COUNTRY CODES table.

This table enables your library to assign a country code to each vendor. This enables the full name of the country to be printed as the bottom line of the vendor's address. In addition, some reports can be sorted by country.

Initial screen

```
                                COUNTRY CODES
Number of records : 6
Code   Description of code
-----
1. AUS   Australia
2. CAN   Canada
3. ENG   England
4. IRE   Ireland
5. NZ    New Zealand
6. USA   United States of America

Options:
? help  Add item  # line  Print  Forward  Backward  Search Jump
Exit
```

Detail Screen

This sample detail screen lists the code NZ.

```
                                COUNTRY CODES
: NZ
-----
1. Name of Country      : New Zealand

Options:
? help  # line  Line by line  Copy  Print  Delete  Exit
```

Fields

<i>Country Code</i>	[1-8 character code]
<i>1. Name of Country</i>	[Text] Full name of the country.

Where Used

You can assign Country Code on the Serials Control screen:

- VENDOR ADDRESS SCREEN —(in the *COUNTRY* field).

Common Table	This table is common to both the Serials and Acquisitions Modules. Care should be taken when making changes to this table, because changes can affect both modules.
--------------	---

Vendor Status Code (VENST)

Enter VENST or the corresponding menu number to access the VENDOR STATUS CODES table.

This table enables your library to assign a code to each vendor to control the use of the vendor on serials orders.

Initial screen

This screen shows sample codes.

```
VENDOR STATUS CODES

Number of records : 3
Code      Description of code
-----
1. ACTIVE  Active
2. BLIST   Vendor is blacklisted
3. GONE    Vendor has gone out of business

Options:
? help   Add item  # line  Print  Forward  Backward  Search Jump
Exit
```

Detail Screen

This sample detail screen lists the code GONE.

```
VENDOR STATUS CODES

: GONE
-----
1. Description                : Vendor has gone out of business
2. Active/okay to use (1 = YES) : 0

Options:
? help  # line  Line by line  Copy  Print  Delete  Exit
```

Fields

<i>Vendor Status Code</i>	[1-8 character code]
<i>1. Description</i>	[Text] Brief description of the Vendor Status Code.
<i>2. Active/okay to use</i>	[0-1 as defined below]
0 or empty	No, the vendor cannot be used.
1	Yes, the vendor can be used.

Where Used

You can assign Vendor Status Code on the Serials Control screen:

- VENDOR HEADER SCREEN —(in the *STATUS* field).

Shown on the Vendor Browse list (VENDOR SEARCH AND RETRIEVAL screen) when assigning a vendor to a copy set.

Common Table	This table is common to both the Serials and Acquisitions Modules. Care should be taken when making changes to this table, because changes can affect both modules.
--------------	---

Vendor Type Code (VENTP)

Enter VENTP or the corresponding menu number to access the VENDOR TYPE CODES table.

This table allows your library to assign a Vendor Type Code to each vendor. This code indicates whether the vendor is a supplier, publisher, agent, donor, or exchange partner. This information is used on reports.

Initial screen

This screen shows sample codes.

```

                                VENDOR TYPE CODES

Number of records : 5
Code  Description of code
-----
1. AGEN  Agent
2. DONO  Donor
3. EXCH  Exchange partner
4. PUBL  Publisher
5. SUPP  Supplier

Options:
? help  Add item  # line  Print  Forward  Backward  Search Jump
Exit
    
```

Detail Screen

This sample detail screen lists the code DONO.

```

                                VENDOR TYPE CODES

: DONO
-----
1. Description          : DONOR
2. Type                : 2
   0 - supplier
   1 - exchange partner
   2 - donor
   3 - publisher

Options:
? help  # line  Line by line  Copy  Print  Delete  Exit
    
```

Fields

<i>Vendor Type Code</i>	[1-4 character code]
<i>1. Description</i>	[Text] Brief description of the Vendor Type Code.
<i>2. Type</i>	[0-3 as defined below]
0	Supplier. A supplier is a standard type of vendor that would use the normal billing procedures.
1	Exchange partner. An exchange partner is usually another library with special arrangements for trading serials items. There may not be any funds allocated because there is usually a value for value trade.
2	Donor. A donor is usually a private individual or institution providing serials items to the library as a gift without financial compensation. There is no billing requirement. A monetary value may be assigned to the gift for accounting and insurance purposes.
3	Publisher. A publisher is different from a normal vendor, in that normal vendors are middle men between a library and a number of publishers. This vendor type means that the library is dealing directly with a publisher. This may be the arrangement when a library requires large orders from a specific publisher.

Where Used

You can assign Vendor Type Code on the Serials Control screen:

- VENDOR HEADER SCREEN —(in the *TYPE* field).

Shown on the Vendor browse list. (VENDOR SEARCH AND RETRIEVAL screen)

Common Table	This table is common to both the Serials Control and Acquisitions Modules. Care should be taken when making changes to this table, because changes can affect both modules.
--------------	---

Vendor Usage Code (VENUS)

Enter VENUS or the corresponding menu number to access the VENDOR USAGE CODES table.

This table allows your library to assign a Usage Code to each vendor. This code is used as a guide for staff who are placing orders and indicates the kind of materials that may be ordered from the vendor. The code is for information only; the system does not use it to control which vendors can be assigned to which orders.

Initial screen

This screen shows sample codes.

```
VENDOR USAGE CODES

Number of records : 4

Code  Description of code
-----
1. BOOK  Books only
2. NEWS  Newspapers only
3. REG   All books and serials
4. SER   Serials only

Options:
? help  Add item  # line  Print  Forward  Backward  Search Jump
Exit
```

Detail Screen

This sample detail screen lists the code NEWS.

```
VENDOR USAGE CODES

: NEWS
-----
1. Description           : Newspapers only

Options:
? help  # line  Line by line  Copy  Print  Delete  Exit
```


Fields

<i>Vendor Usage Code</i>	[1-4 character code]
<i>1. Description</i>	[Text] Brief description of the Vendor Usage Code.

Where Used

You can assign Vendor Usage Code on the Serials Control screen:

- VENDOR HEADER SCREEN —(in the *USAGE* field).

Common Table	This table is common to both the Serials and Acquisitions Modules. Care should be taken when making changes to this table, because changes can affect both modules.
--------------	---

ISO Currency Code (ICURR)

ISO Currency Codes are used when exchanging transactions (i.e. serial invoices) electronically with a vendor. Acquisitions is installed with 22 ISO Currency Codes. The library can add more ISO currency codes if necessary. These codes are defined in the ISO 4217 standard. Each Currency Code (CURRC) must have an associated ISO Currency Code assigned to it if the library wishes to exchange transactions electronically.

Access Select the ISO CURRENCY CODES table on the CONTROL TABLE MENU, or enter the screen identifier ICURR on any Serials Control menu.

Initial Screen

ISO CURRENCY CODES	
Number of records : 22	
Code	Description of code

1. ATS	Schilling
2. AUD	Australian Dollar
3. BEF	Belgian Franc
4. CAD	Canadian Dollar
5. CHF	Swiss Franc
6. CNY	Yuan Renminbi
7. CUP	Cuban Peso
8. DDM	Mark der DDR
9. DEM	Deutsche Mark
10. DKK	Danish Krone
11. FIM	Markka
12. FRF	French Franc
13. GBP	Pound Sterling
14. HKD	Hong Kong Dollar

Options:
? help Add item # line Print Forward Backward Search jump
Exit

Detail Screen

```

                                ISO CURRENCY CODES

                                : CAD
                                -----
1. Currency description          : Canadian Dollar
   Valid ACQ currency codes     : CDN

Options:
? help   # line   Line by line   Copy   Print   Delete   Exit

```

Fields

- | | |
|------------------------------------|---|
| ISO Currency Code | [3 characters]
Name of code, according to the ISO 4217 standard. |
| <i>1. Currency description</i> | [any]
Brief description of the ISO Currency Code. |
| <i>2. Valid ACQ currency codes</i> | Display-only field of Acquisitions Currency Codes associated with this ISO Currency Code. A Currency Code is added to this list by assigning the ISO Currency Code in the Currency Codes table. |

Where Assigned

- Setup Table
- CURRENCY CODES (CURRC)

Currency Code (CURRC)

Enter CURRC or the corresponding menu number to access the CURRENCY CODES table.

This table enables your library to assign a code from a table to handle multiple currencies. The system uses the rates specified in this table to convert dollar amounts to a base currency for encumbrance and payment. You can attach Currency Codes to serials orders, and you can assign a default currency code to each vendor.

The library will need to update this table frequently to reflect changes in exchange rates. Changing a rate will affect future orders and invoices, **not** the already encumbered amounts of unpaid purchase orders and invoices.

Initial screen

This screen presents sample codes.

```

                                CURRENCY CODES
Number of records : 5
Code   Description of code
-----
1. AUS   Australia dollar
2. CDN   Canada dollar
3. BELG  Belgium franc
4. UK    United Kingdom pound
5. US    United States dollar

Options:
? help  Add item  # line  Print  Forward  Backward  Search Jump
Exit

```

Detail Screen

This sample detail screen lists the code AUS.

```

                                CURRENCY CODES
: AUS
-----
1. Currency description : Australia dollar
2. Exchange rate       : 1.10
3. ISO Currency code   : AUD = Australian Dollar

Options:
? help  # line  Line by line  Copy  Print  Delete  Exit

```

Fields

<i>Currency Code</i>	[1-8 character code]
1. <i>Currency description</i>	[Text] Brief description of the Currency Code.
2. <i>Exchange rate</i>	[4 numbers] The multiplier that will convert an amount in this currency to the base currency. You may enter up to 5 numbers with a decimal point, or 6 numbers without a decimal point. The base currency is defined as 1.0000, even if you do not purposely create a particular Currency Code for it.
3. ISO Currency code	[ISO Currency Code, 3 characters] ISO Currency Code that corresponds to this Currency Code in Acquisitions. This field is used when exchanging transactions (i.e. serial invoices) electronically with a vendor.

Where Used

You can assign Currency Codes on the Serials Control screen:

- VENDOR HEADER SCREEN —(in the *CURRENCY* field).

Common Table	This table is common to both the Serials and Acquisitions Modules. Care should be taken when making changes to this table, because changes can affect both modules.
--------------	---

Payment Type Code (PAYTP)

Enter PAYTP or the corresponding menu number to access the PAYMENT TYPE CODES table.

This table enables your library to assign a code to an order, to affect how money is spent by the system. In addition, a default code can be assigned to each vendor. The library does not have to define all four possible codes, and, it can, for reporting purposes, create multiple codes for the same payment action.

Initial screen

This screen presents sample codes.

```

                                PAYMENT TYPE CODES

Number of records : 7
Code   Description of code
-----
1. CASH   PETTY CASH
2. DEP   DEPOSIT ACCOUNT
3. FREE   FREE
4. GIFT   GIFT
5. MEM   MEMBERSHIP
6. PAY   REGULAR PAYMENT
7. PRE   PREPAYMENT

Options:
? help  Add item  # line  Print  Forward  Backward  Search Jump
Exit
```

Detail Screen

This sample detail screen shows the code PAY.

```

                                PAYMENT TYPE CODES

                                : PAY
                                -----
1. Description                    : REGULAR PAYMENT
2. Payment Action                 : 0
   0 - Expense on Invoice Payment
   1 - Pay against Deposit Account
   2 - No Expense
   3 - Prepayment Required

Options:
? help  # line  Line by line  Copy  Print  Delete  Exit

```

Fields

Payment Type Code [1-8 character code]

1. Description [Text]

Brief description of the Payment Type Code.

2. Payment Action [0-3 as defined below]

0 Spend when item is invoiced and invoice is paid.

1 Debit the balance of the deposit account fund when item is invoiced.
(The amount is already spent.)

2 No payment is expected.

3 Prepayment required. The system prints prepayment orders together so that they can be sent to the invoicing department and paid before being sent to the vendor.

Where Used

You can assign Payment Type Codes on the Serials Control screen:

- VENDOR HEADER SCREEN —(in the *PAY TYPE* field).

Common Table This table is common to both the Serials and Acquisitions Modules. Care should be taken when making changes to this table, because changes can affect both modules.

Order Method Code (ORDMTH)

Enter ORDMTH or the corresponding menu number to access the ORDER METHOD CODES table.

This table allows your library to assign a code to each vendor to control the printing, transmission, and default format of serials orders to that vendor.

Initial screen

```

                                ORDER METHOD CODES

Number of records : 3
Code  Description of code
-----
1. BSCPO  BISAC.ordering
2. MULTI  Multiple-line order
3. REGPO  Regular PO -Print, mail and label

Options:
? help  Add item  # line  Print  Forward  Backward  Search Jump
Exit

```

Detail Screen

This sample detail screen presents the code REGPO.

```

                                ORDER METHOD CODES

: REGPO
-----
1. Description                : Regular PO - Print, mail and label
2. Mode of transmission       : 0
   0 - mail
   1 - BISAC
   2 - X12 (future)
3. Print paper copy (1 = YES) : 1
4. Default PO format         : BOOKPO = Regular Book PO

Options:
? help  # line  Line by line  Copy  Print  Delete  Exit

```

Fields

Order Method Code [1-6 character code]

1. *Description* [Text]

Brief description of the Order Method Code.

2. *Mode of transmission* [0-2 as defined below]

0 Send order by mail using paper copies.

1 Electronically transmit the order using BISAC ordering stream. Some vendors will have an arrangement with your library, where orders are sent to the vendor's computer by the ADVANCE Library System computer over special telephone or data lines. There is no need for a paper copy in this case.

2 Electronically transmit the order using X12 ordering stream (future)

3. *Print paper copy* [0-1 as defined below]

0 No, do not print a copy.

1 Yes, print a copy of the order.

If the mode of transmission is 0 (order by mail), the system will always print a copy of the order (except a pseudo order). If the mode of transmission is 1 or 2, this question asks whether a paper copy of the PO should **also** be produced.

4. *Default PO format* [0-10 character code]

A valid PO Print Format Code. This code determines the format of the printed Purchase Order.

To see the PO PRINT FORMAT CODES table, enter ?? in this field.

Where Used

You can assign Order Method Codes on the Serials Control screen:

- VENDOR NOTES —(in the *ORDER METHOD* field).

Common Table This table is common to both the Serials and Acquisitions Modules. Care should be taken when making changes to this table, because changes can affect both modules.

Ship To Code (SHPTO)

Enter or SHPTO or the corresponding menu number to access the SHIP TO CODES table.

Ship To Codes store full addresses, phone numbers, and related information for future retrieval. You can use this information to print shipping information on serial orders, claims, and cancellation letters and to drop-ship items to various locations. These codes facilitate decentralized receiving of serials items.

Initial screen

```

                                SHIP TO CODES

Number of records : 3
Code   Description of code
-----
1. CENT   Central Library - Serials Control Dept.
2. FAIR   Fairway Public Library
3. MED    Medical Institute of Technology - Serials Control Dept.

Options:
? help   Add item  # line  Print  Forward  Backward  Search Jump
Exit
```

Detail Screen

```

                                SHIP TO CODES

                                : CENT
                                -----
1. Name                          : Central Library - Serials Control Dept.
2. Address 1                      : 123 First Street
3. Address 2                      : P.O. Box 1233
4. Address 3                      :
5. City, Prov/State, Postal/ZIP: New York, New York, 14616
6. Contact/Attention              : THE LIBRARIAN
7. Phone                          : (703) 123-1233
8. SAN                            : 1232143
9. Exchange Partner (1 = yes)    : 0

Options:
? help # line Line by line Copy Print Delete Exit

```

Fields

<i>Ship To Code</i>	[1-6 character code]
<i>1. Name</i>	[Text] Brief description of the Ship To Code.
<i>2. Address 1</i>	[Text] First line of the shipping address.
<i>3. Address 2</i>	[Text] Second line of the shipping address.
<i>4. Address 3</i>	[Text] Third line of the shipping address.
<i>5. City, Prov/State, Postal/ZIP</i>	[Text] Final line of the shipping address where the city, province or state, country, and postal or zip code should be entered (separated by ',').

6. <i>Contact/Attention</i>	[Text] Library contact person for shipped materials.
7. <i>Phone</i>	[Text] Phone number of the library contact person.
8. <i>SAN</i>	[Text] Standard Address Number of this library address.
9. <i>Exchange Partner</i>	[0-1 as defined below]
0 or empty	This Ship To Code does not describe an exchange partner.
1	This Ship To Code describes an exchange partner. You can assign this code when the library sends material to the partner, or when the library has a vendor send material directly to the partner.

You may leave any of these fields empty, including lines at the end of the shipping address.

Where Used

You can assign Ship To Codes on the Serials Control screens:

- VENDOR NOTES —(in the *SHPTO* field).
- SERIAL COPY SET DETAIL —(in the *SHPTO* field).

Common Table This table is common to both the Serials and Acquisitions Modules. Care should be taken when making changes to this table, because changes can affect both modules.

Numbering Codes (NUMB)

Enter NUMB or the corresponding menu number to access the NUMBERING CODE table.

The Numbering Codes determine whether enumeration numbering sequences restart or run continuously. Deciding which code to assign is based on the requirements of the serial item's enumeration terms.

Initial screen

```
                                NUMBERING CODE - (NUMB)

Number of records : 2
Code  Description of code
-----
1. C   Continuous Numbering
2. R   Restart Numbering

Options:
? Help  Add item  # line  Print  Forward  Backward  Search jump
Exit
```

Detail Screen

This sample detail screen is for the code C.

```
                                NUMBERING CODE - (NUMB)

                                : C
                                -----
1. Description      : Continuous Numbering
2. Type            : 0
   0 - Continuous
   1 - Restart

Options:
? Help  # line  Line by line  Copy  Print  Delete  Exit  File
```

Fields

Numbering Code

[1-3 character code]

1. Description

[Text]

Brief description of the Numbering Code.

2. Type

[1 digit]

Enter one of the numeric codes shown on the screen. These codes correspond to the two types of numbering codes: continuous and restart / reset.

Where Used

You can assign Numbering Codes on the:

- PUBLICATION PATTERN DETAIL — (in the *Numbering Code* field).

Publication Regularity (PREG)

Publication Regularity codes enable the system to predict a serial item's publication dates.

Access

Enter PREG or the corresponding menu number to access the PUBLICATION REGULARITY CODE table from the:

- Holdings Setup Menu (CHSM)
- Serials Control Code Table (CODM).

Initial screen

```
                PUBLICATION REGULARITY CODE - (PREG)

Number of records: 5
Code              Description of code
-----
1. D              Daily
2. E              Erratic
3. M              Months
4. S              Seasons
5. U              Monthly (by user)

Options:
? help  Add item  # line  Print  Forward  Backward  Search jump
Exit
```

Detail Screen

```
PUBLICATION REGULARITY CODE - (PREG)

: D
-----
1. Description      : Daily
2. Type            : 0
  0 - Days
  1 - Seasons
  2 - Months
  3 - Erratic
  4 - Monthly (defined by user)

Options:
? help  # line  Line by line  Copy  Print  Delete  Exit
```

Fields

Publication Regularity Code [1 character code]

1. Description [Text]

Brief description of the Publication Regularity Code.

2. Type [1 digit]

Enter one of the numeric codes shown on the screen. These codes correspond to the five types of regularity codes: day/week based, seasonal, month/year based, irregular (erratic), and monthly (defined by user). The monthly choice allows you to define the exact dates when an issue is expected.

Where Used

You can assign Publication Regularity Codes on the:

- PUBLICATION PATTERN DETAIL —(in the *REGULARITY PATTERN* field).

Publication Regularity Labels (PREGL)

Enter PREGL or the corresponding menu number to access the VALID REGULARITY PATTERN LABELS table.

From this table you can specify the display labels that define the number of issues published in each chronological period, such as a month or a week. This table facilitates translating publication regularity labels to another language.

Initial screen

```

VALID REGULARITY PATTERN LABELS

: PUB.REG.DFLT
-----
1. Valid labels for Monthly/Seasonal pattern: JA,FE,MR,AP,MA,JN,JL,AU,SE,+
2. Valid labels for Daily pattern           : SU,MO,TU,WE,TH,FR,SA

Options:
? Help  # line  Line by line  Print  Exit  File
    
```

Detail Screen

Not required.

Fields

PUB.REG.DFLT

[Text]

Name of the file containing the labels.

1. *Valid labels for Monthly/Seasonal pattern*

[Text]

Enter 12 labels for a monthly or seasonal regularity pattern. Labels should be 2 characters long and separated by commas. The commas will not appear where these labels are used. The following are examples of a monthly regularity pattern:

JA,FE,MR,AP,MA,JN,JL,AU,SE,+

2. *Valid labels for Daily pattern* [Text]

Enter 7 labels for a daily regularity pattern. Labels should be 2 characters long and separated by commas. The commas will not appear where these labels are used. The following are examples of a daily regularity pattern:

SU , MO , TU , WE , TH , FR , SA

Where Used

The system displays Valid Regularity Pattern Labels on the:

- PUBLICATION PATTERN DETAIL screen — The labels are used in the *REGULARITY PATTERN* field.

5

Control Setup Tables

This chapter describes the Serials Control Control Setup tables. The code tables are discussed in the order that they occur on the SERIALS CONTROL CONTROL MENU. The exception is Calendar Processor Codes, which is discussed in the *Calendar Processor* chapter.

A general description of the setup table menus, and instructions on adding and updating the codes in the tables, are found in Chapter 3.

List of Control Code Tables

The Serials Control Control Codes tables are:

1. CSNO — Copy Set Format
2. CLNO — Claim Number Format
3. SCP — Calendar processor codes — (*Discussed in the next chapter*)
4. FISCL — Fiscal Profile
5. SMAT — Valid Material codes
6. SLBL — Serial Label Display
7. CUDEF — User Defaults

Also described in this chapter, is the setup for the Serial routing list:

RFMT — Routing Slip Format

Control Code Tables Descriptions

This section contains descriptions of each control code table available in the Serials Control Module.

CAUTION Do not delete codes that are currently “in use” in the database. The system cannot automatically remove codes from existing copy sets, vendors, publication patterns, etc. If you want to delete a code, remove the code from the areas where the code is used before you delete the code from the setup table. Also, before deleting a code, check if the code is used as a default in other setup tables. Remove the code from these areas too.

Copy Set Format

The Copy Set Format option enables your library to:

- assign a format to an internal copy set accession number
- set a number for starting copy set number count.

These two points are addressed by entering a single number.

The general form of the number entered sets the copy set accession number format. The number can be a maximum of 10 characters long. For example, the first part of the number could represent the year. The year “**1997**” could be represented by one of the two numbers: 9700000001 or 1997000001.

The copy set number entered on this screen is also used by the system to start the counting sequence. The system uses the extreme right-hand digit of the copy set number to begin the count. The two numbers used as an example in the previous paragraph, indicate to the system that the count should begin using the number 1.

Enter 1, or CSNO, to access the COPY SET NUMBER table.

```

                                COPY SET NUMBER

                                : #NEXT.SCPY.KEY
                                -----
                                1. Next Copy Set #: 9700000204

Options:
? Help  # line  Line by line  Print  Exit  File

```

Fields

Copy Set Number Code [Alphanumeric]

Displays code defined in this table.

1. *Next Copy Set #* [Numeric]

The system assigns the number stored in this field to the next copy set entered into the system. The system then increments this number by one and assigns the new number to a subsequent copy set. This copy set accession number can have a specific format using up to 10 characters. For example, the first part of the number can have the current year incorporated, as follows: 970003333. Later, you can modify this number to start a new range of copy set numbers, perhaps at year end.

Where Used

You can use the copy set accession number in reports for data selection. The system also uses the number, prefixed by a “P”, as the Routing ID for a specific copy set routing list.

Claim Number Format

Enter 2, or CLNO, to access the CLAIM NUMBER FORMAT table.

The Claim Number Format option on the SERIALS CONTROL CONTROL MENU enables your library to:

- assign a format to the claim number
- set a number for starting claim number count.

These two points are addressed by entering a single number.

The general form of the number you enter sets the claim number format for serial claims. The number can be a maximum of 9 characters long. For example, the first part of the number could represent the year. The year “1997” could be represented by one of the two numbers: 970000001 or 199700001.

The claim number entered on this screen is also used by the system to start the counting sequence. The system uses the extreme right-hand digit of the claim number to begin the count. The two numbers, used in the previous paragraph as an example, indicate to the system that the count should begin using the number 1.

```
CLAIM NUMBER

: #NEXT.SCLM.KEY
-----
1. Next Claim #: 970000345

Options:
? Help  # line  Line by line  Print  Exit  File
```

Fields

Claim Number Code [Alphanumeric]
Displays code defined in this table.

1. *Next Claim #* [Numeric]
The system assigns the number stored in this field to the next serial claim entered into the system. The system then increments this number by one and assigns the new number to a subsequent claim. This claim number can have a specific format using a maximum of 9 characters. For example, the first part of the number can have the current year incorporated, as follows: 199700333. Later, you can modify this number to start a new range of claim numbers, perhaps at year end.

Where Used

You can see the Claim Number used on the Serials Control screen:

- CLAIM DETAILED DISPLAY — This number appears in the *CLAIM #* field.

The CLAIM DETAILED DISPLAY screen can be accessed indirectly through the Checkin Screen using the *Claims* option. Alternatively, you can go directly to CLAIM DETAILED DISPLAY by using the TX search code at the BIBLIOGRAPHIC SEARCH screen.

Fiscal Profile

Enter 4, or FISCL, to access the FISCAL PROFILE table.

The Fiscal Profile option enables your library to set up two Serials-specific fiscal defaults.

```

                                FISCAL PROFILE

                                : SER.CTL*FISCAL
                                -----
                                1. Allow system to autogenerate claims? (1=YES)   : 1
                                2. Default message code for autogenerated claims : NRCV = Item not rec+

Options:
? Help  # line  Line by line  Print  Exit  File

```

Fields

- | | |
|--|---|
| 1. <i>Allow system to autogenerate claims</i> | [0-1 as defined below] |
| 0 or empty | The system only reports the need for claim letters and missing issue status changes in corresponding verification reports. The system determines these needs using dates determined by the library-defined cycle in the CLAIM CODES table. |
| 1 | The system automatically generates claim letters and sets issue statuses to “missing”. This is done using dates determined by the library-defined cycle in the CLAIM CODES table. |
| 2. <i>Default message code for auto-generated claims</i> | [1-4 character code] |
| | Enter a valid Claim Message Code that describes what is occurring when the autogenerate feature is activated. The code must be a valid entry taken from the CLAIM MESSAGE CODES table found on the SERIALS |

CONTROL CODE TABLE MENU. The claim message code has a previously determined or canned message attached. The message is printed on each claim.

You can see the results of the Fiscal Profile settings when claims are printed.

Valid Serial Material Codes

Enter 5, or SMAT, to access the VALID SERIAL MATERIAL CODES table.

The Valid Serial Material Codes option enables the ADVANCE Library System to differentiate between serials items and other items in the database. As a means of differentiating between serials and other items, the library defines a list of material codes that are valid for items checked in through the Serials Control Module.

For example, when using the ordering feature within the Acquisitions Module, the BIBLIOGRAPHIC ENTRY/UPDATE screen requires a valid serial material code. The code is entered at the *MATERIAL CODE* field, and it enables an order to be processed as a serials item. Without this code, a serials item ordered through Acquisitions could not be handled by Serials Control.

```

                                VALID SERIAL MATERIAL CODES

                                : SER.MATERIAL
                                -----
                                1. Valid material codes      : as,cs,ds,es,fs,is,js,ms

Options:
? Help  # line  Line by line  Print  Exit  File

```

Fields

Valid Serial Material Codes [Alphanumeric]
Displays code defined in this table.

1. *Valid material codes* [Text]
Enter material codes that your library requires to be attached to a serials item. Use commas (,) to separate each code.

Where Used

You can assign Valid Serial Material Codes on the Acquisitions screen:

- BIBLIOGRAPHIC ENTRY/UPDATE — This code is assigned in the *MATERIAL CODE* field.

The system also checks that a bibliographic item has a valid serial material code before allowing retrieval from the Cataloguing indexes into Serials Control.

Serial Label Display

Enter 6, or SLBL, to access the SERIAL CONTROL LABEL DISPLAY table.

The Serials Control Label Display option enables your library to assign its own column headings for Institution and Sublocation. Entries made on this screen appear as column headers in Serials Control Checkin screens:

- SUMMARY HOLDINGS STATEMENTS FOR Ship To Code screen
- CHECKIN COPY SETS and CHECKIN MULTIPLE COPY SETS status windows

```

SERIALS CONTROL LABEL DISPLAY

SERIALS CONTROL LABEL DISPLAY : SER.LABEL.DISPLAY
-----
1. Institution wording           : CAMPUS
2. Sublocation wording         : LIBRARY

Options:
? Help  # line  Line by line  Print  Exit  File

```

Fields

Serials Control Label Display [Alphanumeric]
Display of the file name

1. *Institution wording* [Text]
Displays the wording for the institution column name.

2. *Sublocation wording* [Text]
Displays the wording for the sublocation column name.

Where Used

Entries made on this SERIALS CONTROL LABEL DISPLAY will appear on the screens:

- All Serials Control headers.
- Claim Verification Report
- Routing Slips

User Defaults

Enter 7, or enter CUDEF on any Serials Control Menu to access the USER DEFAULTS table.

Each Serials user can be set up with several default values to control the display and prompting within Serials Checkin. *User* does not necessarily refer to a single staff member. The library can define User IDs (also called Identification Codes or Access Codes) that several people share. User IDs are defined in the Enter Access Codes function (EACC) of the Utilities module.

Initial Screen

Enter a valid User ID and <ENTER>. You can enter your own ID or another user's ID. Alternatively, leave the User ID field blank and <ENTER> to return to the SERIALS CONTROL CONTROL MENU.

```

                                USER DEFAULTS                                MASTER
Enter a USER id :

```

Detail Screen

```

                                USER DEFAULTS                                MASTER

USER ID                               : MASTER
1. CHECKIN SCREEN FORMAT                : 0
    (1=LIST, 0=BOXES)
2. PROMPT FOR COPIES AT CHECKIN OPTION: 1
    (1=YES, 0=NO)
3. PROMPT FOR BARCODE/NOTES AT CHECKIN: 1
    (1=YES, 0=NO)
4. DEFAULT SHIPTO CODE FOR CHECKIN      : SHP1

Options:
Line by line  # line  File  ? help  Exit

```

Fields

USER ID	[1-10 characters displayed]	The valid User ID which you entered to reach this screen.
1. CHECKIN SCREEN FORMAT	[0 or 1]	
0 or empty		The CHKM – CHECKIN FOR (SHIPTO CODE) screen displays eight boxes containing checkin information for the selected serial.
1		The CHKM – CHECKIN FOR (SHIPTO CODE) screen displays checkin information for the selected serial in list format. This list format can display the information for eight checkin items on each screen.
<i>NOT IN USE</i> Message		When the user scrolls backwards in a list of items and reaches the point where there is no more information to present, the system displays the message *** NOT IN USE ***. If the user has the box display, the boxes will be empty and no message appears.
2. PROMPT FOR COPIES AT CHECKIN OPTION	[0 or 1]	
0 or empty		When the user chooses checkin from the CHKM – CHECKIN FOR (SHIPTO CODE) screen, the system defaults to receive the total number of copies still not received for the specified issue, index, or supplement.
1		If more than one copy of a specified issue, index, or supplement needs to be received, the system prompts the user for the number of copies to Checkin when checkin is selected. If only one copy of a specified issue, index, or supplement needs to be received, the setting of this field has no effect, that is, the user will not be prompted for the number of copies to receive.
3. PROMPT FOR BARCODE/NOTES AT CHECKIN	[0 or 1]	
0 or empty		When the user chooses checkin from the CHKM – CHECKIN FOR (SHIPTO CODE) screen and the number of copies to receive equals the total number still not received for the specified issue, index, or supplement, the system automatically receives the outstanding copies without displaying the PART LOCATION SUMMARY screen.

- 1 When the user chooses checkin from the CHKM – CHECKIN FOR (SHIPTO CODE) screen, the system displays the PART LOCATION SUMMARY screen regardless of the number of copies being received. This screen enables the user to enter a barcode number and note for each copy of the issues.

4. DEFAULT SHIPTO CODE FOR CHECKIN

[Valid SHIPTO Code]

At checkin, the system determines which copy sets you can edit based on the SHIPTO Codes. When a SHIPTO Code is specified in this table, the system displays only the copy sets with this SHIPTO Code. If you are allowed to check in copy sets for more than one SHIPTO Code, ADVANCE displays the SHIPTO SELECTION screen. If you specify a default SHIPTO code and you only check in serials for one SHIPTO location, the SHIPTO SELECTION screen is skipped. By specifying a default SHIPTO Code, you can facilitate your workflow by eliminating the need to select or enter a SHIPTO Code.

If you enter an invalid code the system prompts:

Invalid SHIPTO Code. Do you wish to BROWSE (Y/cr = N)?

If you change the record and do not file the changes the system prompts:

Record had been modified. Do you still wish to discard the changes? (Y/N)

Routing Slip Format

Access the ROUTING SLIP FORMAT screen either by selecting 3 on the SERIALS CONTROL ROUTING MENU (RTEM) or by entering the screen identifier (RFMT) on any Serials menu.

```

RTEM - ROUTING SLIP FORMAT

1. PAGE SIZE: Maximum page width: (40,80): 40
2.           Header note           : *** ROUTING SLIP ***
3. BIB. INFO: Title: (X = Number of lines): 2
4.           Author                 : 1
5.           Subject                 : 0
6.           Call number             : 1
7.           Series                  : 1
8.           Imprint                 : 0
9.           Edition                 : 0
10.          Language                : 0
11. COPY SET : Institution: (1 = Included): 1
12.           Copy number (1 = Included): 1
13.           Notes (X = Number of lines): 5
14. RECIPIENT: Barcode: (X = Width): 0
15.           Name                   : 19
16.           Location               : 10
17.           Forwarding date        : 9

Options:
? help # line Line by line Print File Exit

```

Print sends a copy of the format to your printer.

File and *Exit* return you to the SERIALS CONTROL ROUTING MENU or other screen at which you entered the RFMT screen identifier.

Fields

The routing slip can be either 40 or 80 characters wide (field 1).

Field 2 (*Header note*) text will be centred on the first line of the slip.

For fields 3-10 and 13, specify the maximum number of lines you want printed per field. If a field's data does not require this amount of space, fewer (even zero) lines are printed. Specify 0 if you want the field always skipped. No more than 10 lines of *Notes* (field 13) can be printed.

For fields 11 and 12, specify 1 if you want the field printed and 0 if you do not.

For fields 14-17, specify the width of each column you want printed; specify 0 if you want the column omitted. The system truncates data that doesn't fit within its column, and leaves one space between columns. Be careful not to specify more than fits across your page. *Location* (field 16) is the Routing Location; *Forwarding Date* (field 17) is an underlined space for recipients to check off their name or write in a date.

```

*** ROUTING SLIP ***

DATE      : 03/18/93
TITLE     : Journal of Mountain Climatology
          : y
CALL#     : Q123 J777
CAMPUS    : CENTRL          COPY # : 1
ISSUE     : Vol.120 No.6 - 1992 OCT

Please route material to the following:

NAME              LOCATION   FORWARDED
-----
ZANER, ANDREA     211 Chem   _____
FIEF, STEPHEN     772-A Chem _____
ALVERXIE, ERIC B. Envir Ref  _____
GHOU, DENISE      L#397 Cent _____

```

Sample Routing Slip

This sample Routing Slip was generated from the format defined.

Fields

The slip's *DATE* field (when copy Received) and *ISSUE* field (enumeration and chronology) are mandatory.

6

Calendar Processor

This chapter describes the processing setup and operations offered through the SERIALS CONTROL CALENDAR PROCESSOR menu. Each code controls the automatic running of a Serials Control processing job.

This chapter also describes the processing jobs under the headings:

- Autogeneration of Claims/Missing Issues
- Serial Claim Print
- Serial Claim Verification
- Next expected calendar update

Calendar Processor Menu

The Serials Control Module has a background processor which can automatically carry out scheduled tasks, such as generating claims and missing item reports, printing serial claims, and so on. You can also manually execute these tasks, through an interactive mode, when the background processor is not turned on.

Access the SERIALS CONTROL CALENDAR PROCESSOR menu by entering 3 on the SERIALS CONTROL CONTROL MENU, or by entering the screen identifier SCP anywhere in Serials Control. This screen will appear.

```
DD MMM YY          Geac - Library Division - ADVANCE (#.##)      P P P P I I I I I I
HH:MM              Your Library Name

SERIALS CONTROL  CALENDAR  PROCESSOR

1. Processing Cycles
2. Execute production run
3. Send Outputs to Printer

Background Processor : Inactive
Last cycle check    :

Enter a selection , E to exit , <RETURN> to redisplay
```


Calendar Processor Options

- 1 Access the SERIALS CONTROL PRODUCTION CODES table and view or update the job definitions. (The background processor can be active or inactive).

To select this option, enter 1. The system will display the initial setup screen.

- 2 With the background processor de-activated, start a job immediately and interactively (instead of letting the background processor start it).

To select this option, enter 2. The system will prompt:

```
Enter Production Code:
```

Enter a Production Code (or ?? for a list) and the system will respond with the process's scheduled start time. If you then answer Y to override the time, the system will start the job immediately.

- 3 Print the output generated by a job, either to the print queue or to the screen. (The background processor can be active or inactive.) To select this option, enter 3. The system will prompt:

```
Enter Production Code:
```

Enter a Production Code (or ?? for a list) and the system will either say that no reports are available or display the PRODUCTION OPTIONS screen. On that screen, you can do any one of the following: exit (by using the *Prior screen* option), send the report to the terminal's screen, send the report to a print queue (if you want, you can specify a different print queue than the one defined for the process in the Production Code), or view the creation dates and times of retained reports for the specified Production Code (by using the *Select date* option). For more information about retaining copies of reports, see the discussion of the *# Days to retain reports* field in the section [Production Codes](#) on page 6-9. If the number of days to retain a report is **not** set, the system overwrites the old output with the new output every time a process runs.

When sending outputs to a printer, the system prompts the user to enter a form (printer) number. The system validates the specified form to determine if it is:

- a valid form and loaded on the printer
- a valid form but not loaded on the printer

- an undefined form.

If it is a valid form but not loaded, the system prompts you to determine whether you want to send your output to a printer queue. If you say yes, the output is kept in the queue until the forms are loaded.

- E Exit the screen and return to the CODE TABLES menu. To select this option, enter E.

blank option Redisplay the screen, updating the information in the *Background Processor* and *Last cycle check* fields.

To select this option, <ENTER>.

Fields

Background Processor [Active, date, time, [Production Code]]

The background processor was activated on the date and time shown. If a job is currently being executed, its Production Code is also displayed. For example:

```
Active 03-27-98 15:03:35 SCC
```

[Inactive]

The background processor is de-activated.

Last cycle check [date and time]

If the background processor is **active**, the system displays the date and time you last <ENTER> to update the information shown in the fields. For example:

```
03-27-98 15:03:35
```

[Production Code]

If the background processor is **inactive**, the system displays the name of the process (if any) that was running when you last <ENTER> to update the information shown in the fields. For example:

```
SCC
```

Turning the Background Processor On and Off

To activate or de-activate the background processor, advance to the ADVANCE Library System's Utility Menu and select the Batch/Background Processor Menu option. Access the SERIALS CONTROL BACKGROUND PROCESSOR screen by entering the screen identifier PSER. The options at the bottom of the screen enable you to activate or de-active the processor.

Most libraries will leave the background processor on all the time. This enables the background processor to run all processing jobs as the jobs have been scheduled.

Accessing Retained Reports

Reports generated from calendar processor jobs in Serials Control and Acquisitions may be retained for a specified period of time. The number of days that a report is kept is controlled by the *# Days to Retain reports* field in the Production Code record. System administrators should ensure that sufficient disk space is available for storing reports. If the *# Days to Retain reports* field is set to 0 or left blank, the system overwrites any existing reports every time the process runs.

Procedure

1. Select *Send Outputs to Printer* from the SERIALS CONTROL CALENDAR PROCESSOR menu.
2. The system prompts for a valid production code.
3. Enter a production code and <ENTER>.
4. The PRODUCTION OPTIONS FOR [PRODUCTION CODE] screen appears.
5. Choose the *Select date* option.

```

                                PRODUCTION OPTIONS FOR
LINE      PRODUCTION OPTION DESCRIPTION
-----
  1.      SERIAL VENDOR UPDATES

Options:
# line   Forward   Backward   Select date   Prior screen   ? help

```

Options

Select Date

Displays a list of creation dates and times for retained reports. The PRODUCTION OPTIONS FOR [PRODUCTION CODE] screen re-appears with a list of reports.

```

                                PRODUCTION OPTIONS FOR

                                Date    and Time  of  production run
                                -----
1.    02 MAR 98    08:59
2.    02 MAR 98    09:07
3.    02 MAR 98    09:12
4.    03 MAR 98    10:57

Options:
? help  Prior screen  # line
    
```

6. Select an item to display the description(s) of the report. For example, selecting #1 produces the following screen.

```

                                PRODUCTION OPTIONS FOR

LINE    PRODUCTION OPTION DESCRIPTION
-----
1.      SERIAL VENDOR UPDATES

Options:
# line  Forward  Backward  Select date  Prior screen  ? help
    
```

```
                                PRODUCTION OPTIONS FOR

LINE      PRODUCTION OPTION DESCRIPTION
-----
  1.      SERIAL VENDOR UPDATES

Send Job to (P)rinter or (T)erminal:
```

7. When an item is selected, the system prompts: *Send Job to (P)rinter or (T)erminal:.* Enter P or T.

If you choose the *Select date* option the system re-displays the list of dates and times of the production run.

Production Codes

The Production Codes are names for the system processing jobs. These codes are called Processing Cycles in the SERIALS CONTROL CALENDAR PROCESSOR menu. The library can schedule the background processor's start time for each job, ask that output be automatically printed, and so on.

Access the SERIALS CONTROL PRODUCTION CODES table by entering 1 on the SERIALS CONTROL CALENDAR PROCESSOR menu. This screen appears. (Calendar Processor).

Initial screen

SERIALS CONTROL PRODUCTION CODES			
Number of records : 4			
Code	Description of code		

1. SCC	Autogeneration of Claims/Missing	01 FEB 1998	10:19am
2. SCLMP	Serial Claim Printing	26 JAN 1998	11:34pm
3. SCLMV	Serial Claim Verification	26 JAN 1998	11:34pm
4. SDATE	NEXT EXPECTED calendar update	23 JAN 1998	10:19am
Options:			
? Help	# line	Print	Forward Backward Search jump Exit

Next Production Date and time

On the screen, the date and time shown to the right of each code description are for the job's next scheduled production run. The time and date are set in fields 6 and 7 of the PRODUCTION CODES detail screen (this screen is discussed under the next heading).

If a job is scheduled to start before the previous job has been completed, the background processor will wait until the first job is completed and then start the new job. If two or more jobs have the same scheduled start time, the processor will begin them in alphabetical order using the code name.

The background processor runs the production job if the Next Production Date is set to blank in the Production Code. If the Next Production Date is set but the Production Period is blank, the background processor runs the job once and then sets the Next Production Date to blank.

The library **cannot** add or delete Production Codes.

Detail Screen

This sample detail screen shows the production code SCC.

```
                                SERIALS CONTROL PRODUCTION CODES

PRODUCTION CODES TABLE : SCC
-----
1. Description                  : Autogeneration of Claims/Missing Issues
2. Production Charge           :
3. Production Period           : M
   (U=Minutes, D=Daily
   W=Weekly, M=Monthly)
4. Length of period            : 1
5. Period detail (Time,Day,Week):
6. Next Production Date       : 05 MAR 1998
7. Next Production Time       : 01:45 AM
8. Automatically Output (1 = Yes:
9. System Printer #           : 0
10. Default Contact Method    :
11. Output Header             :
12. Comment Line #1           :
13.      Line #2              :
14. # Days to Retain reports  :
Options:
  ? help  # line  Line by line  Copy  Print  Exit
```

Next Production Date and Time

The *Production Period* and *Length of period*, fields 3 and 4 of the detail screen, define the length of time between the automatic startups of a processing job. The *Production Period* field can be left blank to prevent the system from automatically calculating and setting the *Next Production Date* and *Time* (fields 6 and 7), which tell the system when to start the job next.

Fields

<i>Production Code</i>	[1-5 character code]
<i>1. Description</i>	[1-32 characters] Brief description of the Production Code.
<i>2. Production Charge</i>	[empty] Do NOT use this field. In the Circulation Production Codes, this field is used for a Production Charge Code (<i>Circulation Management Guide:Output Production</i> chapter).
<i>3. Production Period</i>	[U,D,W,M] U Period is specified in minutes. (This value is rarely used.) D Period is specified in days. W Period is specified in weeks. M Period is specified in months.
<i>4. Length of period</i>	[digits] The length of time between automatic production startups, in units specified by the preceding field — that is, the number of minutes, days, weeks, or months.
<i>5. Period detail</i>	[time, day, week] The preceding two fields determine the period but not the time and date within the period. <ul style="list-style-type: none"> For a month-based period, you can specify a time, day, and week in this field. For example: <p style="text-align: center;">21:00, 1, 3</p> means 9:00 PM on the 1st day (Monday) of the 3rd week of the month. For a week-based period, you can specify a time and day in this field. For example:

21:00,1

means 9:00 PM on the 1st day of the week (Monday).

- For a day-based period, you can specify a time in this field. For example:

21:00

means 9:00 PM.

- NOTE: For a minute-based period, do not use this field. Enter the time in 24-hour format. Examples:

21:30 03:00

If an operator runs a job off-schedule — by modifying the system-calculated date and time in the fields 6 and 7 or by running the job interactively (option 2 at the SERIALS CONTROL CALENDAR PROCESSOR menu) — the system will use the value in this field to reset the schedule. Note, however, that the system does not reset the schedule for the Claim Letter Printing (CLMP) job if it is run on the CLAIMS MENU.

empty The system will calculate the next date and time based on the previous ones. For example, if a week-based job was last started at 9:00 PM on the 5th day of the week, then the system schedules the next run at 9:00 PM on the 5th day of one of the following weeks. It does not matter why the job was last started at that date and time.

The system does not reset the schedule after a job has been run off-schedule due to operator intervention.

6. Next Production Date [day, month, year (in system format)]

The next date that the background processor will start this job. For example:

20 APR 1998 or 03-20-1998

The date shown here is calculated by the system based on the cycle defined by the previous fields in the table. If required, an operator can override the default date by editing this field.

The year can be omitted from the date — the system will assume the current year.

7. *Next Production Time* [time (24-hour format)]
- The next time that the background processor will start this job. The time shown here was calculated by the system based on the cycle defined by the previous fields in the table. If required, an operator can override the default time by editing this field. When entering a time, do not enter AM or PM. You do not have to enter the colon either. For example, if you enter:
- 2130
- the system will display 09:30PM after you use <ENTER>.
8. *Automatically Output* [0-1 as defined below]
- 1 Save the production output in a file and send it to a print queue as well.
- 0 or empty Just save the output in a file. An operator can send this output to a print queue later by selecting option 3 at the SERIALS CONTROL CALENDAR PROCESSOR menu. CAUTION: Remember to print the output before the next run of the same process. The output file can contain output from only a single production run; output from the new run overwrites output from the previous run. Print the production output before the next production run — each run overwrites old output with new output.
9. *System Printer #* [digits]
- The system will send output to the print queue identified by this number. An operator can override this default when selecting option 3 at the SERIALS CONTROL CALENDAR PROCESSOR menu to print output that the system does not print automatically (see the preceding field).
10. *Default Contact Method* [empty]
- Do **not** use this field. In the Circulation Production Codes, this field is used for a Notice Method Code (see the *Circulation Management Guide: Output Production* chapter).
11. *Output Header* [any]
- The system displays this text at the top of the PRODUCTION OPTIONS screen (shown for interactive output printing). Currently, the system does not use the text in the output (at the top of each page).

12. *Comment Line #1 to* [any]

13. *Comment Line #2*

Comments about the job. The system does not use this text — it is just additional information for staff who read the detailed screen.

14. *# Days to Retain reports*

[1-99]

If the *# Days to Retain reports* field is set to 0 or empty, the calendar job will overwrite previously generated reports every time it runs. If set to 1, the system retains reports created on the current date only. If set to 8, the system retains reports for the current date as well as seven days prior to the current date.

CAUTION: The system administrator must ensure that sufficient spare disk capacity exists on the system if reports are to be kept for longer periods of time.

Processing Jobs

The preceding sections describe how to set up and activate the processing jobs; the following sections describe what the jobs do, when they should be run, which records they select for processing, and what kind of reports they generate. The jobs are described under the headings:

- Autogeneration of Claims/Missing Issues
- Serial Claim Print
- Serial Claim Verification
- Next expected calendar update

Autogeneration of Claims/Missing Issues (SCC)

Scheduling Execute this job as often as claims need to be generated, perhaps weekly.

Effect This job will automatically find serial items that should have claims against them. Specifically, the system will:

1. Look for *NEXT EXPECTED* items that have surpassed their expected date and reached their *CLAIM DELAY* date. If autogeneration is:
 - On
Then a claim letter is produced and the system calculates the new next expected date (and issue).
 - Off
Then the item goes on the Claim Verification list, in the *Items to be claimed* area.
2. Look for existing claims that are still active after their *ACTION DATE*. When this occurs, it indicates that the system should reissue this claim.
 - If the action is to claim again and autogeneration is:
 - On
Then the claim is reprinted.
 - Off
Then the item goes to the Claim Verification list, in the *Items to be claimed* area.
 - If the action is to mark as missing and autogeneration is:
 - On
Then the claim is inactivated and the item is assigned the status of *MISSING*.
 - Off
Then the item goes to the Claim Verification list, in the *Items to be marked as missing* area.
3. Look for items with the status of *item due*, that have reached their due date and claim delay. When such items are found and autogeneration is:

- On
Then a claim letter is produced.
- Off
Then the item goes to the Claim Verification list, in the *Items to be claimed* area.

Selection

This job automatically tracks and selects serial items based on counters and dates. The relevant information is contained in the *TIMES CLAIMED*, *NEXT EXPECTED*, and *ACTION DATE* fields, shown on the Claim Transaction Display and other screens. The *TIMES CLAIMED* field shows the number of times a claim has been generated for the item. The *NEXT EXPECTED* date, and default *ACTION DATE*, are assigned by the system based on the copy set's Claim Code.

In particular, the job selects a serial item for claiming if either of the conditions are met:

- the *TIMES CLAIMED* value is 0 and the *NEXT EXPECTED* date is on or before the current date
- the *TIMES CLAIMED* value is 1 or greater and the *ACTION DATE* is on or before the current date.

The system skips items that are part of an 'inactive copy set'.

Report

The report format is wide (132 column).

Vendor Update Report — this is a list of the serial titles with vendor changes.

The Autogeneration of Claims/Missing Issues processing job (SCC) also processes vendor changes made to serial orders by Acquisitions staff. This feature accommodates libraries which occasionally change vendors when renewing subscriptions.

The job changes the copy set Vendor Code for a serial on the date that was specified by Acquisitions staff when they changed the order's vendor. Until the copy set vendor is changed in Serials, new claims continue to be issued to the old vendor — these are presumably claims on the old subscription. The job updates a copy set only if it was originally created by the system from an Acquisitions order.

On this same date, the job also “reissues” outstanding (old vendor) claims for the copy set (updated by Acquisitions staff) to the new

vendor, by changing the *VENDOR* in each claim. When Serials Control staff change a vendor code on the COPY SET EDIT screen they are asked whether “existing claims should be reissued to the new vendor”. If the answer is 'Y', the SCC job reissues outstanding claims for the updated copy set, to the new vendor.

The job produces a report which describes any vendor changes made.

Serial Claim Print (SCLMP)

Scheduling	Execute this job after the Autogeneration of Claims/Missing Issues job (SCC), and just as frequently.
Effect	The job clears all claim transaction references from the Print List and sets each transaction's status to <code>Printed</code> . The job then prints out the claim list on your system printer.
Selection	<p>This job uses all the serial item claim transactions referenced in the internal Claim Print List. There are two ways claims could have been added to this list:</p> <ul style="list-style-type: none">• by the autogeneration of Claims/Missing issues• by one of your staff creating or updating a claim transaction at a Serials Control screen.
Report	<p>The report format is narrow (80 column).</p> <p>The claim letters are printed, one per page, in a sequence based on:</p> <ol style="list-style-type: none">1. Vendor2. Claim Print List sequence. <p>The letter includes a line of text defined by your Library for the Claim Message Code. The text is specified in the <i>MESSAGE</i> field of the CLAIM DETAILED DISPLAY screen.</p>

Serial Claim Verification (SCLMV)

Scheduling	Execute this job after the Autogeneration of Claims/Missing Issues job (SCC), and just as frequently.
Effect	The job clears claim references from the Verification List when finished.
Selection	This job uses all the serial item claim references that the Claim Generation job has added to the internal Claim Verification List. This job will function only if automatic claim generation is off .
Report	Affects two areas of a report: <ul style="list-style-type: none">• Items to be claimed• Items to be marked as <code>missing</code>

Next Expected Calendar Update (SDATE)

Scheduling	Execute this job daily, before the Autogeneration of Claims/Missing Issues job (SCC).
Effect	<p>The Next Expected Calendar Update processing job updates a Calendar tree with effective dates. An effective date is the date on which a specific action should occur to a specific record (or set of records) in the database. Effective dates are created by the occurrences:</p> <ol style="list-style-type: none">1. Entering a new <i>NEXT EXPECTED</i> date at the CHECKIN SCREEN in Serials Control. Effective date: next expected date. Action : issue a claim2. Creating an <i>ITEM DUE</i> issue at the CHECKIN SCREEN in Serials Control. Effective date: date on checkin item Action : issue a claim3. Creating or updating a claim in Serials Control. Effective date: action date on claim Action : reprint the claim4. Updating a vendor on an order (in Acquisitions) that is checked in through Serials Control. Effective date: specified by Acquisitions staff Action : update vendor on Copy Set records.5. Asking the system to reissue outstanding serial claims to the new vendor when the vendor code is changed on a serial copy set in HLDM. Effective date: specified by staff. Action: on outstanding claims, change the vendor code and then reissue claims to the new vendor. <p>The first three occurrences have actions dealing with claiming. If the situation that prompted the occurrence is still true on the effective date, a claim should either be reprinted or created (i.e., if the next expected date</p>

for an issue goes by and the issue is still not received, the issue should be claimed). The last two occurrences deal with vendor changes and reissuing claims to new vendors once a vendor change has been made. If the vendor update was made by acquisitions staff, the vendor code on copy set records is updated on the effective date.

Once an effective date (and its associated record and action) has been added to the Calendar tree, the autogeneration of Claims/Missing issues processing job can scan the Calendar tree for past dates and determine which claims to create, claims to reprint, vendors to change and claims to reissue to a new vendor. Scanning the Calendar tree is much faster than scanning each of the records in the Serials database.

Report

None.

7

Claims

The system can send claim letters to vendors for late or damaged copies of serials.

This chapter describes the Claims Function of the ADVANCE Serials Control Module:

- accessing the function
- the SERIALS CONTROL CLAIMS MENU
- displaying the claim letter list and deleting letters from it: SERIALS CLAIM REVIEW
- printing claim letters for a vendor: PRINTING CLAIM LETTERS.

For an overview of Serials claiming, see the Serials User's Guide: *Claims* section.

For instructions on creating and updating claims, see the *Serials User's Guide: Checkin*

Accessing the Claims Menu

Access the SERIALS CONTROL CLAIMS MENU by selecting 3 on the SERIALS CONTROL MAIN MENU, or by entering the screen identifier (CLMM) on any Serials menu.

The SERIALS CONTROL CLAIMS MENU offers access to both claims subfunctions but, depending on the permissions assigned to your logon ID, your menu might not offer you access to all of them.

```
DD MM YYYY          Geac - Library Division - ADVANCE (##.##)          PPP IIIIII
HH:MM                Your Library Name

SERIALS CONTROL CLAIMS MENU (CLMM)

1. CLMR  Claims Review
2. CLMP  Claims Printing

Enter the number of your selection and press <ENTER>
or ? followed by <ENTER> for Help.
Press <ENTER> to return to previous level :
```

Claims Menu Items

The items available on the SERIALS CONTROL CLAIMS MENU are:

- <ENTER> Returns to the SERIALS CONTROL MAIN MENU or other screen on which you entered the CLMM screen identifier.
- 1. CLMR Enter 1 or CLMR to access the SERIALS CLAIM REVIEW screen. There, you can examine the Serials Claim Review List and delete particular claim letters.
- 2. CLMP Enter 2 or CLMP to access the PRINTING CLAIM LETTERS screen. There, you can print claim letters, for a selected vendor or for all vendors.

Claims Review

Access the SERIALS CLAIM REVIEW screen either by selecting 1 on the SERIALS CONTROL CLAIMS MENU or by entering the screen identifier (CLMR) on any Serials menu.

The screen shows the Serials Claim Review List — a list of the claim letters generated by staff or, if the library has claim autogeneration activated, by the Serials Claim and Missing Issues Generation processing job. These are the letters that will next be printed by the Serials Claim Letter Print job or the PRINTING CLAIM LETTERS screen.

Claims that have been inactivated (because the library has since received the item) or are already printed do not appear on this list.

CLMM - SERIALS CLAIM REVIEW					ID.CODE
VENDOR	TITLE	CAMPUS	COPY#	TIMES CLAIMED	
1. FAXON	Journal of Mountain Climatology Vol.120 No.6 / 1998 OCT	NORTH	4	1	LAST PRINTED: 10/24/98
2. FAXON	Wooden Wagon Weekly Vol.7 No.10 Pt.3 / 1998 16 OCT	NORTH	1	1	LAST PRINTED: 10/25/98
3. FAXON	Now and Then Digest Vol.111 No.2	CENTRL	1	2	LAST PRINTED: 10/23/98
4. FAXON	Wooden Wagon Weekly Vol.7 No.10 Pt.1 / 1998 2 OCT	NORTH	1	2	LAST PRINTED: 10/25/98
5. FAXON	Rock Design International Vol.33 No.8 Pt.B / 1998 OCT	CENTRL	2	1	LAST PRINTED: 10/20/98
6. UNIVP	Fish News Vol.33 No.16 / 08/07/98	SOUTH	1	4	LAST PRINTED: 10/24/98
7. UNIVP	Modern Art Vol.1 No.10 / 1998 OCT	CENTRL	1	1	LAST PRINTED: 10/21/98
Options:					
Delete #	Forward	Backward	? Help	Exit	

Use the *Delete #* option to remove selected claim letters from this list, so that they will not be printed. The system sets the claim's *ACTIVE* status to *N* (so that the Serials Claim Generation job will ignore the claim from now on), but does not change back the *LAST CLAIM* date, *TIMES CLAIMED*, and *ACTION DATE* fields. When the letters for this claim's vendor are printed (by the Claim Print job or via the PRINTING CLAIM LETTERS screen), the system sets the claim's status to ***Printed***

even though it is not actually printed; this will allow staff to “reprint” the claim later.

Exit returns you to the SERIALS CONTROL CLAIMS MENU or other screen on which you entered the CLMR screen identifier.

CAUTION: *Exit* does not undo any deletions you make here. All the deletions you make are permanent.

Printing Claim Letters

Access the PRINTING CLAIM LETTERS screen either by selecting 2 on the SERIALS CONTROL CLAIMS MENU or by entering the screen identifier (CLMP) on any Serials menu.

There are two ways to print claim letters out of the Serials Claim Review List:

- run the Serial Claim Print job (SCLMP)
- access this screen and <ENTER>.

If you want letters for one particular vendor printed, enter the Vendor Code before <ENTER>.

To leave this screen **without** printing some claim letters, enter a period (“.”) and <ENTER>.

```
PRINTING CLAIM LETTERS                                MASTER

Enter vendor code to print or [ALL] : <default = ALL >
```

Printing claim letters here actually only sends them to the print hold files. To print them at the printer, you then need to select item 3 (Send Outputs to Printer) on the SERIALS CONTROL CALENDAR PROCESSOR (screen identifier SCP), and then select the Claim Print job (SCLMP).

A

Using ADVANCE

This appendix provides some general instructions on how to use ADVANCE:

- the parts of a screen
- selecting menu items
- selecting screen options
- editing in data fields
- editing in data field windows.

The Parts of a Screen

The ADVANCE screens follow a common design, as illustrated in the following sample menu — the ADVANCE MASTER MENU.

Menu Screens

Each menu screen typically has:

- the **software name** (Geac ADVANCE Library System) and **release number** (RRRR, e.g. 5.00), and your **library system name** (Your Library Name), at the top centre of the screen
- the **date** (DD MMM YYYY) and **time** (HH:MM), in the top left corner of the screen
- the terminal's **Port Code** (PPPPPP) and default **Institution Code** (IIIIII), in the top right corner of the screen
- a **screen title** (e.g. MASTER MENU), four lines down in the centre of the screen
- an **information display** or **work area**, in the middle of the screen
- an **options area** for entering a menu option, at the very bottom of the screen.

```
DD MMM YYYY          Geac ADVANCE Library System (RRRR)          PPPPPP  IIIIII
HH:MM
                                Your Library Name

                                MASTER MENU

1. CAT  Cataloguing          4. ACQ  Acquisitions
2. CIRC Circulation          5. SER  Serials Control
3. OPAC Online Catalogue    6. UTIL Utilities
                                7. ON   Change User
                                8. OFF  Log Off

Enter the number of your selection and press <ENTER>
or ? followed by <ENTER> for Help :
```

Non-Menu Screens

Most non-menu screens lack the information shown in the top three lines of menu screens, and list the options across the bottom of the screen. A sample ordering screen from Acquisitions is shown below.

The operator's **User ID** (UUUUUU) is shown in the top right corner of many screens.

```

                                ORD - ORDERING DATA                                UUUUUU
PO#/LINE#: 9200000314/0001      VENDOR   : PENGUIN      ORDER DATE: 02/08/93
REQUEST #: 920123                ORDER TYPE: REGULAR  REQST DATE: 02/08/93
LIBRARY  : UL                    CONDITION : OPEN    EST DELVRY: 02/22/93
ISBN/ISSN: 0898598125          LC CARD # : 85029331 RECEIVED  :
AUTHOR   : Buss, Arnold H., 1924-
TITLE    : SOCIAL BEHAVIOR AND PERSONALITY.

STATUS   : Rush Order

1. VENDOR   : PENGUIN      6. SELECTOR : ACQ          10. UNIT COST:      46.50
2. PAY TYPE : PAY          7. TOTAL CPY: 6          11. DISCOUNT%: 15.000
3. TRANSFER : Y            8. PRIORITY : RUSH      12. TAX %       : 8.000
4. CLM CODE : DFLT        9. CURRENCY : CDN       13. ADDED CHG:   0.00
5. REQUESTOR: C. Smith    14. CONDITION: OPEN
15. VENDOR  : Please supply ASAP
    NOTE    :

Options:      Description of selected option
File # line  Line by line  Bibliographic  Allocation  Notes  Status
Conditions  Serial Publication  Vendor inquiry  Prior screen  ? Help
Exit

```

Selecting Menu Items

The ADVANCE modules are menu-driven. Menu screens which list available sub-menus or functions are offered at the highest levels of the module. There are two ways to select a menu item.

Menu Item Number

To select a menu item, you may enter the item's reference number on the menu and <ENTER>. For example, to select the Serials Module on the ADVANCE MAIN MENU, enter the number 5 and <ENTER>; similarly, to select the Vendor Maintenance Menu on the SERIALS CONTROL MAIN MENU, enter the number 4 and <ENTER>.

Screen Identifiers

Each menu item also has a short alphabetic name, called a screen identifier. For example, the Publications Pattern Function, an item listed on the SERIALS CONTROL MAIN MENU, has the identifier PUBM. You can enter the identifier instead of the menu item number on this menu.

Furthermore, you do not have to be on the menu that lists the function when you enter the screen identifier — you can enter the screen identifiers on any menu in the module to go **directly** to the screen you want, skipping any intermediate menus.

Selecting Screen Options

Many non-menu screens have a list of options at the bottom. The way these options are presented depends on whether or not the “option bar” feature is turned on for your particular ADVANCE module (e.g. Serials) or your terminal’s port. (This feature is controlled by the system administrator at a setup table — see the *Utilities Management Guide*.)

All sample screens in this guide show option lines with this feature turned on.

Option Bar

If the “option bar” feature is turned **on**, the option line will look something like the following, with one of the options highlighted and a brief description of it shown on the first line.

```
Options:   Get more information
Check in  Holdings  Claims  Order detail  Forward  Backward
Prior screen  ? help  Exit
```

To select an option:

1. move the highlighted bar in any of three ways:
 - press an arrow key
 - press the space bar
 - type the first (capitalized) letter of the option. If more than one option begins with the same letter, type the letter a second time to proceed to the second option.
2. and then <ENTER> to execute it.

Option Code

If the “option bar” feature is turned **off**, the option line will look something like the following, with a code (or “command”) shown to the left of each option.

```
Options:                                     <ENTER> = scroll options
C = Check in   H = Holdings   CL= Claims       O = Order detail
F = Forward    B = Backward  P = Prior screen  ? = ? help
```

To select and execute an option, enter the option’s code and <ENTER>. For example, enter CL and <ENTER> for *Claims*.

Scrolling If the system does not have enough room to list all options at once, you can <ENTER> to scroll forward in the list. For example, the previous sample display will change to:

```
Options:                                     <ENTER> = scroll options
F = Forward    B = Backward    P = Prior screen    ? = ? help
E = Exit
```

and then to:

```
Options:                                     <ENTER> = scroll options
E = Exit
C = Check in    H = Holdings    CL= Claims          O = Order detail
```

and then finally back to the original display.

Editing in Data Fields

Many screens have fields into which you can place the cursor to add or change data. These fields are usually the numbered fields.

Single-field Access

To access a particular field, select the *# line* option and type the field's reference number. Afterward, you can leave the field and return to the option line by <ENTER>.

Line-by-Line, Multi-field Access

To access all the screen's fields, one after another, instead select the *Line by line* option; this places the cursor in the screen's first field. <ENTER> takes you to the next field rather than down to the option line.

When you add a **new** record, the system displays a screen with most or all of the fields left blank and automatically puts you into line-by-line entry mode.

Commands

The commands you can use to edit text or display help within a field are described in the following table.

Use the Back Space key and type over existing text, or use the <ESC> commands, when necessary. Be careful about using **arrow keys** for this purpose because they work differently on different types of terminals.

NOTE: The library might have different commands defined for some functions, such as <ESC>OO rather than <ESC>O for the insert/over-type mode toggle. If necessary, ask your system manager or Geac Customer Support, who can check the ADV.DEFINE.CURSORS file.

Enter	Description
<ENTER>	To leave the current field as is and proceed , just <ENTER>. In line-by-line mode, the system places the cursor at the next field; otherwise, it places the cursor down at the option line.
(blank)	To leave the current field as is and send the cursor down to the option line , even in line-by-line mode, enter a blank at the beginning of the field and <ENTER>.
.	To leave the current field as is and go back one field, type a period at the beginning of the field and <ENTER>. In line-by-line mode, the system places the cursor back at the preceding field; otherwise, it places the cursor down at the option line.
#	To clear the current field and proceed, type a number sign at the beginning of the field and <ENTER>. In line-by-line mode, the system places the cursor at the next field; otherwise, it places the cursor down at the option line.
?	For library-defined help on the field, type a single question mark at the beginning of the field and <ENTER>.
??	<p>At fields which take a setup code as the value, you can have the system display the list of valid codes. Type two question marks at the beginning of the field and <ENTER>.</p> <p>For example, typing ?? in the <i>CHRONOLOGY CODE</i> field of the PUBM - PUBLICATION PATTERN screen causes the system to superimpose the CHRONOLOGY CODE - (CHRN) table. If you wish, you can assign one of the listed Chronology Codes to the field by entering the code's reference number at this table before returning to the original screen.</p>
<ESC>A	ErAse character under the cursor (the cursor moves to the left).
<ESC>B	Tab Backwards within the field.
<ESC>D	Delete character under the cursor (the cursor does not move).
<ESC>H	Go to the beginning of the field (Home).
<ESC>I	Insert (paste) text from your preceding deletion/capture in the field.
<ESC>L	Go to the end of the field.
<ESC>O	Toggle between insert and Overtyp modes.

Enter	Description
<ESC>P	For some fields, the system can only show the first line of information stored in the field. (If there is more text than can be shown, the system displays a plus sign, +, at the end of the line.) If the system does not automatically display and allow you to edit this text when you access the field, use this command to open an edit window . See the next section for a list of window editing commands.
<ESC>Q	Delete (and capture) text to the beginning of the field.
<ESC>R	Restore the field (undo changes).
<ESC>Z	Delete (and capture) text to the end of the field.

<ESC> Commands

1. Press the keys one after another rather than together. To use “<ESC>E”, for example, press the Escape key, release it, and then press the “E” key.
2. Enter characters in upper or lower case, as you wish. For example, <ESC>h is equivalent to <ESC>H.

For convenience, some libraries have set up **function keys** to take the place of the commands listed in the table.

Editing in Windows

The following table lists the commands required for editing text within a field window. A window is a temporary workspace for a field in which you may enter or edit several lines or “pages” of data and use some special editing commands. You may also use the arrow, Tab, and Back Space keys as usual.

NOTE: The library might have different commands defined for some functions, such as <ESC>OO rather than <ESC>O for the insert/over-type mode toggle..

Enter	Description
<ESC>A	erAse character under the cursor (the cursor moves to the left)
<ESC>B	tab Backwards
<ESC>D	Delete character under the cursor (the cursor does not move)
<ESC>E	Exit from the window (and save changes)
<ESC>F	reFormat the contents of the window
<ESC>H	go to the beginning of the line (Home)
<ESC>I	Insert (paste) text from your preceding deletion/capture
<ESC>L	go to the end of the Line
<ESC>M	go to the bottoM of the window
<ESC>O	toggle between insert and OvertypE modes
<ESC>P	go to the next Page; oPen a window
<ESC>Q	delete (and capture) text to the beginning of the line
<ESC>R	Restore the line (undo changes)
<ESC>S	Split the line into two lines
<ESC>T	go to the Top of the window
<ESC>U	go Up to the previous page
<ESC>Z	delete (and capture) text to the end of the line

<ESC> Commands

1. Press the keys one after another rather than together. To use “<ESC>E”, for example, press the Escape key, release it, and then press the “E” key.
2. Enter characters in upper or lower case, as you wish. For example, <ESC>h is equivalent to <ESC>H.

For convenience, some libraries set up **function keys** to take the place of the commands listed in the table.

B

Glossary

This glossary explains many of the terms you may encounter in the documentation or while performing system activities.

Words shown in *italics* are defined elsewhere in the glossary.

A

- AACR2 Anglo-American Cataloguing Rules, version 2. These are the rules that form the “bible” of cataloguing procedure as they relate to the construction of catalogues and other lists.
- access level A number between 0 and 99. The higher the number, the more you are allowed to do. See also *priority level*.
- access point An entry point into a catalogue. A heading by which a bibliographic record may be retrieved.
- accession number A number assigned by the library to an individual *bibliographic item* when it is added to the library’s collection. In ADVANCE, the accession number is usually replaced by assigning a *barcode* to the item. Barcodes themselves may constitute a form of accession number, if they are sequential.
- account Accounts are used within the PICK system software. ADVANCE is an account in SYSPROG.
- accounts receivable The Circulation process by which patron fines are paid, created, or assessed and other financial transactions are performed.
- Acquisitions module The ADVANCE module used to order and keep track of the purchase of items for a library, both serials and monographs.

added entry	An entry, other than a subject entry and additional to the main entry, under which a bibliographical entity is represented in a catalogue.
ALA character set	An extended 8-bit ASCII character set defined for MARC records and adopted by the American Library Association. Of the 256 characters allowed for by this code, US/MARC defines 208.
application	A software program or set of programs that uses the computer as a tool, as opposed to the software necessary to run the computer.
archive tape	Tape from a <i>bibliographic utility</i> (<i>OCLC</i> , <i>WLN</i> , <i>RLIN</i> , or <i>UTLAS</i>) which are released to each library and contain a copy of that library's records from the utility's database. Tapes are produced regularly.
ASCII	An acronym for "American Standard Code for Information Interchange". A standard 7-bit code representing up to 128 characters. The ASCII code is used in computer communications.
attach	To connect a job or terminal to the computer in such a way that they can communicate. Also, to define communications characteristics for a terminal.
authoritative form	The form of a heading that has been chosen as the standard form to be used in all bibliographic records.
authority control	<p>A way of handling and standardizing bibliographic information using "see" and "see also" references.</p> <p>The classic example of a "see reference" is Mark Twain vs. Samuel Clemens. The library decides which of these names for the same author will be the "established" form — say, Mark Twain. If users look for "Clemens, Samuel", they will find the reference, "see Twain, Mark".</p> <p>"See also references" are generally used in subject searches. A user who looked under the subject of "Home" might find "see also Family".</p> <p>Authority control refers to the sum of the library's cataloguing decisions as to which bibliographic elements will be established form headings, rejected form headings, and related headings.</p>
authority file	Records of the correct forms of names, series, or subjects used in the catalogue. The purpose of the authority file is to keep entries uniform.
authority hot key	The function key a user can press to browse and retrieve an authority heading for the MARC field they are cataloguing.

B

- backup** An exact copy of a primary unit that can be used in place of the primary unit in case the primary unit fails. Usually 'backup' refers to copies of ADVANCE software and the library's data files which are kept on tape. If the disk versions of these files get damaged, the files can be restored from the backup versions on tape.
- barcode** A series of printed lines and spaces representing numbers, letters, or other symbols. Barcodes are not eye readable. The format of the barcode varies from one manufacturer to another. Geac equipment can work with several barcode formats, including 'CODABAR' and Code 39.
- barcode reader** A device for reading barcode labels into a system. Generic term for 'laser scanner' or 'lightpen'.
- batch** A collection of commands and input held in an editor file. Similar to a program, but relatively simple. Batches feed instructions to the computer without requiring the presence of an operator. When you execute a batch, it usually performs several control console commands and may run several programs in a pre-assigned order.
- baud rate** Also simply "baud". A standard unit, in bits per second, used to express the data transmission capability of lines, terminals, and interface equipment.
- bibliographic item** A document or set of documents in any physical form, published, issued, or treated as an entity, and as such forming the basis for a single bibliographic description. Contrast with *physical volume* and *copy*.
- bibliographic record** In ADVANCE, the MARC format record that describes one bibliographic item. For example, if the library owns 10 copies of a three-volume edition of "War and Peace", it will describe them in one Bibliographic Record with 30 items or pieces in the Item File — 10 for each of the separate volumes.
- bibliographic utility** An online processing centre whose services are based on a machine-readable database of catalogue records. The main North American utilities are *OCLC*, *WLN*, *UTLAS*, and *RLIN*.
- binding entry** An entry in a bibliographic record to indicate that an item is physically bound with one or more other items. Used with books bound together, AV kits, etc.

- bit A binary digit. A data field that has only two possible values, 0 or 1 — that is: NO or YES; OFF or ON.
- blind heading This is an authorized heading for which no authors or subjects exist in the bibliographic database. In general, blind headings do not appear in the Online Catalogue. Note, however, that blind, non-provisional, topical subject headings do appear in the Online Catalogue. All blind headings can be searched for in the Cataloguing module.
- blind reference This is a reference to an authorized heading that does not exist in the bibliographic database. In general, blind references do not appear in the Online Catalogue. Note, however, that references to blind, non-provisional, topical subject headings do appear in the Online Catalogue.
- Boolean searching A searching technique in which search terms are presented to the system in a particular manner. These terms are operated on with Boolean logic, which means the search terms may be separated by the operators AND, OR, NOT. For example, consider the subject search: COMPUTERS AND CARS. This search would result in the retrieval of a series of items in which both COMPUTERS and CARS formed a subject term.
- boot Short for “boot strap”. The operation of loading the initial elements of the ‘operating system’ into computer memory.
- borrower Known as *patron*.
- BOT Reflective marker to identify the beginning of a tape.
- bug An error in a program or hardware function that causes the function to work incorrectly.
- byte A character of data, normally represented by 8 bits.

C

- call number Alphanumeric code used to identify and locate a particular item on the shelves. Call numbers usually consist of a classification number and author or cutter number; they may also include an accession number. In most systems, the call number also classifies the subject material of the book. Various systems exist - common ones are *LC* and *Dewey*.
- CAN/MARC Canadian version of the MARC format.

carriage return	Indicates the use of the ENTER or RETURN key on the keyboard. Operators use this key to send data to the computer, or to respond to a prompt. Sometimes abbreviated to “<CR>”.
Cataloguing module	The ADVANCE module that automates bibliographic and authority control.
cataloguing source number	Unique number assigned by the provider of the cataloguing record: e.g. OCLC, LC.
charge	Known as <i>checkout</i> . A function in the Circulation module: the process by which a library item is lent to a patron. To loan a book to a patron is to charge it out to the patron.
checkdigit	A calculated digit added to the end of a number used to validate the correctness of the sequence of digits. Used in <i>barcodes</i> , <i>ISBNs</i> , and so on.
checkin	1) In the Circulation module, the process of checking returned items in at the circulation desk. Also known as <i>discharge</i> . 2) In the Acquisition and Serials modules, <i>checkin</i> is the process of receiving an item shipped to the library, and recording the receipt on the system.
checkout	A function in the Circulation module: the process by which a library item is lent to a patron. To loan a book to a patron is to <i>charge</i> it out to the patron.
chronology	Date that identifies an issue of a serial — e.g. “June 1991”.
Circulation module	The ADVANCE module that automates circulation functions and transactions.
citation	A display of bibliographic information describing a given work.
CODABAR	A 14-digit <i>barcode</i> format that ADVANCE uses.
COM	Acronym for “Computer Output on Microform”. Information is recorded on microfilm or microfiche instead of paper.
command	An order telling the system to start, stop, or continue an operation within a function. Commands are usually entered by typing a mnemonic code.

compile	To translate a program from a high-level source language to a machine-executable form.
content designator	The means of identifying data elements and/or of providing additional information about a data element. Content designators consist of tags, indicators, and subfield identifiers.
control characters	Keyboard letters, numbers, or symbols which are entered while the <CONTROL> key is held down. They are not normally printable characters.
control console	A terminal, usually in the computer room, from which the system may be controlled.
conversion	The process of turning machine-readable records in one format into machine-readable records of a different format.
copy	A single piece of a document; a duplicate; an instance of a serial issue. See also <i>bibliographic item</i> , <i>physical volume</i> , <i>piece</i> , and <i>copy set</i> .
copy number	A number assigned by the library to a copy. The number need not be unique. Its usual purpose is to distinguish between different copies of the same title, or different copy sets of the same serial title.
copy set	A duplicate run of issues of a serial; simplistically a “subscription”.
copy-specific hold	A hold placed on a specific copy. A copy-specific hold may be used, for example, to capture a particular copy to be sent to the bindery. Contrast with title-level hold.
core	Computer memory, usually measured in megabytes: “MB”.
CRT	Cathode Ray Tube screen of a terminal. Also known as VDU (visual display unit).
CSN	Cataloguing Source Number.
cursor	A small square or line on the terminal screen which tells you where the next character you type will appear.
cutter number	Part of the <i>call number</i> used to identify the author for filing purposes.

D

database	A pool of data held in computer storage, controlled by a central authority, and available to any application capable of accessing the storage. It is designed to meet the requirements for consistent and current data by many or all of an organization's application systems.
data communication	The transmission of data across geographically separated locations.
data element	The smallest unit of information that is explicitly identified in MARC format. Within a variable field, a data element is identified by a subfield identifier. Within the record label, the directory, and a fixed-length subfield, a data element is identified by its character positions.
date of last use	The date of the last transaction associated with a particular record.
Dewey	Dewey Decimal Classification system, developed by Melvil Dewey.
diacritics	Also "diacritic characters/marks". The marks, such as accents, which appear under or over characters, used to denote a specific sound for a given character. Sometimes used to refer to non-English alphabetic characters as well.
discharge	Known as <i>checkin</i> . A function in the Circulation module: the process by which library staff record that a borrowed item has been returned by the patron.
disk	Also "hard disk". A magnetic storage medium, like magnetic tape, but in the form of a platter, similar to a phonograph record.
disk drive	A data storage device that holds, reads from, and writes to <i>disks</i> .
diskette	Also "floppy disk". Similar to <i>disk</i> , typically used with microcomputers.
DOS	Disk Operating System, for a microcomputer.
download	The data flow from the host computer system down to the microcomputer.

E

- edit record The “edit” records are the temporary, work versions of bibliographic records, stored in the Work File. Edit records are not shown in the Online Catalogue.
- edition A new edition of a work, revision. Edition information may modify some but not all of the bibliographic information for a work. According to AACR2, a new bibliographic record must be created for a new edition.
- editor A program that enables the user to create, purge, retrieve and update variable-length record source files.
- editor file A file created using the editor.
- enumeration Numbering that identifies an issue of a serial — e.g. “Vol.3 Pt.A”.
- EOF The magnetically recorded mark at the end of a file.
- EOT The reflective marker at the end of a tape attached to the tape surface.
- established form This is the form of a heading that has been chosen as the standard form that should be used in all bibliographic records. Also known as *authoritative form*.

F

- F.E. Stands for “Field Engineer”. Also written “FE”.
- F.E.D. Also written “FED”. Field Engineering Division — the Geac department responsible for maintaining and repairing hardware.
- field 1) A MARC “field” is a defined part of a MARC record used to contain only a specific category of data. For example, included in the Bibliographic Record is the Main Entry - Personal Name Field (Tag 100), the Title Statement Field (Tag 245), and the Local Call Number Field (Tag 090). There are two kinds of MARC fields - *variable length* and *fixed length*. Some people use the word “tag” to refer to a MARC field.
- 2) An area on the screen where you can enter data, or where the system will display information: for example, author, title. Fields often appear on the screen with a descriptive word beside them. For example, the author field usually has “AUT:” or “AUTHOR” beside it.

field separator	A control character used at the end of each <i>variable field</i> to separate it from the next.
file	<p>A collection of related records treated as a unit.</p> <p>A file is a logical structure which associates a set of items. On a PICK system, files are organized in a hierarchical structure. There are four levels of files: the System Dictionary, a users' Master Dictionary, File-level Dictionaries, and the Data Files. A PICK system can contain any number of files, which can contain any number of data items, limited only by the size of the disk drive.</p>
file structure	The rules of organization that relate records within a file.
fixed-length field	Also "fixed field" and "control field". A MARC field of pre-defined length in a bibliographic record: for example, the Physical Description Field (Tag 007). Fixed-length fields are made up of one or more fixed-length data elements (sometimes called <i>offsets</i>).
fixed-length field element	Part of a MARC <i>fixed-length field</i> whose length and contents are pre-defined. For example, the language code (character positions 35 to 37) in Tag 008.
fixed-length subfield	A <i>subfield</i> whose length is invariant, being determined for all occurrences by provisions of this format. A fixed-length subfield may be defined to contain one or more data elements. Fixed-length subfields may occur in both fixed-length fields (e.g. field 100, subfield ‡a), and variable-length fields (e.g. field 200, subfield ‡z).
frame	Disk drive storage is divided into sections called "frames". Each frame is numbered, giving the system direct access to that particular frame-id or FID. The physical size of a frame is machine-dependent, and limited only by the size of the disk drive.
function	<p>In ADVANCE, "function" refers to each of the possible actions available in the main menus.</p> <p>For example, in the Circulation module, "function" refers to an operation available in the online menus: e.g. checkout.</p>
fund	The library can define amounts of money to be encumbered, spent, referred to, and reported on through named "funds" within the Acquisitions module. The term "fund" is used to contrast with external "accounts" which are not system-maintained.

G

GFE Group Format Error. A GFE typically indicates that the data may be corrupted. Normally GFEs are caused by a sudden power failure.

H

- hang Refers to the situation where the computer does not respond to terminal activity. Usually the result of some kind of fault, either in the software or the hardware.
- hold Sometimes called “reservation”. A facility in Circulation referring to the process by which an item not currently available is reserved for the patron. It is normally used when all copies are on loan. When the item becomes available, the library sets it aside for the requesting patron.
- holdings **Piece holdings:** the physical volumes that the library owns of a given work.
Copy holdings: the issues that the library owns of a serial.
Summary holdings statement: a description of the range of copy holdings.
- host The controlling or main computer in a data network.
- hot key See *authority hot key*.

I

- imprint Publisher name, including date and place of publication.
- index A list of data arranged in some order (usually alphabetical) using a special “key” (such as author, title, etc.) which acts as an access point to the database. Indexes facilitate quick access to a large body of data.
- index entry A word, phrase, or number used to locate an item within a specific index.
- index key The term or phrase from a source record which allows you to search for that record - for example, “Twilight Zone”, or “Bowie, David”.
- indicator A special data element in a MARC variable field. Each US/MARC variable field must have two one-character indicators.

intensity	The brightness of the characters on the screen.
interface	To interconnect devices or systems with different characteristics. Usually involves converting data suitable for one system into a form suitable for a second system. The term can be used as a verb or a noun. It can be applied to a cable or a connector, to a device that performs a conversion operation, or to a conceptual boundary.
interlibrary loan	The arrangement whereby a library system may borrow items from another library system. Either or both of the two libraries may be Geac customers. ILL patron privilege classes and material types should be defined in the Policy Tables.
invoice	An accounting document supplied to the library by a vendor, indicating the character, quantity, price, terms and nature of delivery of goods sold or services rendered. In the Acquisitions module, staff members will create a system record for each invoice received.
I/O	Abbreviation of “input/output”.
ISBD	“International Standard Bibliographic Description” — a format for describing bibliographic information.
ISBN	“International Standard Book Number” — an alphanumeric code (with dashes) assigned by some publishers to their works. The same work published in different countries will have different ISBNs.
ISO	Short form for “International Standards Organization”.
ISSN	International Standard Serial Number. Similar to ISBN, except for serials.
issue	A publication unit of a serial, usually identified by unique enumeration (numbering) and chronology (cover date).
item	Used variously, in different contexts, to mean <i>bibliographic item</i> , <i>physical volume</i> , <i>copy</i> , or barcoded <i>piece</i> .

J

job	Often used as a synonym for “program”. A unit of work to be done using the computer. Often accomplished through the use of a batch or program.
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journal entry In the Acquisitions module, a transaction record specifying the transfer of money into or out of one or more funds.

K

KB Short for “kilobyte” — 1024 *bytes* of memory.

keyword A word which is used as an access point to the bibliographic record. These words are taken from author, title, and subject, and individually indexed without regard to order of appearance.

L

laser scanner Device for reading barcodes or OCR labels. See also *barcode reader*.

LC Short for “Library of Congress”. It refers to the Library of the Congress of the United States, a body with some of the characteristics of a national library. Also used to refer to the classification system used by the Library of Congress.

LCSH “Library of Congress Subject Headings”. A subject classification system for cataloguing.

LC Card Number Sometimes abbreviated to “LCCN”. “Library of Congress Control Number” — the number assigned to an item by the Library of Congress production services as a printing control number / inventory number after an item has been catalogued.

LC MARC Records Records in *US/MARC* format produced by the Library of Congress.

leader The beginning portion of a MARC record. The leader contains coded information about a record, including record type, bibliographic level, and creation date. The information is stored in a fixed-length format.

library system Also called “library”, or more often, “site”. A purchaser of ADVANCE. A library system may consist of a central library, along with its branches and departments. Alternatively, a library system may be a consortium or co-operative. A library system is composed of one or more “agencies” which share the same CPU.

lightpen The pen-like device attached by a cord to the terminal. It is used to read *barcodes* into the system for operations such as registering new patrons

to the system, searching quickly and accurately for those already there, or entering a patron or item during a function such as CHECKIN, CHECKOUT, etc.

- line The transmission medium and equipment for carrying speech and/or data between separated locations, usually between host computer and remote terminal.
- line printer The printers used to print reports are often called “line printers”, so named because they print one line at a time. Printing speed for line printers is given in number of lines per minute: for example, “600 lpm”.
- linking The process of adding holdings information and (in particular) a barcode number for an item to the item’s bibliographic record.
- Also used in the Reserve Book Room to bring together specific courses with items.
- load To mount a tape on the tape drive and set it to the load point.
- load point The beginning of the usable portion of a tape. The load point occurs when the tape drive detects a one inch reflector on the tape (the *BOT* mark). A tape at load point may be used as soon as the drive goes online.
- local call number Known as *shelf location*.
- local copy number Known as *copy number*.
- log To record events and their time of occurrence.
- log on See *sign on*.
- log off See *sign off*.

M

- magnetic tape Storage medium for information. Usually used in conjunction with a computer system. Typically, the magnetic tape is 1/2 inch in width, and comes in various lengths.
- main entry In a manual cataloguing system, the primary access point for a bibliographic item. Normally the author but sometimes the title.

MARC field	A <i>fixed-length</i> or <i>variable-length field</i> in a MARC format record.
MARC format	“MACHINE Readable Cataloguing” — a standardized communications format for storing and transferring bibliographic and authority cataloguing data records on magnetic tape. A MARC record is composed of a leader, a directory to the fields, fixed length fields, and variable length files. National libraries issue records for various materials in their own versions of MARC: for example, US/MARC, CAN/MARC, UK/MARC.
material type	A category of library materials used in the library. For example, newspapers, adult fiction paperbacks, and video cassettes could all have different material types. The library usually categorizes its materials based on its circulation policies (such as loan period) and the statistical reports desired. Every item is assigned a material type. A two-character code identified by MARC.
master record	Completed bibliographic records, stored in the main bibliographic file, or the main record for binding entry records.
MD or M/DICT	“Master Dictionary” — each user account on the system has a Master Dictionary associated with it. It is structurally similar to all other files on the system. Many things that a user enters at the TCL prompt are contained in the user’s Master Dictionary: verbs, procs, connectives, file-names, etc.
menu	A listing of the functions available online that allows a user to choose and perform a variety of actions. The user selects the action by entering certain key(s).
module	An “application” package within the ADVANCE System — examples: the Circulation module, the Cataloguing module.
monograph	Book; contrast with <i>serial</i> .

N

non-filing	Words or characters that do not affect sorting. For example, The Joy of Cooking is filed under “J” for “Joy”, not “T” for “The”. “The” is a non-filing word.
non-filing count	A specific number of characters which will be ignored for sorting purposes. Usually applied to the title of a work, and usually counted from the first character in the title. For example, The Joy of Cooking ,

filed under “J” for “Joy”, would have a non-filing count of “4” (the three characters in “The” plus one space). This count is normally placed in one of the indicators of a MARC record.

normalization To improve the matching and filing of index entries, several “normalization rules” are applied automatically. For example, all letters may be converted to upper case, and some punctuation marks can be converted to blanks or stripped.

note A type of field or screen display where library staff can enter free text about a patron or item.

notice In ADVANCE, “notice” generally refers to an item printed by the library, but meant to be circulated outside the library, such as a fine notice, overdue notice, or claim notice (in Acquisitions).

O

OCLC A bibliographic utility, formerly “Ohio College Library Center”, now “Online Computer Library Center”. Among other services, it provides a machine-readable database for cataloguing.

OCR Optical Character Recognition or Reader.

offline Opposite of *online*.

offset Another term for fixed-field data elements.

online “Online” has two meanings:

1. Connected directly to and interacting with a computer.
2. A major program used to make computer interaction easier: for example, the Circulation online.

Online Catalogue One of the ADVANCE modules, the Online Catalogue is an online query system that automates manual catalogue systems for lookup only. It allows library patrons to search the MARC records database. Patrons can examine bibliographic records, locating items through standard indexes such as subject, title, author, series, keywords, and bibliographic identification numbers.

OPAC Short for “Online Public Access Catalogue”. The ADVANCE OPAC is known as the “Online Catalogue”.

operating system	Often referred to as “OS”. The set of programs that control the computer and its processing.
operator	The person using a terminal.
order	See <i>purchase order</i> .
OS	Short form for <i>operating system</i> .
OSI	Stands for “Open System Interconnect.” An international standard developed by <i>ISO</i> and used for communication between different types of computers. The OSI model defines 7 levels for the interconnect.

P

parity	A system of detecting errors in data transmissions and transfers. By selectively adding a single bit to bit patterns, parity causes the bit patterns to have either an odd number of bits turned On (odd parity), or an even number of bits turned On (even parity).
parity error	Parity errors occur when the bit patterns caused by the system’s ‘parity’ setting are incorrect: for example, when the system detects a “0” but expected a “1”. Parity errors imply that one portion of the system has detected a non-recoverable failure by another part of the system.
password	A code which is typed by an operator to sign on to the system or to a module. The password determines the operator’s <i>access level</i> .
password security	The type of security in which staff passwords are used. The password indicates the operator’s access level which, in turn, determines the commands he or she is permitted to use.
patron	Refers to the individuals who use the goods and services offered by a library. Also called “borrower” and “user”.
patron agency	The location/library where a patron is registered.
patron class	Known as “patron privilege class”.
patron record	The record that describes a patron. The description includes: name, barcode number, address, and other patron-related information.

peripheral	Also “peripheral device”. In a computer system, a functional unit that makes and/or receives data transfers. The term includes storage devices (such as tape drives), input devices (such as terminals), and output devices (such as printers).
physical volume	All that is contained in one binding, portfolio, etc., whether as originally issued or as bound after issue. A physical volume does not necessarily coincide with a bibliographic volume, which is characterized by a title page and separate pagination. See also <i>piece</i> .
PICK	The operating system and database management system used by ADVANCE.
piece	A barcoded circulation unit, usually corresponding to a physical volume. Each barcoded volume of a monographic bibliographic item is a piece. In ADVANCE, piece control is handled by the Cataloguing module’s holdings function.
pointer	A data element which specifies the record-number of a record in a file, or in a related file.
policies	Each library has certain characteristic ways of handling the way it conducts business. These are referred to as “policies”. Circulation Setup policies include loan periods, book limits, material types, renewal limits, fine amounts, and so on.
policy parameters	Library policies stated explicitly in the form of sets of values for the Geac-supplied tables, lists of options, and so forth.
policy tables	The tables completed by a library during the installation process. These define the library policies, contain the decisions regarding library options, outline the structure of the system and list the various codes used by the library. Each module has its own set of tables.
port	An interface that connects one or more devices (e.g., terminals, printers) to the computer. Each port has a unique number.
powerfail recovery	The computer’s ability to recover from power failures without losing data.
printer	A peripheral device used to provide hard copies of data.

priority level	Refers to a “security level” required to perform a function. There is a level of security associated with each command, ranging from 0 to 99 (highest = most). Synonymous with <i>access level</i> .
PROC	PROC is short for stored procedure. PROC allows the user to pre-store a complex series of operations which can be invoked by a single command. Anything which can be done at the TCL level can be accomplished with a PROC.
program	A sequence of machine-readable instructions that a computer can execute. When a program is executed, it performs some function or operation.
project manager	The Geac Project Manager is responsible for liaison between Geac and the individual customer.
prompt	A message from the <i>operating system</i> or an <i>application</i> program. Prompts appear on the CRT screen, and require a response from the computer operator.
publication pattern	A serial’s <i>enumeration</i> pattern, <i>chronology</i> pattern, and publication frequency pattern, used by the Serials module to predict issues.
purchase alert	A warning that additional copies of a title may be needed. Usually because all copies are missing or because the “hold ratio” for this item (that is, the number of holds compared to the number of active copies) is very high.
purchase order	A record authorizing a vendor to deliver materials or services, usually at a set price, to the library. One or more copies of one or more items can be covered by a single purchase order (sometimes abbreviated “PO”).

R

reboot	To perform a second or subsequent <i>boot</i> .
recall	To require that a book on loan be returned before the expiry of the due date that was assigned when the charge was made.
recompile	To perform a second or subsequent <i>compile</i> of a program.
recon	Retrospective conversion of bibliographic records into machine-readable format. This process typically occurs when a library purchases a

	library automation system but still has some bibliographic records that were never put into machine-readable format.
record	To make computer processing easier, data items are brought together to form a unit called a “record”. A group of records makes up a “file”.
recovery	The process of returning a system to operable condition following a failure.
reel	A magnetic tape volume or the tape and the spool on which it is wound.
registration	The process of recording information about individual patrons for the Circulation system, and especially of assigning barcode numbers to those patrons. Usually, “patron registration” applies to the initial entry of this information onto the system.
release	Release refers to a particular version of a package of software: for example, Release 5.0 of ADVANCE.
remote	A term applied to a device or operation that is geographically-separated from a computer but communicates with it.
renewal	The process whereby a borrowed item is checked out again to the same patron, effectively extending the loan period.
report	A result of processing in which data from various data fields is selected and presented in a particular way to provide certain pre-defined information to the user. The hard copy of this data is printed as a “report”.
reserve	A “reserve collection” is also known as “short loan collection”. In academic libraries, a type of material in high demand that has short loan periods assigned to it. Reserve is often applied to required course reading materials, or to new or topical items. The term “reserve” is sometimes used by public libraries to mean <i>hold</i> .
reserve book room	“RBR” is a function within the Circulation module designed to handle high-use materials in the reserve collection, often items associated with a course. It allows the user to enter instructor and course information, and links titles with the appropriate courses.
reserve recall	An item is recalled for the Reserve Book Room.

- response time Used in connection with computer systems. The amount of time it takes for an online system to give data requested of it. It is measured as the amount of time between the point when a user presses the ENTER or RETURN key and the point when the first character of response appears on the screen.
- restore To replace something which has been removed, deleted or damaged. Restoration is part of recovery, and usually refers to the process of replacing disk files with the backup copies on tape.

S

- scanning Also “wandering”. The act of drawing the lightpen across a barcode to read the barcode into the system.
- security level The level assigned to each function, command, and override in order to restrict its usage. Only those functions and commands having a priority level at or below the operator’s active access level may be used.
- “see also” reference A reference from an established form of a heading to one or more related headings. Also known as a "see also" cross reference.
- see reference A reference to the established form of a name from a form which should not be used as a heading. Also known as a “‘see’ cross reference”, “rejected form heading”, or “variant form heading”.
- serial A publication issued in successive parts bearing numerical or chronological designations and intended to be continued indefinitely. This includes periodicals, newspapers, annuals, etc. In ADVANCE, a serial is a *bibliographic item* (catalogued in the Cataloguing module) which may also have a *publication pattern* and *copy set* defined in the Serials module. A serial may also have *pieces* (barcoded items) assigned to it. Also see the definitions of *issue*, *copy*, and *holdings*.
- Serials module The ADVANCE module that automates serials control — primarily checkin and issue prediction.
- shelf list A catalogue of the items in a library; items are described in the same order that they are arranged on the shelves.
- shelf location Also “local call number”. The *call number* assigned to a specific copy of an item.

sign off	Also “log off” and “logging off”. To enter the necessary information to end a session on a terminal. The console command is “OFF”. Compare to <i>sign on</i> .
sign on	Also “log on”, “log in”, and “logging on”. To enter the necessary information (such as an identification number or password) to begin a session on a terminal. The console command is entry of a valid account name.
site	Customer library, usually where the computer is located.
sort	To arrange entities according to some pre-defined criteria, usually alphabetic.
spine label	Label for the spine of a book, typically with the call number.
string	Any succession of characters. These can be numbers, letters, blanks, or other characters. The PICK system treats most data simply as a sequence of symbols or “string”.
subfield	In MARC format, the name for a defined part of the field in a MARC <i>variable-length field</i> , such as subfield b.
subfield code	The one-character code which identifies a MARC subfield: for example, the “a” in “ \ddagger a”.
subject headings	Authorized terms that describe the contents of a book. Several may apply to a single work. One North American standard is LC Subject Headings.
surcharge	The charge automatically levied against a patron to cover certain costs, such as the cost of postage for notices, or ordering and cataloguing a replacement book.
syndetic structure	The logical organization of the catalogue, using “ <i>see</i> ” and “ <i>see also</i> ” <i>references</i> to interrelate the concepts represented in the catalogue.
SYSPROG	System Programmer. The highest-level account within PICK.
system backup	To copy (back up) all the files making up the system.
system manager	The library staff member responsible for the systems staff and the computer.

T

tag	The labelling mechanism used by MARC to associate data elements with their functions. Tags are composed of three digits: for example, “210” is the tag for the Abbreviated Title Field. Each different tag represents a different piece of bibliographic information: e.g., personal author, uniform title. “Tag” is sometimes used to mean MARC field.
tag number	A term sometimes used to mean <i>tag</i> .
tape	A magnetic tape reel or cassette, or the tape on the reel or cassette.
tape backup	The process of making a copy of data files and/or the system software. The library uses the backed-up tapes as a security precaution, in case the need for a 'restore' arises.
tape drive	The equipment that holds, reads from, and writes to magnetic tapes.
TCL	“Terminal Control Language” processor. TCL is the primary interface between end-users and the computer. The state in which the computer <i>prompt</i> is displayed and is waiting for user input is commonly called being “at TCL”.
telecommunications	The organization and facilities that provide communications service between users in geographically separated locations. The term encompasses telephone, telegraph, radio, and satellite-based systems; unless otherwise indicated, telephone is usually assumed.
terminal	A device used by a person to communicate with the computer.
Terminal Number	Each terminal in a library system is assigned a unique number.
title	The name of a work, including any alternate title, subtitle, or other associated descriptive matter preceding the author, edition, or imprint statement on the title page.
tracing	Any record of entries or references that have been made in connection with the cataloguing of a particular work or publication, or with establishing a particular heading. Also known as subject headings or added entries.
track	A unit of data storage space on disk.

-
- transfer To read data in one location and write it in another location.
- transaction Any checkin, checkout, renewal, or hold.

U

- UK/MARC The United Kingdom version of the MARC format.
- UNIX A computer *operating system* developed by Bell Laboratories.
- upload The data flow from the microcomputer **up** to the host computer system.
- UPS “Uninterruptable Power Supply” — essentially a series of batteries that conditions the power to the computer, and, with the absence of electricity, provides power to the computer for a period of time (e.g. 30 minutes.)
- user Same as *patron*.
- US/MARC The version of the MARC format used in the USA.

V

- variable-length field Also “variable field”. A MARC field in a bibliographic record whose length is not pre-defined: for example, the Title Statement Field (Tag 245). A variable field is composed of two one-digit *indicators* and one or more *subfields*.
- vendor A dealer, wholesaler, or other organization supplying books or other materials to the library.
- volume Bibliographic element of a series. For example, **The Art of Computer Programming** has three volumes. The important point is that volumes normally share SOME bibliographic elements with each other.
- voucher A request for the complete or partial payment of one or more invoices, usually sent to the library’s financial services department.

W

- wand Device for reading barcodes. Known as *lightpen*.
- wanding Known as *scanning*.

- WLN “Western (formerly ”Washington“) Library Network” — a bibliographic utility.
- word A unit of data storage: 8, 16, or 32 bits depending on the computer.
- work file A file where data is temporarily stored before being placed in the database. Used in the Cataloguing module.



User Permissions

Introduction

In the Utilities Function, library administration staff can define user-specific permissions for some Serials functions and tasks (see the *Utilities Management Guide*). This appendix lists and briefly describes these permissions.

Levels of Permission

There are three levels of permission: Y, N, and P.

- Y The user has permission for the specified function or task, perhaps qualified by special restrictions.
- N The user does not have permission for the specified function or task.
- P The user must enter a library-specified password to have permission. With the correct password, this is equivalent to Y; without the correct password, this is equivalent to N.

The P level is useful at libraries in which people share terminals and a single user ID is defined for an area of work (such as serials checkin). The high-security tasks can be password controlled. The people who know the password can enter the password when they need to perform the task, then afterward leave the terminal as is — they do not need to log off, log in as a higher-level user, perform the task, and afterward log back off and then on again as a lower-level general user.

Special Restrictions

Qualifiers or restrictions are not used with some types of permissions. Any permission designated as a type 2 on the General Permissions Setup table will not have a qualifier. Types of General Permissions are Geac

assigned and cannot be changed by the library. (See the *Utilities Management Guide*.)

Qualifier Code Permits you to retrieve any catalogue record, or only those that have a particular SHIPTO Code. Qualifiers are assigned on the UPDATE MODULE ACCESS RECORD (EACC) screen. To reach this screen select *Enter Access Codes* (EACC) from the SYSTEMS UTILITY MENU. See the *Utilities Management Guide*.

Keyword Table The library can specify by screen identifier which menus are available. Use the *Keyword table* option on the UPDATE MODULE ACCESS RECORD (EACC) screen to specify which menus are available. If no screen identifiers are specified, then the user can access all menus. To reach this screen select *Enter Access Codes* (EACC) from the SYSTEMS UTILITY MENU. See the *Utilities Management Guide*.

Permission List by Permission ID Number

Permission ID Numbers are assigned by the system. To display Permission ID Numbers grouped by module use MODULE PERMISSIONS (MPERM) on the SECURITY MENU.

072 - Edit serial publication patterns

108 - Check in serials

Permission Descriptions by Permission ID Number

072 - Edit serial publication patterns

Y / P You need this permission to update the information on the PUBLICATION PATTERN DETAIL screen, or to use the *Add* and *Delete* options on the PUBLICATION SUMMARY screen. The system validates permissions whenever you access any function that changes publication pattern information. In addition, if you have this permission and you want to change, add, or delete publication pattern records, the system also checks that you have permissions 069, 078, and 079 (add, delete, change holdings respectively). In order to verify these permissions, the system checks which Type of Holding record is linked to this publication pattern. If permission is granted to all the parts that use this publication pattern and Type of Holding record, you will be allowed to make the changes.

If permission is not granted, the system displays the message:

You can look but changes are not permitted.

Permission 072 is required when you update the Publication Pattern from *Publication pattern* field on the Parts Detail screen.

Note that users who have permission 072 should also be given Cataloging module permission 113 (Edit publication patterns), which is for non-serials and is needed to be able to create the first serial publication pattern for a new type of holding.

N Access to the *Add item* option on the PUBLICATION PATTERN SUMMARY screen is not available. Access to the *Delete* and *File* options on the PUBLICATION PATTERN DETAIL screen are not available. The message:

You can look but changes are not permitted

appears when you enter the PUBLICATION PATTERN SUMMARY and DETAIL screens.

Prerequisite To change, add, or delete publication patterns permissions 069, 078, and 079 may be required.

Restriction None.

108 - Check in serials

Permission 108 was intended to be used by staff who do not have permission to change holdings information, such as a Serials check-in clerk. Permission 108 gives staff access to the *Holdings edit* functionality.

Y / P Allows you to checkin serials from *Holdings edit* and from the CHECKIN screen in the Serials module. This permission can be used to restrict (by using a qualifier) Checkin functions to specific SHIPTO codes. NOTE: When a default SHIPTO code is assigned from the User Defaults (CUDEF) screen on the SERIALS CONTROL CONTROL MENU (CTLM), the SHIPTO Selection screen is bypassed. The system displays the CHECKIN screen for the assigned SHIPTO code.

You also need this permission to add (permission 078) or delete holdings (permission 079) and change current information for holdings (permission 69) if you are updating or creating serials copy set information.

Prerequisite None.

Restriction SHIPTO CODE.

Serial Copy Set Summary Screen

Checkin If you only have permission to checkin serials (permission 108) and do not have permission to change holdings information (permission 069), add holdings (permission 078), and delete holdings (permission 079), when you reach the SHIPTO SELECTION screen, only the SHIPTO CODES for the location copies you are allowed to check in will display.

Claims The system checks for the SHIPTO CODES you are allowed to check in (permission 108). If you are not permitted to check in the specific SHIPTO CODE, the system checks for permission to change holdings information (permission 069). If you do not have either of these permissions, the system displays the message *You can look at this item but changes are not permitted.* On the CHKM - CLAIM DETAILED DISPLAY screen the only options displayed are *Help* and *Exit*.

On the CHKM - CLAIM DETAILED DISPLAY screen, if you change the status to *1 Received*, you must have permission 078 if permission 108 is not granted.

SHIPTO SELECTION Screen

If you do not have permission to change holdings information (permission 069), add holdings (permission 078), and delete holdings (permission 079), when you reach the SHIPTO SELECTION screen only the SHIPTO Codes that have been allowed by permission 108 will be available to you.

If you have permission to change holdings information (permission 069), add holdings (permission 078), or delete holdings (permission 079), when you reach the SHIPTO SELECTION screen all the SHIPTO Codes for this title will display. Therefore, SHIPTO Codes that are restricted by permission 108 will appear on the screen. That is, the holdings permissions override permission 108. When you proceed to the next screen, for example, Checkin, you must have the appropriate permissions. Checkin (receiving items) requires permission 078 (add holdings) for the part and its sublocation. For example, if the part belongs to the Main Library, North Branch, you must have permission 078 for the North Branch sublocation in order to check in the part.

PARTS SUMMARY Screen

The *insert at line #* option is available if you have serials check in (permission 108) or add holdings (078).

The *Delete item(s)* option is available if you have serials check in (permission 108) or delete holdings (079)

PARTS DETAIL Screen

You can change the information in fields 1-10 (shown on the following list) only if you have permissions noted.

- 1. Type of Holding – requires permission 069 *Change holdings information* for every part that uses this Type of Holding for this title.
- 2. Publication Pattern - to use C to change the publication pattern, you must have permission 072 (Edit Serial Publication Patterns) for all the location copies for this part, and should also have 113 (Edit Publication Patterns). You also need permission 069 (*Change holdings information*) for all the location copies that are linked to the Type of Holding for this publication pattern. To change the publication pattern (use ?? and retrieve a pattern) you must have permission 072, and either:
 - permission 069 qualified for all location copies for this part
 - or,**
 - permission 108 qualified by the SHIPTO Code for this part.
- 3. Enumeration/Chronology – requires permission 069 *Change holdings information* for every location copy of this part. Or, you must have permission 108, qualified by the SHIPTO Codes for this part.
- 4. Alternate Enumeration/Chronology – requires permission 069 *Change holdings information* for every location copy of this part. Or, you must have permission 108, qualified by the SHIPTO Codes for this part.
- 5. Status – requires permission 069 *Change holdings information* for that location copy. Or, you must have permission 108, qualified by the SHIPTO Codes for this part.
- 6. Barcode – requires permission 069 *Change holdings information* for that location copy. Or, you must have permission 108, qualified by the SHIPTO Codes for this part.
- 7. Nonpublic note – requires permission 069 *Change holdings information* for that location copy. Or, you must have permission 108, qualified by the SHIPTO Codes for this part.
- 8. Title – requires permission 069 *Change holdings information* for every location copy of this part. Or, you must have permission 108, qualified by the SHIPTO Codes for this part.

- 9. Copyright Fee – requires permission 069 *Change holdings information* for every location copy of this part. Or, you must have permission 108, qualified by the SHIPTO Codes for this part.
- 10. Gregorian Year – requires permission 069 *Change holdings information* for every location copy of this part. Or, you must have permission 108, qualified by the SHIPTO Codes for this part.

If you are adding a new part and have permission to add holdings (permission 078), then you can change any of the fields above.

If you are not permitted to change any location copy information for a part, the system displays the message:

You can look at this item but changes are not permitted

- | | |
|---------------|--|
| File Option | Displays if you add a new part and have permission 078 or you have permission to change holdings information (permission 069) or checkin serials (permission 108) and these permissions allow you to change the location copy information for the part. |
| Delete Option | This option displays if you are adding a new part record and have permission to add holdings (permission 078) or you have permission to delete holdings (permission 079) or checkin serials (permission 108) which allows you to delete every location copy that belongs to this part. |

Parts Details For Location Copies

You can change the location copy information only if the Sublocation code of the location copy is qualified by permission 069 or if the SHIPTO codes for the copy set that the location copy belonged to is qualified by 108.

If you are changing the status to 1 - Received, the system checks whether you have permission to add holdings (permission 078) or you have permission 108.

- | | |
|--------------|--|
| Notes Field | If you are not permitted to change the location copy information, the system displays the message:

You are not permitted to update this item. |
| Location Add | The system displays a list of Location copies that you are permitted to add. The locations are validated by the sublocation and SHIPTO Code qualifiers and by the permissions to add holdings and to checkin serials (permissions 078 and 108 respectively). |

CHECKIN Screen by SHIPTO CODE and Type of Holding

Applies to all checkin screens whether issues, supplements or indexes.

All functions are accessible if you have permission 108. If permission 108 is not granted, but you do have permission to change holdings information (permission 069), add holdings (permission 078), and delete holdings (permission 079), all these options will be available.

- | | |
|----------------|---|
| Checkin # | If permission 108 is not granted then Checkin requires permission 078 and the correct qualifiers. If no qualifiers are specified then you can checkin any location copies. If a qualifier is specified then you can only checkin the location copies that are qualified by 078. |
| Insert after # | Displays the PARTS DETAIL screen. See previous section. |
| Retrieve # | Displays the PARTS DETAIL screen. See previous section. |
| Delete # | If permission 108 is not granted then the system checks that you have permission to delete holdings (permission 079) and that you are allowed to delete each location copy of the part. |

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