

ADVANCE

Serials User's 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*
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Software Described ADVANCE Library System
Release 6.82 (September 2000)

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1

Introduction

Purpose

The *Serials User's Guide* explains how to use the Serials Module of the Geac ADVANCE Library System to check in and maintain serial holdings.

Contents

Chapter 2 of this guide provides a brief overview of the Serials Module, and includes a function/menu map.

Chapter 3 describes the Checkin Functions.

Chapter 4 describes the Routing Function.

Chapter 5 describes the Vendor Maintenance.

Appendix B illustrates how the *NUMBERING CODE*, *MAXIMUM UNITS*, and *BASE LEVEL* fields of the PUBM - PUBLICATION PATTERN screen affect a complex serial's predicted enumeration.

Other Documentation

Consult other guides for related information:

- The *Serials Management Guide* describes how to set up the Serials Control System (Module) and how to use the Calendar Processor.
- The *Acquisitions Management Guide* describes how to set up and customize the Acquisitions Module, how to use the background processing jobs, reports, and loaders.
- 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, transaction logging, and server operations.

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: “ORDA”, “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 *Ordering*”.

Generic Examples

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

2

Overview

This chapter provides:

- a brief tour through serials control
- a discussion of accessing menus and functions
- a map of the Serials menus and functions
- a discussion on serials terms used throughout the Serials Module
- a brief discussion and display of a variety of serials holdings and piece information screens using comparisons from Serials and the Online Catalogue
- a discussion on sending claim letters to vendors.

General instructions on accessing screens and editing fields throughout ADVANCE are provided in Appendix A, *Using ADVANCE*.

Serials Control

The control of serials is focused in the Serials Control Module, but partially distributed across all modules of ADVANCE: Cataloguing, Circulation, Online Catalogue, and Acquisitions. The following list of serials elements and tasks specifies the controlling modules for each. The serials elements are defined in the *Terminology* section of this chapter.

Bibliographic information

is created and edited in Cataloguing. This information can also be created in Acquisitions for a new item. The Serials Control Module can access only catalogued items.

Pieces

are created and edited in the Holdings function. Pieces corresponding to specific issues can also be created at Serials checkin time. Temporary piece descriptions (for generic Placeholder pieces) can be added at Circulation checkout time. Pieces corresponding to ordered and/or received copies can also be created in Acquisitions.

Copy sets

are created when they are ordered in Acquisitions. Copy sets can also be created and edited in the Holdings function.

Publication patterns

for a serial are created and edited in the Holdings function. This information can also be created from Acquisitions when ordering a new item.

Issue checkin

(receiving) is handled in Serials.

Orders and invoices

including subscription renewal orders, are created and maintained in Acquisitions but can also be displayed in Serials.

Summary holdings statements

are created in the Holdings function but can also be displayed in the Online Catalogue.

Copy holdings statements

(checkin history lines) are created in Serials but can also be displayed in the Online Catalogue.

Issue claiming

is handled in Serials.

Vendors

are defined and edited in Serials or Acquisitions.

Routing slips for received issues are handled in Serials. The patrons that may be included in routing lists have their permissions set in Circulation.

Copy binding is handled in the Holdings function.

Accessing the Menus and Functions

Any Serials Control Module function can be accessed directly by entering its screen identifier at any Serials menu, or indirectly by going through menus.

An index of screen identifiers is provided in the *Screen Index* at the end of the guide, and a list of menus and directly accessible screens is provided in the Serials Menu Map section of this chapter. The main menus are described on the following pages.

The menus are customizable. Whether you must go through one or two menus to reach the Serials function you want depends on the port setup and individual access levels on your system. Customizing menus, port setup and individual access levels are all defined in the system utilities (see *Utilities Management Guide*).

ADVANCE Master Menu

The screen identifier for the standard ADVANCE MASTER MENU is MM.

```

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

1. CAT  Cataloguing          4. ACQ  Acquisitions
2. CIRC Circulation          5. SER  Serials Control Menu
3. OPAC Online Catalogue     6. UTIL Utility Menu

                                7. ON   Change User
                                8. OFF  Log Off

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

Serials Main Menu

Access the full standard SERIALS CONTROL MAIN MENU by selecting it on the MASTER MENU, or by entering the screen identifier SER.

```
DD MMM YYYY          Geac ADVANCE Library System (X.XX)          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 :
```

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.

Serials standards that you might find useful include the *USMARC Format for Holdings Data* and the *NISO Holdings Statements for Bibliographic Items* (ANSI Z39.71-1998).

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 — including periodicals, newspapers, annuals, society proceedings, and numbered monographic series (adapted from the ALA Glossary). In practice, a serial is any bibliographic item with an appropriate Material Code that allows you to access the item in the Serials Control Module in order to define a publication pattern and copy set for it. |
| copy set | a run of issues of the serial, simplistically 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 basic issues, supplements, and indexes. At 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. |
| <i>copy holdings statement</i> | 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”. |

| | |
|-----------------------------------|---|
| <i>summary holdings statement</i> | a description of a range of checked-in issues for a copy: 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 numerous active and/or inactive publication patterns. |
| 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. |

Holdings Screens

ADVANCE displays a variety of serials holdings and piece information on several similar screens. For comparison, this section provides sample screens (or sets of screens) from Serials and the Online Catalogue.

Holdings display consistently whether they are single-parts, multipart, or serials.

Serials Display

Screen formatting differs between the Online Catalogue and other screen displays. Example displays are provided.

Screens

The sample screens provided in this section are:

- SUMMARY HOLDINGS STATEMENTS FOR (SHIPTO CODE) screen in Serials Checkin displays issues, supplements, then indexes
- CHKM - SERIAL HOLDING in Serials Checkin displays indexes, supplements, then issues
- Online Catalogue - BRIEF DISPLAY screen in the Online Catalogue displays issues, supplements, then indexes

Information

The holdings information these screens show can include:

- non-gap breaks, such as a non-published issue, represented by a semi-colon
- gap breaks, an interruption in the library's holdings, represented by a comma
- range in holdings, an uninterrupted sequence of holdings, represented by a dash
- a change in publication pattern represented by a space
- the summary holdings statement for a location
- the last checked in (Received) copy for a location (Online Catalogue only)
- the copy holdings list (checkin history) for a copy set

Other Screens

ADVANCE also displays:

- the copy set list for a serial — on the SERIAL - COPY SET SUMMARY screen

- the description of a single piece — on the PIECES DETAIL —MULTI-PART screen in Serials, Circulation, Cataloguing, and Acquisitions.

SUMMARY HOLDINGS STATEMENTS for (SHIPTO CODE)

This screen in the Serials Checkin function shows the summary holdings statements for all copy sets with the selected SHIPTO Code displayed by Type of Holding.

Access

To reach this screen select the *Summary holdings* option from the CHKM – CHECKIN FOR (SHIPTO CODE) – (TYPE OF HOLDING) screen.

```

                                SUMMARY HOLDINGS STATEMENTS FOR UNIT5
                                USER1
LCN      :10008609  Call #: UNC                      ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+  LCCN: sf 80001055

      CAMPUS  LIBRARY    COLLECTION/CALL NUMBER          COPY #
1.  ADVLIB  CENTRAL    GENERAL/                          1
    Library holds:
    Paper: Vol.43:No.49(AUG:22:1997)-Vol.44:No.4(SEP:26:1997),
    Vol.44:No.6(OCT:10:1997),Vol.44:No.8(OCT:24:1997)-
    Vol.44:No.19(JAN:23:1998),Vol.44:No.21(FEB:06:1998)
2.  ADVLIB  CENTRAL    GENERAL/                          2
    Library holds:
    Paper: Vol.43:No.49(AUG:22:1997),Vol.44:No.2(SEP:12:1997)-
    Vol.44:No.4(SEP:26:1997),Vol.44:No.6(OCT:10:1997),
    Vol.44:No.9(OCT:31:1997)-Vol.44:No.21(FEB:06:1998)

Options:
Forward  ? Help  Exit
```

CHKM - SERIAL HOLDING

This screen in the Serials Checkin function shows the copy holdings list (checkin history) for one or more copy sets.

All Copy Sets

If you select a multiple copy set serial, you can simply <ENTER> in response to the line number prompt to display the holdings of all copy sets.

One Copy Set

If you select a single copy set serial, the system shows the holdings for that single copy set. If you select a multiple copy set serial, you can specify a particular copy set (by line number) for display.

Access

To reach this screen select the *Holdings* option from the SERIAL COPY SET SUMMARY screen.

```

                                CHKM - SERIAL HOLDING                                MASTER
LCN      :10008609  Call #: UNC                                ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+        LCCN: sf 80001055

                                TOTAL COPIES: 4

ENUMERATION/CHRONOLOGY          CAMPUS COPY STATUS          DATE
1. Vol.44:No.22(FEB:13:1998)    ADVLIB 3    Exp issue    02/13/98
2. Vol.44:No.22(FEB:13:1998)    ADVLIB 2    Exp issue    02/13/98
3. Vol.44:No.22(FEB:13:1998)    ADVLIB 1    Exp issue    02/13/98
4. Vol.44:No.22(FEB:13:1998)    ADVLIB 4    Exp issue    02/13/98
5. Vol.44:No.21(FEB:06:1998)    ADVLIB 3    Received     05/05/98
6. Vol.44:No.21(FEB:06:1998)    ADVLIB 2    Received     05/05/98
7. Vol.44:No.21(FEB:06:1998)    ADVLIB 1    Received     05/05/98
8. Vol.44:No.21(FEB:06:1998)    ADVLIB 4    Received     05/05/98
9. Vol.44:No.20(JAN:30:1998)    ADVLIB 3    Received     05/04/98
10. Vol.44:No.20(JAN:30:1998)   ADVLIB 2    Received     05/04/98

Options:
Forward  Backward  ? Help  Exit

```

Online Catalogue Screens

The BRIEF or DETAILED DISPLAY screen in the Online Catalogue displays bibliographic information on the upper portion of the screen and holdings information on the lower portion of the screen. The content of the bibliographic display is defined on the Bibliographic Displays (OBD) table in ONLINE SEARCH SETUP. Content of the Holdings display is determined by the type of material (single-part, multipart, or serials), the number of copies, and the library defined threshold. (See the OPAC HOLDINGS DISPLAY DEFINITION tables in ONLINE SEARCH SETUP.)

Holdings Display

Holdings display according to Level 1, Level 2, Level 4, or Level 5 specifications.

- | | |
|---------|--|
| Level 1 | Displays location information not copy specific information. Summarizes the holdings for a specific institution, sublocation and collection but does not tell you how many copies. Circulation status is not provided. |
| Level 2 | Displays copy information about single-parts. Includes location, copy number, circulation, and other information usually found in the Piece record. Electronic copies of single-part titles are also displayed at this level. |
| Level 3 | Not used. |
| Level 4 | Displays location information and summary holdings statements for every copy of a multipart or serial held by the library. Displays electronic copies of a multipart or serial title. Each item in the display represents a different copy of the title. |
| Level 5 | Displays detailed information about a specific copy of a multipart or serial title including the location of the copy. Each issue or volume (contained within the copy) whether barcoded or not can be displayed at this level. |

The online catalogue search screens display:

- the summary holdings statements for all locations
- the last Received copy for each location.

Level 4

Online Catalogue - BRIEF DISPLAY

(1 of 1 titles)

Author(s) :Editorial Projects for Education, Inc.
Title :The Chronicle of higher education
Subject :Education, Higher -- Periodicals
Education -- periodicals
Universities -- periodicals
Language :English

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:

1. ADVLIB Central GENERAL c.1 /Regular print
Paper: Vol.43:No.49(AUG:22:1997)-Vol.44:No.4(SEP:26:1997),
Vol.44:No.6(OCT:10:1997),Vol.44:No.8(OCT:24:1997)-
Vol.44:No.19(JAN:23:1998),Vol.44:No.21(FEB:06:1998)
Last rec'd: Vol.44:No.21(FEB:06:1998) on MAY 5, 1998
2. ADVLIB Central GENERAL c.2 /Regular print
Paper: Vol.43:No.49(AUG:22:1997),Vol.44:No.2(SEP:12:1997)-
Vol.44:No.4(SEP:26:1997),Vol.44:No.6(OCT:10:1997),
Vol.44:No.9(OCT:31:1997)-Vol.44:No.21(FEB:06:1998)

4 item(s) in list.

Options:

| | | | | |
|---------------|------------|--------------|---------------|--------------|
| # item | Forward | Prior screen | Extend search | Full display |
| Limit list | Output | MARC | Holdings | ILL request |
| Order display | | | | |
| Review search | OPAC parms | New search | Reset | ? Help |

Level 5

```

                                Online Catalogue - BRIEF DISPLAY          (1 of 1 titles)

Author(s)      :Editorial Projects for Education, Inc.
Title          :The Chronicle of higher education
Subject        :Education, Higher -- Periodicals
                Education -- periodicals
                Universities -- periodicals
Language       :English

Location : AL CENTRAL GENERAL copy 1
          Issue Number                      Status
          -----
1.  Vol.44:No.22(FEB:13:1998)                Exp issue
2.  Vol.44:No.21(FEB:06:1998)                Received
3.  Vol.44:No.20(JAN:30:1998)                Item due
4.  Vol.44:No.8(OCT:24:1997)-Vol.44:No.19(JAN:23:1998)  Received
5.  Vol.44:No.7(OCT:17:1997)                Claimed
6.  Vol.44:No.6(OCT:10:1997)                Received
7.  Vol.44:No.5(OCT:03:1997)                Claimed

8 item(s) in list.
Options:
# item  Forward  Prior screen  Extend search  Full display
Limit list  Output  MARC  Holds  ILL request  Order display
Review search  OPAC parms  New search  Reset  ? Help
```

Claims

ADVANCE can generate serials claim letters to request missing or replacement issues.

Setup The library's setup tables customize the way the system handles claims; refer to the *Serials Management Guide* for details. The features include:

- the FISCL table's question: Allow system to autogenerate claims?
- the CLNO table's claim number format
- the CLMCD table's Claim Codes
- the CLMSG table's Claim Message Codes.

Claim creation A claim and its first letter can be created in two ways:

- You can assign the CLAIMED status to a copy at the CHECKIN FOR (SHIPTO CODE) – (TYPE OF HOLDING CODE) screen (and edit claim information at the CHKM - CLAIM DETAILED DISPLAY screen).
- If the library has claim autogeneration activated, the Serials Claim Generation job (SCC) can automatically select late copies based on their Claim Code, CLAIM DELAY, and expected receipt date (predicted publication date plus RECEIPT DELAY).

NOTE: If a Claim Code is not assigned in the CLM CODE field of a copy set's SERIAL COPY SET DETAIL screen, then the system will not autogenerate claims for late copies in that copy set.

Claim Review List When a claim letter is generated, a reference to it is added to the Serials Claim Review List.

This list, displayed in the Claims Function, is used by the system when printing claim letters. If you “delete” a reference from the list, the letter will not be printed and the claim's ACTIVE status is changed to N.

Printing claims The claim letters referenced in the Serials Claim Review List and described at the current CHKM - CLAIM DETAILED DISPLAY screen can be printed in two ways:

- At the PRINTING CLAIM LETTERS screen in the Claims Function, you can either print all letters (the default) or print only the ones for a specified vendor.

- The Claim Print job (SCLMP) can automatically print all letters.

When a letter is “printed”, it is sent to a print hold file rather than directly to a printer. Once the letters are in the print hold file, you can use the *Send Outputs to Printer* option on the SERIALS CONTROL CALENDAR PROCESSOR menu (SCP) to send them to the printer.

When a letter is printed to the print hold file, the claim reference is removed from the Claim Review List and the claim status is changed to ****Printed****. This status is changed, even in claims whose references you “deleted” from the List, in order to allow for later reprinting.

Later claim letter generation

Later claim letters can be generated in two ways:

- You can “reprint” the claim at the CHKM - CLAIM DETAILED DISPLAY screen by *Filing* a ****Printed**** claim and answering Y to the *REPRINT* prompt.
- If the library has claim autogeneration activated, the Serials Claim Generation job can automatically select **active** claims based on the Claim Code, the number of times claimed already, and the *ACTION DATE*.

The Claim Code specifies the number of days between subsequent claims, and whether the copy should be marked *Missing* at the end of the claim cycle. The *ACTION DATE* is set by the system but can be changed at the CHKM - CLAIM DETAILED DISPLAY screen.

Missing copies

There are two ways the copy status can be changed from *Claimed* to *Missing* (and the claim *ACTIVE* status changed from Y to N):

- You can assign the *Missing* status at the CHECKIN FOR (SHIPTO CODE) – (TYPE OF HOLDING CODE) screen.
- If the library has claim autogeneration turned on, the Serials Claim Generation job can do it automatically for active claims, based on the Claim Code, the number of times claimed already, and the *ACTION DATE*.

Autogeneration turned off

If the library has claim autogeneration turned **off**, the Serials Claim Generation job does not create claims or later claim letters, or change the copy status to *Missing*.

The job merely sends claim information to an internal list so that the Serials Claim Verification job (SCLMV) can be run to produce a report. You can read this report and then decide what action to take.

After creating a claim (and generating its first letter), the only way to generate further letters is to “reprint” the claim at the CHKM - CLAIM DETAILED DISPLAY screen.

Historic claims If a copy’s status changes from Claimed to something else such as Received or Missing, then the claim is automatically marked inactive and removed from the Checkin Function’s CHKM - CLAIMS SUMMARY screen. The claim is now referred to as “historic”.

You can still access a “historic” claim’s CHKM - CLAIM DETAILED DISPLAY screen by doing a TX search on the claim number, but you can not update or “reprint” the claim. Historic claims are also included in the Inactive Claim Report.

If you change the copy’s status back to Claimed at the CHECKIN FOR (SHIPTO CODE) – (TYPE OF HOLDING CODE) screen, the claim comes back to life.

Deleted claims If you *Delete* an issue box from the Checkin Screen, then any claims on copies of that issue are permanently removed.

These claims cannot be accessed by a TX search on claim number, and any existing references to them are removed from the Claim Review List.

Vendor change in Serials If you change the copy set vendor, at the SERIAL COPY SET DETAIL screen, the system asks whether or not outstanding claims should be reissued to the new vendor. If you answer yes, the Serials Claim Generation job (SCC) will change the claims’ vendor the next time it is run. If you answer no, outstanding claims will continue to be sent to the old vendor.

Vendor change in Acquisitions If Acquisitions staff change an order’s vendor, they are asked when the change should take place in Serials. The Serials Claim Generation job (SCC) will change the *VENDOR CODE* field of the SERIAL COPY SET DETAIL screen on that date, and report the change. Any new claims created after that date will be to the new vendor.

Acquisitions staff are also asked whether or not any claims outstanding on that date should have their vendor changed. If you answered yes, then the next time an outstanding claim is generated it will be sent to the new vendor rather than the old one. If you answered no, outstanding claims will continue to be sent to the old vendor.

Menu and Function Map

The menus and functions you may encounter in using the Serials User's Guide are listed as follows. 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*.

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

Checkin

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

- accessing the functions
- retrieving a serial
- checking in **some** or **all** copies of an issue
- retrieving an issue on a checkin screen for displaying or updating issue information (type, enumeration, chronology, expected receipt date, prediction number) and copy information (status, barcode, notes)
- predicting issues beyond the next expected
- inserting an unpredicted issue on a checkin screen and adding issue and copy information for it
- deleting or moving an issue on a checkin screen
- displaying notes: CHKM - SERIAL COPY SET NOTES DISPLAY screen and CHKM - FREQUENCY NOTES DISPLAY screen
- displaying the bibliographic record: BIBLIOGRAPHIC MARC DISPLAY screen
- displaying summary holdings: SUMMARY HOLDINGS STATEMENTS FOR (SHIPTO CODE)
- displaying holdings checkin history: CHKM - SERIAL HOLDING
- displaying claims: CHKM - CLAIMS SUMMARY
- editing a claim: CHKM - CLAIM DETAILED DISPLAY screen
- updating the status of the checkin record from the Claim Detailed Display

- displaying orders: CHKM - ORDER SUMMARY DISPLAY screen and the CHKM - ORDER DETAILED DISPLAY screen
- updating an order
- displaying an invoice: CHKM - INVOICE DETAILED DISPLAY screen.

Accessing Checkin

Access the Checkin Function by selecting 1 at the SERIALS CONTROL MAIN MENU, or by entering the screen identifier CHKM at any Serials menu.

The menu offers access to all Serials functions but, depending on the permissions assigned to your ID, some functions might not be accessible. Permissions are defined by your system administrator. Refer to the *Utilities Management Guide* for further details.

```
DD MMM YYYY          Geac ADVANCE Library System (X.XX)          DEFAULT  AU
HH:MM                ADVANCE Development X.XX
```

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 :
```

Retrieving a Serial

The first screen in the Checkin Function is the search screen.

You can only retrieve serials from the catalogue database. A serial is defined as an issue whose Material Code is one of the ones listed in the library's VALID MATERIAL CODES serials setup screen (SMAT). These codes might include `as`, `cs`, and so on.

Most of the ways of searching for a serial involve the Online Catalogue. (The exceptions are `PO`, `TX`, `VC`, `VN`, `RQ`, `LST`, and `LCN` searches.) For a full description of Online Catalogue searching, see the *Online Catalogue Guide*.

```

                                CHKM - BIBLIOGRAPHIC SEARCH                                ID.CODE

ENTER type of serial retrieval:

CODEN Search CODEN #s                                PO Search order #s
T Search titles                                       TX Search Claim transaction #s
A Search authors                                     VC Search order vendor codes
S Search subjects                                    VN Search order vendor names
I Search ISBN/ISSN #s                                RQ Search order request #s
L Search LC Card #s                                  LST Retrieve last BIB accessed
TW Search title keyword                              OCLC Search OCLC #
AW Search author keyword                             LCN Search Local Control #
C Search Call #

Enter option=

Enter the search code and string (eg A=TWAIN), or <ENTER> to exit

```

Search Options

There are two ways to start a search:

- enter the search code, an equals sign, and your search string, then `<ENTER>`. For example:

```
Enter option= T=CHRONICLE OF HIGHER
```


- enter the search code and <ENTER>, at the new prompt, enter your search string and <ENTER> again. For example:

```
Enter option= T
Enter search string=CHRONICLE OF HIGHER
```

| | |
|---------|--|
| <ENTER> | Returns to the SERIALS CONTROL MAIN MENU or other screen at which you entered the CHKM screen identifier. |
| T | Searches on the title heading in the Online Catalogue. Use the <i>Retrieve</i> option to obtain the SERIAL COPY SET SUMMARY. |
| A | Searches on the author heading in the Online Catalogue. Use the <i>Retrieve</i> option to obtain the SERIAL COPY SET SUMMARY. |
| S | Searches on the subject heading in the Online Catalogue. Use the <i>Retrieve</i> option to obtain the SERIAL COPY SET SUMMARY. |
| I | Searches on the International Standard Number (ISBN or ISSN) in the Online Catalogue. Use the <i>Retrieve</i> option to obtain the SERIAL COPY SET SUMMARY. |
| L | Searches on the Library of Congress Control Number (LCCN) in the Online Catalogue. Use the <i>Retrieve</i> option to obtain the SERIAL COPY SET SUMMARY. |
| TW | Searches on one or more title words (a keyword search) in the Online Catalogue. Use the <i>Retrieve</i> option to obtain the SERIAL COPY SET SUMMARY. |
| AW | Searches on one or more author words (a keyword search) in the Online Catalogue. Use the <i>Retrieve</i> option to obtain the SERIAL COPY SET SUMMARY. |
| PO | Searches on the Purchase Order Number (<i>PO #</i>) assigned to orders in Acquisitions. (The numbers assigned to child items in Acquisitions are not indexed.) |

| | |
|-------------|---|
| <i>TX</i> | Searches on the Claim Number (<i>CLAIM #</i>) assigned to claims in Serials. The system displays the claim's CHKM - CLAIM DETAILED DISPLAY screen rather than the SERIAL - COPY SET SUMMARY screen. |
| <i>VC</i> | Searches on the Vendor Code assigned to orders in Acquisitions. |
| <i>VN</i> | Searches on the vendor name assigned to orders in Acquisitions. |
| <i>RQ</i> | Searches on the request number assigned to orders in Acquisitions. |
| <i>LST</i> | Retrieves the serial you last retrieved in Serials in the current session. Do not enter a search string. |
| <i>OCLC</i> | Searches on the Cataloguing Source Number (CSN) in the Online Catalogue. Use the <i>Retrieve</i> option to obtain the SERIAL COPY SET SUMMARY. |
| <i>LCN</i> | Searches on the Local Control Number (LCN) automatically assigned by the system to each item in Cataloguing. Enter the exact number — an index browse list will not be provided. |
| <i>C</i> | Searches on the call number in the Online Catalogue. Use the <i>Retrieve</i> option to obtain the SERIAL COPY SET SUMMARY. |

Selecting a Copy Set

When you retrieve a serial, the system displays the SERIAL - COPY SET SUMMARY screen listing the serial's copy sets; the following sample screen shows 4 copy sets. (The screen displays 3 due to space constraints.)

Copy Set Selection Restricted

The system does not allow you to select a copy set from the *Checkin* option on the SERIAL COPY SET SUMMARY screen. You can only check in **Active** copy sets. Other options, such as *Holdings*, *Claims*, and *Order Detail*, prompt you for a copy set number.

Permission 108

Serials check in is permission controlled. Use a SHIPTO code to restrict check in to specific locations. See the *Utilities Management Guide*.

| SERIAL COPY SET SUMMARY | | | | | | MASTER | |
|-------------------------|--|----------|---------|--------------|-------------------|------------|-------|
| LCN | :10008609 | Call #: | UNC | ISSN: | 0009-5982 | | |
| Title | :The Chronicle of higher education | | | | | | |
| Imprint | :[Washington, etc., Chronicle of higher e+ | | | | LCCN: sf 80001055 | | |
| | Location | SHIPTO | Status | Route list | Vendor | | |
| | ----- | ----- | ----- | ----- | ----- | | |
| 1. | ADVLIB Central GENERAL c.1 | UNIT5 | Claimed | Not Routed | FAXON | | |
| | Notes: Purchase copy | | | | | | |
| 2. | ADVLIB Central GENERAL c.2 | UNIT5 | Active | Not Routed | FAXON | | |
| | Notes: Purchase copy | | | | | | |
| 3. | ADVLIB Central GENERAL c.3 | UNIT5 | Active | Not Routed | JW&S | | |
| | Notes: Copyright deposit 2nd copy | | | | | | |
| 4 item(s) in list | | | | | | | |
| Options: | | | | | | | |
| | Check in | Holdings | Claims | Order detail | Forward | Limit list | Go to |
| | ? Help | Exit | | | | | |

Screen Options

Check in

Advances to a serial's checkin screen. On a checkin screen you can check in copies or edit the copy or issue information. If the serial has more than one SHIPTO CODE in its copy sets and you do not have a default

SHIPTO CODE for checkin defined on the User Defaults screen the SHIPTO SELECTION screen appears. After determining which copy sets have the selected (or default) SHIPTO CODE, the system determines which Type of Holding records are used by these copy sets. If more than one type of holding is used the TYPE OF HOLDING SUMMARY screen appears. From this screen you must select the type of material that you are checking in (i.e., issues, indexes, supplements). Once a selection is made (or if there is only one Type of Holding), the Checkin screen appears.

Holdings

Advances to the CHKM - SERIAL HOLDING screen which displays the serial's copy holdings.

If the serial has multiple copy sets, the system first prompts:

Enter line number to display =

For all copy sets, <ENTER>. To see the statements for only one of the copy sets, enter that copy set's line number before <ENTER>.

Claims

Advances to the CHKM - CLAIMS SUMMARY screen which lists the serial's copy claims. At that screen you may select a particular claim to display or edit.

If the serial has multiple copy sets, the system first prompts:

Enter line number to display =

The default is all copy sets. To see the claims for only one of the copy sets, enter that copy set's line number before <ENTER>.

Order detail

[Only available if the library has Acquisitions installed.]

Advances to either the CHKM - ORDER SUMMARY DISPLAY screen, which shows brief purchase order information for each copy set of a multiple copy sets serial, or to the CHKM - ORDER DETAILED DISPLAY screen, which shows detailed information for the order for a particular copy set.

If the serial has multiple copy sets, the system first prompts:

Enter line number to display =

The default is all copy sets. To see the detailed screen for only one copy set's order, enter that copy set's line number before <ENTER>.

Forward, Backward

Browses forward or backward in a long list of copy sets.

Limit list Allows you to restrict your search to specific terms, for example, `c . 2`. The specific term must appear within the display.

When this option is selected, the system displays the prompt:

```
Enter string to limit the listed items, or ? for Help
Press <ENTER> to display all items :
```

Go to The option line changes. The Holdings edit options appear: *OPAC display, Pieces display, Type of holdings display, Parts display, Pub. pattern display, Locations display, Serial copy display, Check-in serials, Bibliographic edit, Order display, and Exit.*

? help Displays a help message for this screen.

Exit Returns to the CHKM - BIBLIOGRAPHIC SEARCH screen.

Display Fields

The following columns of information are shown on the SERIAL COPY SET SUMMARY screen. To change the column headings and the information displayed use the Serial Copy Set Summary (Checkin) selection from the HOLDINGS DISPLAY DEFINITION (HDD) on the HOLDING SETUP MENU (CHSM).

Sequence Copy sets are listed in the same order that they were created for the serial.

Choosing Locations and Publication Types

When the *Check in* option is selected from the SERIAL COPY SET SUMMARY screen the system may display some or all of the following screens:

- SHIPTO SELECTION screen
- TYPE OF HOLDINGS SUMMARY screen
- CHECKIN screen.

Selecting a Receiving Location

When you select the *Check in* option, the system needs to know which SHIPTO location you are checking in and what type of material you are checking in. From this information the system decides which copy sets are being checked in. If the title's copy sets are linked to more than one SHIPTO CODE, ADVANCE displays the SHIPTO SELECTION screen. Select the SHIPTO CODE that you wish to checkin for.

A default SHIPTO Code can be specified on the User Default screen (CUDEF) on the SERIALS CONTROL CONTROL MENU. If you have a default specified and the title has copy sets with this SHIPTO CODE, the SHIPTO SELECTION screen is skipped. Also, if the copy sets for the title all have the same SHIPTO CODE, the SHIPTO SELECTION screen is skipped.

If there is only one SHIPTO CODE defined for the copy sets on this title, the system displays the TYPE OF HOLDING SUMMARY screen. If the copy sets for the selected SHIPTO have only one Type of Holding defined, the system displays the CHECKIN screen.

```

                                SHIPTO SELECTION

Number of records: 3
Please select the SHIPTO location that you are receiving for:
-----
1. UNIT5   Acquisition unit 5
2. UNIT10  Unit 10
3. UNIT6   Acquisitions unit 6

Options:
# line   ? Help   Exit
    
```

1. Select a SHIPTO location. This SHIPTO location defines where material is being received within the library. A SHIPTO CODE is assigned to each copy set in the system. If there is more than one type of holding defined for the copy sets at this SHIPTO location, ADVANCE displays the TYPE OF HOLDING SUMMARY screen.

Selecting a Type of Holding

The Type of Holding Summary screen displays before the Checkin screen when there is more than one Type of Holding linked to the copy sets that you are checking in (as determined by the SHIPTO CODE).

```

                                TYPE OF HOLDING SUMMARY                                MASTER
LCN      :10008609  Call #: UNC                                ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+        LCCN: sf 80001055

      Description                                Type  Supplement/Index type
      -----                                ----  -----
1.  Paper                                ISS
    Captions/Labels: Vol.:No.:(Month):(Day):(Year)
2.  General Index                        IND
    Captions/Labels: (year)
3.  General Index                        IND   Annual
4.  Loose-Leaf                          ISS
    Captions/Labels: v.:n.
5.  CD-ROM                              ISS
    Captions/Labels: Vol.:No.:(Month):(Day):(Year)

5 item(s) in list
Options:
# item  Limit list  Quit holdings  ? Help  Exit

```

1. Select a Type of Holding for the material that you are checking in. The CHECKIN screen appears.

Checking In Serials

From the Checkin screen you may:

- check in some or all the copies of an issue
- insert an unexpected or extra issue
- retrieve an issue to edit its issue or copy information
- move an issue to another place in the display
- delete an issue
- display and edit claims
- predict issues beyond the next expected
- display notes
- display summary holdings
- display and update order information
- display invoice information
- track status changes of serial checkins

```

                                CHKM - CHECKIN FOR UNIT5 - Paper                                MASTER
LCN      :10008609  Call #: UNC                                ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :{Washington, etc., Chronicle of higher e+      LCCN: sf 80001055
-----
|1|Vol. 44:No. 17(JAN)2|Vol. 44:No. 18(JAN)3|Vol. 44:No. 19(FEB)4|Vol. 44:No. 20(FEB)
|---:09:1998)          |---:21:1998)          |---:04:1998)          |---:18:1998)
|
|01/15/98              |01/30/98              |02/12/98              |02/27/98
|Received  4/4          |Item due  4/4          |Received  4/4          |Received  4/4
-----
|5|Vol. 44:No. 21(MAR)6|Vol. 44:No. 22(MAR)7|Vol. 44:No. 23(APR)8|Vol. 44:No. 24(APR)
|---:04:1998)          |---:18:1998)          |---:01:1998)          |---:15:1998)
|
|03/16/98              |03/27/98              |04/10/98              |04/27/98
|Exp issue  4/4          |Exp issue  4/4          |Exp issue  4/4          |Exp issue  4/4
-----
Options:
Checkin #  Insert after #  Retrieve #  Delete #  Forward  Backward
Claims    Order detail  Prior screen  Copy set notes  MARC
Summary holdings  Move Box #  ? Help  Exit

```

Checkin screens are identified by their SHIPTO codes and their type of holding codes which display in the screen title, i.e., UNIT5 — SHIPTO, Paper — Type of Holding.

Notes options The *Frequency notes* and *Copy set notes* options are offered only when there are notes to be shown.

Copy Counter Notice the copy counter in the status line at the bottom of each box. This counter, in the format xx/yy, tells the user how many (xx) copies are received out of the total (yy) number of copies for the SHIPTO and Type of Holding that was selected for checkin.

Screen Options

Checkin # Checks in **some** or **all** copies of the expected issues you identify by box or list number. Enter the number of an *Exp issue* (number 5, 6, 7 or 8), then <ENTER>.

The system sets the issue's copy statuses to *Received* and displays the number of received in the form number of received/number expected. For example, *Received 3/3* means three items were "received" and

three items were expected, similarly *Received 1/3* means one item was “received” and two additional issues are expected.

| | |
|-----------------------|---|
| Skipping an issue | You can use the <i>Checkin #</i> option on any expected issue. |
| Partial checkin | <p>You can check in some or all the copies of an issue by using the <i>Checkin #</i> option.</p> <p>The <i>User Defaults</i> (CUDEF) option from the SERIALS CONTROL CONTROL MENU (CTLM) determines what action occurs:</p> <ul style="list-style-type: none"> • checks in the total number of copies not yet received. • prompts you for the number of copies to check in if more than one copy still needs to be received. |
| No active copy sets | If all of the serial copy sets that meet the SHIPTO and Type of Holding selection criteria are inactive, the expected issues are still shown but you cannot check them in. |
| Treated as Received | In order to display useful counts of expected issues, the system administrator can set specific statuses to be included in the Received count. On the CHKM – CHECKIN FOR (SHIPTO CODE) – (TYPE OF HOLDING) screen, issues that are treated as received are summed together so that the checkin box or line shows more reliable information. For example, <i>Received 5/7+</i> may mean four issues are received, 1 issue is in the bindery, and 2 issues are claimed. The <i>Treat items as Received on the Checkin screen</i> option is available on the CHECKIN TYPE CODE table on the SERIALS CONTROL CODE TABLE MENU. |
| Highlighting | The box or line is highlighted when an issue is expected, or if some of the expected issues are still outstanding. The box or line is not highlighted if the issue is fully <i>Received</i> (or has statuses that are treated as <i>Received</i>). |
| <i>Insert after #</i> | <p>Advances to the CHKM – CHECKIN FOR (SHIPTO CODE) – (TYPE OF HOLDING) screen for you to add a new issue. Enter the position number of the issue you want left in front of the new issue, and <ENTER>.</p> <p>You cannot insert an issue after an expected issue — that is, in the bottom row of a checkin screen.</p> <p>Use this option when you receive an unexpected special issue, or receive an extra copy that you want to check in.</p> |

| | |
|---------------------|--|
| No active copy sets | If all of the serial copy sets that meet the SHIPTO and Type of Holding selection criteria are inactive, you cannot <i>Insert</i> issues. |
| <i>Retrieve #</i> | <p>Displays the CHKM – CHECKIN FOR (SHIPTO CODE - TYPE OF HOLDING) screen to edit or display the issue and copy information for an issue. Enter the position number of the issue you want, and <ENTER>.</p> <p>You cannot retrieve an issue that is after the next-expected issue. For example, you can <i>Retrieve</i> the next-expected basic issue (box 5), but not any later expected basic issues (box 6 or 7 or 8).</p> |
| No active copy sets | If all of the serial copy sets that meet the SHIPTO and Type of Holding selection criteria are inactive, the next-expected issue is still shown but you cannot <i>Retrieve</i> it. |
| <i>Delete #</i> | <p>Deletes the holdings of the non-expected issue you identify by number. Enter the position number then <ENTER>. The system then prompts:</p> <pre>Deleting holdings from a checkin box - Okay to continue?(Y/N)</pre> <p>Answer <i>Y</i> to go ahead and delete, or <i>N</i> to not delete it. (The default is <i>N</i>.)</p> <p>If you answer yes, the system checks to ensure that the parts can be deleted. If no errors are encountered, the system deletes the holdings for the specific SHIPTO from the parts record. If there are holdings for other SHIPTOs in the PARTS record, the box will continue to display but it will show a status of Not expected. This means that there are other holdings for this part on the system but they do not belong to this SHIPTO. If there are no other holdings for this part on the system, the entire box is deleted from the display.</p> <p>Use this option to remove a mis-inserted issue, or an unpublished issue (see the subsection <i>Publication Break</i> on page 3-27).</p> <p>NOTE: Claims on copies of the issue are permanently removed and can no longer be accessed by a copy number (TX) search.</p> |
| <i>Forward</i> | <p>Browses forward to display another screen of issues.</p> <p>Each time you select the <i>Forward</i> option, the system displays another screen of predicted issues. The option line changes — the <i>Insert after #</i>, <i>Retrieve #</i>, and <i>Delete #</i> options are removed. <i>Exit</i> returns you to the first checkin screen (the screen displayed when the <i>Checkin #</i> option was first selected). You may checkin any issue from any predicted issue box.</p> |

Once the issue has been checked in and filed, all previously predicted boxes will be assigned the status of *Item due*. The system redisplay the Checkin screen with the updated box in position 4 and future predicted issues in positions 5 through 8 as applicable.

Backward

Browses backward to display another screen of issues.

Claims

Advances to the CHKM - CLAIMS SUMMARY screen which lists the serial's copy claims for the copy sets that meet the SHIPTO and Type of Holding selection criteria. At that screen you may select a particular claim to display or edit.

Order detail

[Only offered if the library has Acquisitions installed.]

Advances to the CHKM - ORDER SUMMARY DISPLAY screen and displays the purchase orders for the copy sets that meet the SHIPTO and Type of Holding selection criteria. From this screen you can select the line # option to display the CHKM - ORDER DETAIL DISPLAY screen.

Prior screen

Returns to the screen you were at prior to the Checkin screen displaying, i.e., Type of Holding Summary, SHIPTO Selection, or SERIAL COPY SET SUMMARY.

Frequency notes

[Only offered if any of the active publication patterns has a note.]

Advances to the CHKM - FREQUENCY NOTES DISPLAY screen which shows any notes on the active publication patterns.

Copy set notes

[Only offered if any of the copy sets has a note.]

Advances to the CHKM - COPY SET NOTES DISPLAY screen which shows any notes on the copy sets.

MARC

Advances to the BIBLIOGRAPHIC MARC DISPLAY screen which shows the bibliographic record in MARC format.

Summary holdings

Advances to the SUMMARY HOLDINGS STATEMENT [FOR SHIPTO CODE] screen which shows the summary holdings statements for all copy sets with the selected SHIPTO CODE.

| | |
|----------|---|
| Move box | Allows you to change the order of display of the checkin boxes. See <i>Move Box</i> on page 3-57. |
| ? help | Displays a help message for this screen. |
| Exit | Returns to the SERIAL COPY SET SUMMARY screen. |

Reading the Checkin Screen

This screen shows previous and expected issues, in either a list format or box format depending on the choices made for you in the User Defaults (CUDEF) table. The same information is displayed regardless of format.

In the initial display, the top 4 issues show previous issues and the bottom 4 show expected issues. Select the *Backward* option to browse backwards to the preceding 8 previous issues, and then to the 8 before that, and so on. Alternatively, you can select the *Forward* option to browse future issues as determined by the publication pattern.

Box Display

| CHKM - CHECKIN FOR UNIT5 - Paper | | | | MASTER |
|----------------------------------|--|--------------|----------------------|-------------------|
| LCN | :10008609 | Call #: | UNC | ISSN: 0009-5982 |
| Title | :The Chronicle of higher education | | | |
| Imprint | :[Washington, etc., Chronicle of higher e+ | | | LCCN: sf 80001055 |
| ----- | | | | |
| 1 | Vol. 44:No. 20 (FEB) | 2 | Vol. 44:No. 21 (MAR) | 3 |
| | --:18:1998) | | --:04:1998) | |
| | | | | |
| | 05/08/98 | | 03/04/98 | |
| | Received 4/4 | | Item due 4/4 | |
| ----- | | | | |
| 5 | Vol. 44:No. 24 (APR) | 6 | Vol. 44:No. 25 (APR) | 7 |
| | --:15:1998) | | --:29:1998) | |
| | | | | |
| | 04/15/98 | | 04/29/98 | |
| | Exp issue 4/4 | | Exp issue 4/4 | |
| ----- | | | | |
| Options: | | | | |
| Checkin # | Insert after # | Retrieve # | Delete # | Forward |
| Claims | Order detail | Prior screen | Copy set notes | Backward |
| Summary holdings | Move Box # | ? Help | Exit | |

List Display

```

                                CHKM - CHECKIN FOR UNIT5 - Paper                                MASTER
LCN      :10008609  Call #: UNC                                ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+        LCCN: sf 80001055
1. 05/08/98      Vol.44:No.20(FEB:18:1998)
   Received      4/4
2. 03/04/98      Vol.44:No.21(MAR:04:1998)
   Item due      4/4
3. 03/18/98      Vol.44:No.22(MAR:18:1998)
   Item due      4/4
4. 04/01/98      Vol.44:No.23(APR:01:1998)
   Item due      4/4
5. 04/15/98      Vol.44:No.24(APR:15:1998)
   Exp issue     4/4
6. 04/29/98      Vol.44:No.25(APR:29:1998)
   Exp issue     4/4
7. 05/13/98      Vol.44:No.26(MAY:13:1998)
   Exp issue     4/4
8. 05/27/98      Vol.45:No.1(MAY:27:1998)
   Exp issue     4/4
Options:
Checkin #  Insert after #  Retrieve #  Delete #  Forward  Backward
Claims    Order detail    Prior screen  Copy set notes  MARC

```

Highlighting The box or line is highlighted when an issue is expected, or if some of the expected issues are still outstanding. The box or line is **not** highlighted if the issue is fully Received (or has statuses that are treated as Received).

Interpreting the Box Display

The following representation of the box display fields are depicted by repeating letters.

```

.----- .
| B EEEEEEEEEEEEEEE |
| EEEEEEEEEEEEEEE |
| EEEEEEEEEEEEEEE |
| EEEEEEEEEEEEEEE |
| MM/DD/YY          * |
| SSSSSSSSS ##/##+  |
.----- .

```

B

[1 digit]

Issue box's reference number on the screen, from 1 to 8.

EEEE...

[68 char.]

Issue enumeration (volume numbering), and chronology (cover date) predicted by the system and/or entered by a user at the Enumeration/Chronology field of the CHKM -CHECKIN FOR (SHIPTO CODE) - (TYPE OF HOLDING CODE) screen.

MM/DD/YY

[date]

Copy status date.

For expected issues, and issues with any *Item due copies*, this is the receipt date predicted by the system at the *Expected Date* field on the CHKM -CHECKIN FOR (SHIPTO CODE) - (TYPE OF HOLDING CODE) screen.

For other issues, this is the date that the status shown in the box was assigned. (Multiple copy issues may have copies with different statuses but the box shows only one status.) See the copy *DATE* column in the issue's expanded *STATUS* field on the CHECKIN FOR (SHIPTO CODE) - (TYPE OF HOLDING CODE) screen.

- * [asterisk] One or more copies of the issue have notes entered at the *NOTES* field of the CHECKIN FOR (SHIPTO CODE) – (TYPE OF HOLDING CODE) screen.
- SSSSSSSS ##/## + [10 char. code description,
2 digits, “/”, 2 digits]
Copy status, i.e. the Checkin Type Code assigned to a copy of the issue. See the *STATUS* field of the CHECKIN FOR (SHIPTO CODE) – (TYPE OF HOLDING CODE) screen.
The copies of a non-expected issue of a multiple copy set serial may have different statuses but the box can show only one — the first one from the following list: *Received, In Bindery, Missing, Returned, Claimed, Bound, Item due, Withdrawn.* (Use the *Retrieve #* option on the CHECKIN FOR (SHIPTO CODE) – (TYPE OF HOLDING CODE) screen to see all the copy statuses.)
For multiple copy set serials, the box tells you how many copies have the displayed status and how many copies were predicted; for example, *Received 3/3* means all three copies of the item have been “received”. If the copies have different statuses, the system adds a plus sign; for example, *Received 1/3 +* means one of the three copies of the item has been “received” but the other two copies have different status(es).
- No active copy sets If all of the serial copy sets are inactive, the counter is 0/0 for expected issues (because none are really expected).

Displaying Expected Issues

The lower 4 issues shown on the initial checkin screen represent the next issues expected for the serial.

Multiple Publication Patterns

A serial can have multiple publication patterns, including multiple patterns for each Publication Type:

- basic issues, commonly coded ISS
- indexes, commonly coded IND
- supplements, commonly coded SUP

Each publication type is displayed on a separate window. Issues, indexes and supplements do not display together on the same Checkin screen.

Copies Expected
Somewhere within the
Library

```

                                CHKM - CHECKIN FOR UNIT5 - Paper                                MASTER
LCN      :10008609  Call #: UNC                                ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+        LCCN: sf 80001055
-----
|1|Vol. 44:No. 20(FEB|2|Vol. 44:No. 21(MAR|3|Vol. 44:No. 22(MAR|4|Vol. 44:No. 23(APR|
|--:18:1998)          |--:04:1998)          |--:18:1998)          |--:01:1998)
|
|05/08/98            |03/04/98            |03/18/98            |04/01/98
|Received  4/4       |Item due  4/4       |Item due  4/4       |Item due  4/4
-----
|5|Vol. 44:No. 24(APR|6|Vol. 44:No. 25(APR|7|Vol. 44:No. 26(MAY|8|Vol. 45:No. 1(MAY:
|--:15:1998)          |--:29:1998)          |--:13:1998)          |--:27:1998)
|
|04/15/98            |04/29/98            |05/13/98            |05/27/98
|Exp issue  0/0      |Exp issue  0/0      |Exp issue  0/0      |Exp issue  0/0
-----
Options:
Checkin #  Insert after #  Retrieve #  Delete #  Forward  Backward
Claims    Order detail    Prior screen  Copy set notes  MARC
Summary holdings  Move Box #  ? Help  Exit

```

The change in status from Received 1/1 to Exp issue 0/0 indicates that after the April 1st issue, there are no next expected issues for this SHIPTO address. While the copy set is no longer active at this SHIPTO address, there are active copy sets elsewhere within the library where issues are expected. (The status Exp issue 0/0 indicates that the copy set is inactive.)

No Copies Expected
Anywhere in Library

```

                                CHKM - CHECKIN FOR UNIT5 - Paper                                MASTER
LCN      :10008609  Call #: UNC                                ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+        LCCN: sf 80001055
-----
|1|Vol. 44:No. 20(FEB)|2|Vol. 44:No. 21(MAR)|3|Vol. 44:No. 22(MAR)|4|Vol. 44:No. 23(APR)|
|---:18:1998)        |---:04:1998)        |---:18:1998)        |---:01:1998)
|
|05/08/98           |03/04/98           |03/18/98           |04/01/98
|Received  4/4      |Item due  4/4      |Item due  4/4      |Item due  4/4
|-----
|5|                 |6|                 |7|                 |8|
|
|-----
Options:
Checkin #  Insert after #  Retrieve #  Delete #  Forward  Backward
Claims    Order detail  Prior screen  Copy set notes  MARC
Summary holdings  Move Box #  ? Help  Exit

```

Blank boxes indicate that there are no active copy sets for this type of holding anywhere within the library system.

Display Differences for Multiple Copy Sets Received at Different SHIPTO Addresses

When copy sets are sent to more than one SHIPTO address and are received at different times, there appears to be a discrepancy in the number of next expected issues displayed for the different SHIPTO addresses. In the following example, Vol. 44:No.26 (Box 3) was received at UNIT6 on May 11 and Vol. 45:No.1 (Box 4) was received at UNIT6 on May 25. The next expected issue displays in box 5, the usual position. The Vol. 44:No.26 and Vol. 45:No.1 issues at UNIT5 (shown on page 3-25) have not been received. These issues still show as being expected at UNIT5. ADVANCE recognizes the discrepancy in the receipt dates and displays the *correct* next expected issue in box 5. At the same time, the issues that have not yet been received at UNIT5, i.e., those issues in box 3 and 4, are also marked *Exp issue*. It appears that there are more expected issues on the UNIT5 screen than there should be. However, the

system is adjusting the display to accommodate the temporary discrepancy in received issues between the different receiving locations (SHIPTOS).

```

                                CHKM - CHECKIN FOR UNIT6 - Paper                                MASTER
LCN      :10008609  Call #: UNC                                ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+        LCCN: sf 80001055
-----
|1|Vol. 44:No. 24(APR|2|Vol. 44:No. 25(APR|3|Vol. 44:No. 26(MAY|4|Vol. 45:No. 1(MAY:
|--:15:1998)         |--:29:1998)         |--:13:1998)         |--:27:1998)
|
|04/15/98           |04/29/98           |05/11/98           |05/25/98
|Received  1/1      |Received  1/1      |Received  1/1      |Received  1/1
-----
|5|Vol. 45:No. 2(JUN:|6|Vol. 45:No. 3(JUN:|7|Vol. 45:No. 4(JUL:|8|Vol. 45:No. 5(JUL:
|--10:1998)         |--24:1998)         |--08:1998)         |--22:1998)
|
|06/10/98          |06/24/98          |07/08/98          |07/22/98
|Exp issue 1/1     |Exp issue 1/1     |Exp issue 1/1     |Exp issue 1/1
-----
Options:
Checkin #  Insert after #  Retrieve #  Delete #  Forward  Backward
Claims  Order detail  Prior screen  MARC  Summary holdings
Move Box #  ? Help  Exit

```

The next expected issue displays in box 5.

```

                                CHKM - CHECKIN FOR UNIT5 - Paper                                MASTER
LCN      :10008609   Call #: UNC                                ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+           LCCN: sf 80001055
-----
|1|Vol.44:No.24(APR|2|Vol.44:No.25(APR|3|Vol.44:No.26(MAY|4|Vol.45:No.1(MAY:
|--:15:1998)       |--:29:1998)       |--:13:1998)       |--27:1998)
|
|04/15/98         |04/29/98         |05/13/98         |05/27/98
|Received  4/4    |Received  4/4    |Exp issue  4/4   |Exp issue  4/4
-----
|5|Vol.45:No.2(JUN:|6|Vol.45:No.3(JUN:|7|Vol.45:No.4(JUL:|8|Vol.45:No.5(JUL:
|--10:1998)       |--24:1998)       |--08:1998)       |--22:1998)
|
|06/10/98        |06/24/98        |07/08/98        |07/22/98
|Exp issue  4/4   |Exp issue  4/4   |Exp issue  4/4   |Exp issue  4/4
-----
+
Options:
Checkin #  Insert after #  Retrieve #  Delete #  Forward  Backward
Claims  Order detail  Prior screen  Copy set notes  MARC
Summary holdings  Move Box #  ? Help  Exit

```

Next expected issues appear in six boxes. The system moves the issues in boxes 3 and 4 into the *received* row in anticipation of their receipt.

Changing Predictions

Publication Break

There are three ways to handle a jump in the enumeration and/or chronology of a serial without having to add a new publication pattern (which would cause the generation of a separate summary holdings statement).

Next-expected issue If you know ahead of time that an issue is not going to be published, you can wait until it is in the next-expected issue box and then *Retrieve* it and change its enumeration and/or chronology. The system automatically re-predicts later expected issues accordingly.

For example, consider a monthly serial which skips an issue, going from Vol. 22 No. 6 (JUN) to Vol. 22 No. 8 (AUG). You could *Retrieve* the predicted Vol. 22 No. 7 (JUL) issue when it is the next-expected issue and change it to Vol. 22 No. 8 (AUG), and perhaps also add a note to the publication pattern.

Non-expected issue A simpler method of handling an unpublished issue is to *Delete* it once it is no longer in an expected (EXP) issue box.

In the example, you could *Retrieve* the (JUL) issue and mark it *Item due*, or just let the system assign this status automatically when someone *Checks in* the (AUG) issue. Afterward you may *Delete* the (JUL) issue, whenever convenient.

Missing status You could mark all copies of the unpublished issue *Missing*, which would cause an explicit listing of that issue in the summary holdings statement.

However, this approach is not recommended, — a *Missing* status should be assigned only to issues that were published but then lost or never received by the library.

Publication Suspension

If a serial is suspended indefinitely, you could change the copy set status to inactive on the SERIAL COPY SET DETAIL screen so that no further issues are expected by the system. (Use the *Serial copy display* option in Holdings edit to reach the SERIAL COPY SET SUMMARY screen; then use the *item #* option to select a copy set.) In Acquisitions, you could assign a Report Code (with PO status action = backorder) to the serial's order,

and then enter an *EST DELVRY* date (for further action) and a *NOTE*. In Cataloguing, you could add a MARC field containing a note about the suspension.

Changing the Next-Expected Issue

In some cases you may want to change the next-expected issue's enumeration, chronology, or expected receipt date for a specific copy set.

```

                                Online Catalogue - BRIEF DISPLAY          (1 of 1 titles)
Local Control # :10008609
LCCN             :sf 80001055
ISSN            :0009-5982
AUTHOR          :Editorial Projects for Education, Inc.
TITLE           :The Chronicle of higher education
Pub/Size        :Chronicle of higher education, etc.] 43 cm.

LOCATION OF COPIES & PARTS HELD, CHOOSE ONE FOR DETAILS:
1.  ADVLIB Central GENERAL
    Paper: Vol.44:No.24(APR:15:1998)-Vol.45:No.1(MAY:27:1998)
        Last rec'd: Vol.45:No.1(MAY:27:1998) on MAY 11, 1998
2.  ADVLIB Central GENERAL c.1 /Regular print
    Paper: Vol.45:No.1(MAY:01:1998)-Vol.45:No.2(MAY:02:1998)
        Vol.45:No.3(MAY:15:1996)-Vol.46:No.32(MAR:06:1998),
        Vol.46:No.34(MAR:20:1998)-Vol.44:No.16(JAN:02:1998)
        Vol.44:No.17(JAN:09:1998),Vol.44:No.19(FEB:04:1998)-
        Vol.44:No.25(APR:29:1998)
        Last rec'd: Vol.44:No.25(APR:29:1998) on MAY 11, 1998

4 item(s) in list.
Options:
OPAC display  Pieces display  Type of holdings display  Parts display
Pub. pattern display  Locations display  Serial copy display
Check-in serials  Bibliographic edit  Order display  Exit

```

1. From the search screen select *Holdings edit*. The option line changes. Select the *Serial copy display* option. The SERIAL COPY SET SUMMARY screen appears.

```

                                SERIAL COPY SET SUMMARY                                MASTER
LCN      :10008609   Call #: UNC                                ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+           LCCN: sf 80001055

      Physical Location      Collection/Call number/Copy      Vendor      Status
      -----
1.  ADVLIB Central          GENERAL c.1                      FAXON        Claimed
    Notes: Purchase copy
2.  ADVLIB Central          GENERAL c.2                      FAXON        Active
    Notes: Purchase copy
3.  ADVLIB Central          GENERAL c.3                      JW&S        Active
    Notes: Copyright deposit 2nd copy
4.  ADVLIB Central          GENERAL                          FAXON        Active

4 item(s) in list
Options:
# item  Add item  Go to  MARC  Limit list  Quit holdings  ? Help
Exit

```

2. Use the *# item* option to select a copy set. The SERIAL COPY SET
DETAIL screen appears.

```

                                SERIAL COPY SET DETAIL                                MASTER
LCN       :10008609   Call #: UNC                                ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+           LCCN: sf 80001055

1. Location   : AL CENTRAL GENERAL
2. Status    : ACTIVE - Y
3. Current PO# :
4. Actual Cost :
5. Vendor Code : FAXON
6. Ship To   : UNIT6
7. Clm Code  : DFLT
8. Routing ID : STF1
9. Notes     :

Options:
# line  Line by line  Routing list  Binding list  Type of holdings
File   Quit holdings  ? Help      Exit

```

3. Select the *Type of holdings* option. The LINKED TYPE OF HOLDING screen appears.

```

                                LINKED TYPE OF HOLDING                                MASTER
LCN       :10008609   Call #: UNC                                ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+           LCCN: sf 80001055

Description                               Type  Supplement/Index type
-----
1. Paper                                   ISS
Captions/Labels: Vol.:No.:(Month):(Day):(Year)

1 item(s) in list
Options:
# item  Link  Unlink item(s)  Next expected item  File  Limit list
Quit holdings  ? Help      Exit

```

4. Select the *Next expected item* option and enter the line number of the item you want to change. The PUBLICATION PATTERN PREDICTIONS screen appears.

| PUBLICATION PATTERN PREDICTIONS | | MASTER |
|----------------------------------|--|--|
| LCN | :10008609 Call #: UNC | ISSN: 0009-5982 |
| Title | :The Chronicle of higher education | |
| Imprint | :[Washington, etc., Chronicle of higher e+ | LCCN: sf 80001055 |
| 1. Start Enumeration/Chronology: | | |
| Vol. | : 45 (Day) : 10 | |
| No. | : 2 (Year) : 1998 | |
| | (Month): JUN | |
| 2. Start Date | : 06/10/98 | 4. Receipt Delay: 0 |
| 3. Prediction #: | 1 | 5. Claim Delay : 4 |
| Expected Enumeration | | Chronology |
| Date Vol.:No. | | (Month):(Day):(Year) |
| 06-10-98 45:2 | | JUN:10:1998 |
| 06-24-98 45:3 | | JUN:24:1998 |
| 07-08-98 45:4 | | JUL:08:1998 |
| 07-22-98 45:5 | | JUL:22:1998 |
| Options: | | |
| # line | Line by line | Accept Forward Quit holdings ? Help Exit |

5. Edit any of the numbered fields.
 - Changes in Enumeration and Chronology are seen immediately on this screen and on the Checkin screen. Changes begin at the Next expected issue and continue for all future predictions.
 - If you edit the *Start date* field, the date changes for the Next expected issue and future predictions.
 - Changes in the *Receipt Delay* field are reflected in the Next expected issue and all subsequent issues.
6. *Accept* the changes at the PUBLICATION PATTERNS PREDICTION screen and *File* at the LINKED TYPE OF HOLDING screen.

The information in field 1 is shared by all copy sets using this Type of Holding. The next expected information, set up in fields 2–5, is shared by all copy sets with the same SHIPTO as the current copy set. You can set different expected dates for each SHIPTO Code.

Using Defaults to Facilitate Workflow

When you select the *Checkin #* option from the CHKM - CHECKIN FOR (SHIPTO CODE) – (TYPE OF HOLDING CODE) screen, the system might prompt for the number of copies if this selection was made in the USER DEFAULTS (CUDEF) table.

You reach the USER DEFAULTS table by selecting User Defaults (CUDEF) on the SERIALS CONTROL CONTROL MENU (CTLM). The system prompts you for your USER ID before displaying the table.

```

                                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=YES, 0=NO)
4. DEFAULT SHIPTO CODE FOR CHECKIN :

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

Prompt for Copies/Barcodes

Case 1

| | |
|-----------------|--|
| Appropriate for | Single location libraries or libraries with multiple receiving locations (SHIPTOs) where all received copies are for the same location and where serial issues are not barcoded. |
| CUDEF Setting | PROMPT FOR COPIES AT CHECKIN OPTION = 0 PROMPT FOR BARCODE/NOTES AT CHECKIN = 0 |
| System Action | The system checks in (receives) all outstanding (not yet received) copies for the specified box for the copy sets using the specified SHIPTO location and then redisplay the CHKM - CHECKIN FOR (SHIPTO CODE) – (TYPE OF HOLDING CODE) screen. |

Case 2

| | |
|-----------------|---|
| Appropriate for | Libraries that have centralized checkin, where some or all serials will be barcoded on checkin. |
| CUDEF Setting | PROMPT FOR COPIES AT CHECKIN OPTION = 0 PROMPT FOR BARCODE/NOTES AT CHECKIN = 1 |
| System Action | The system displays the PART LOCATION SUMMARY window (see the Part Location Summary on page 3-53) on the CHKM - CHECKIN FOR (SHIPTO CODE) – (TYPE OF HOLDING CODE) screen. Use the <i>Add barcodes</i> option to assign barcodes. |

Case 3

| | |
|-----------------|---|
| Appropriate for | Libraries that have decentralized checkin, where serials are not barcoded during the checkin process. |
| CUDEF Setting | PROMPT FOR COPIES AT CHECKIN OPTION = 1 PROMPT FOR BARCODE/NOTES AT CHECKIN = 0 |
| System Action | <ul style="list-style-type: none">• If the serial title has one copy set with the specified SHIPTO: The system checks in the outstanding copy for the specified box and the redisplay the CHKM - CHECKIN FOR (SHIPTO CODE) – (TYPE OF HOLDING CODE) screen. |

- If the serial title has multiple copy sets with the specified SHIPTO and:
 - a. More than one copy remains to be checked in:

The system prompts for the number of copies to receive and defaults to the number outstanding.

If you accept the default, the CHKM - CHECKIN FOR (SHIPTO CODE) – (TYPE OF HOLDING CODE) screen redisplay with all copies checked in.

If you check in fewer copies than the number remaining, the system displays the PART LOCATION SUMMARY window (see [Part Location Summary](#) on page 3-53) on the CHKM - CHECKIN FOR (SHIPTO) – (TYPE OF HOLDING CODE) screen and you can specify which copies to check in.
 - b. Only one copy remains to be checked in:

The system checks in the remaining copy and then displays the CHKM - CHECKIN FOR (SHIPTO CODE) – (TYPE OF HOLDING CODE) screen with all copies checked in.

Case 4

| | |
|-----------------|--|
| Appropriate for | Libraries that have decentralized checkin, where some or all issues will be barcoded during the checkin process, or where library staff might want to verify the items being checked in. |
| CUDEF Setting | PROMPT FOR COPIES AT CHECKIN OPTION = 1 PROMPT FOR BARCODE/NOTES AT CHECKIN = 1 |
| System Action | The system prompts for the number of copies to receive. Enter the number of copies to check in. The system displays the PART LOCATION SUMMARY window (see Part Location Summary on page 3-53) on the CHKM - CHECKIN FOR (SHIPTO CODE) – (TYPE OF HOLDING CODE) screen. Use the <i>Line by line</i> option to position the cursor at the first RECV field. Enter Y or N. When all the RECV fields are complete the cursor moves to the first BARCODE field. Enter a barcode or <ENTER> to move to the next field. When you have completed all the fields <i>File</i> , the system verifies that the number of copies received equals the number originally specified. If you have checked in fewer copies than specified, the system prompts: Receiving fewer items than specified - Okay to continue?. |

Designating a Default SHIPTO Code

There are two ways to restrict access to Checkin by SHIPTO Code:

- by designating a default SHIPTO Code in USER DEFAULTS
- by using a qualifier to specify a list of valid SHIPTO CODES for permission 108, Check in Serials.

User Defaults

When a default SHIPTO code is specified in the USER DEFAULTS (CUDEF) table, you can bypass the SHIPTO SELECTION screen at Checkin.

```
                                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
```

Restricting Access to Specific SHIPTOs

You can restrict serials checkin to specific SHIPTO codes by specifying qualifiers for Permission 108, *Check in Serials*. Use the UPDATE MODULE ACCESS RECORD in Enter Access Codes (EACC) from the Systems Utility Menu to list the SHIPTO codes that you want used as checkin locations. See the *Utilities Management Guide*.

NOTE: If the user has permissions: 069 – Change current information for holdings, 078 – Add holdings, or 079 – Delete holdings turned on, the system may include copy sets from other SHIPTO locations.

If these permissions are not set, the user may access **only** the copy sets from the SHIPTO locations specified for the Check in serials permission.

Checking in Specific Copies

When you check in multiple copies and you have your system set to prompt for the number of copies to receive, the system displays another window that lists each copy. After choosing the *Line by line* option, the cursor is placed at the first RECV field. Answer Y or N to indicate whether you are checking in this copy. The cursor moves sequentially through all the RECV fields. If your system is set up to prompt for Barcodes the cursor moves sequentially through all the barcode fields. Use the *Notes Update* option to add notes to a specific copy.

NOTE: This screen replaces the CHKM - CHECKIN SPECIFIC COPIES from previous releases.

```

                                CHKM - CHECKIN FOR UNIT5 - Paper                                MASTER
LCN      :10008609   Call #: UNC                                ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+           LCCN: sf 80001055

Checkin of: v.1 :pt.10(98/99:AUG)
-----
|  CAMPUS LIBRARY/COLLECTION   COPY# STATUS   RECV BARCODE   NOTE |
|  1 MAIN BRANCH 1 GEN1                Exp issue   Y           N |
|  2 ADVLIB CENTRAL GENERAL           3 Exp issue   Y           N |
|  3 ADVLIB CENTRAL GENERAL           2 Exp issue   Y           N |
|  4 ADVLIB CENTRAL GENERAL           Exp issue   Y           N |
-----
Vendor: FAXON      PO#: 971100022/0001   Routed: N   Type: FIRMORD-S
Copy Set Notes: THIS COPY SET FOR SHELF DISPLAY .
Do you wish to receive this item?

```

When all fields are answered and you exit the note window, the option line appears. *File* to save changes or select the appropriate option to edit.

Edit Fields

RECV [1 char]

Answer y to check in (receive) this item.

Answer *N* if you do not want to check in (receive) this item.

BARCODE [barcode number, typically 14 digits]

Scan or enter a barcode. If you *File* to leave this screen the system creates a piece record for each barcode that does not already exist in the catalogue.

NOTE [1 char]

Answer *Y* to enter a note for the item that is being received. The system opens a note window that can be edited using the standard window editing options defined in Appendix A.

Answer *N* if a note is not required for this item.

Display Fields

CAMPUS [6 char.]

Online Catalogue description of the copy's Institution Code as defined in the location copy record linked to the copy set.

LIBRARY [text]

Copy's Sublocation Code and collection codes separated by a blank space. These codes are defined in the location copy record linked to the copy set.

COPY# [text]

Copy number. The copy number is defined in the location copy record linked to the copy set.

STATUS [10 char. code description]

Copy status (i.e. the Checkin Type Code assigned to the copy).

NOTE: The following fields display information for the copy that is currently being edited.

VENDOR: [8 characters]

Vendor code for the supplier of this title.

PO #: [10 characters/4 characters]

If this copy was ordered through Acquisitions, the system displays the purchase order and order line number assigned in Acquisitions. If the copy was not ordered through Acquisitions, the system displays the purchase order number assigned to the copy set on the SERIAL COPY SET DISPLAY screen.

ROUTED: [1 character]

Y This copy is routed and a routing slip is produced when issues are checked in.

N This copy is not routed.

TYPE: [13 character]

Order Type code from the Acquisitions order.

COPY SET NOTES Notes defined for this copy set on the SERIAL COPY SET DISPLAY screen.

Screen Options

- | | |
|------------------|---|
| # line | Positions the cursor at the <i>RECV</i> field. Prompts you to receive the item, enter a barcode, and enter notes for the specified line. |
| Line by line | Positions the cursor in the <i>RECV</i> field of line one. Prompts you to receive the item, enter a barcode, and enter notes for each line. |
| Column by column | Positions the cursor in the <i>RECV</i> field of line one. Moves the cursor through all the <i>RECV</i> fields set to Y, then moves the cursor to the <i>BARCODE</i> field of line one. Moves the cursor through all the <i>BARCODE</i> fields that have <i>RECV</i> fields set to Y. Positions the cursor at the <i>NOTE</i> field of line one. Moves the cursor through all the <i>NOTE</i> fields that have <i>RECV</i> fields set to Y. This enables you to add or edit barcodes and notes for the received copies. |
| File | Saves any updates to Checkin History, creates routing slips, pieces, etc., and returns to the Checkin screen. |
| Add barcodes | Positions the cursor at every <i>BARCODE</i> field that has the <i>RECV</i> field set to Y. |
| Notes update | Positions the cursor at every <i>NOTE</i> field that has the <i>RECV</i> field set to Y. When the <i>NOTE</i> field is answered Y, an edit window opens. |

- Forward Scrolls to display the next ten copies in the list.
- Backward Scrolls to display the previous ten copies in the list.

Inserting or Retrieving Issues

When you *Retrieve* or *Insert* an issue on a checkin screen, the system displays the issue's CHECKIN FOR (SHIPTO CODE) – (TYPE OF HOLDING CODE) screen.

Expected Issue

```

                                CHKM - CHECKIN FOR UNIT5 - Paper                                MASTER
LCN      :10008609   Call #: UNC                                ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+           LCCN: sf 80001055

PARTS key : 10004005
1. Type of Holding      : Paper                               8. Title      :
2. Publication Pattern : Vol.:No.:(Mont 9. Copyright Fee :
3. Enumeration/Chronology :                               10. Gregorian Year:
   Vol.      : 45      (Day)   : 16
   No.       : 9       (Year)  : 1998
   (Month): SEP
4. Alternate Enumeration/Chronology :

5. Status      : Exp issue  3/3 ; - 09/16/98
6. Expected Date: 09/16/98
7. Prediction # : 1

Options:
# line  Line by line  File  Status History display  Quit holdings
? Help  Exit

```

On this screen you may examine or edit the issue information (enumeration, chronology, expected receipt date, prediction number) and copy information (status, barcode, notes).

Single or multiple copy sets The screen looks almost the same for single and multiple copy set serials. The only difference is that a multiple copy set issue can have multiple statuses shown in the *Status* field, and a single copy set issue has a single status and the status date shown in that field.

Expected or non-expected issues Slight differences occur in the way Expected issues (boxes from the bottom row of a checkin screen) and Non-expected issues (boxes from the top of the screen) display. The difference appears at the bottom two lines of the screen. The expected issue screen displays *Expected Date*

and *Prediction #* fields; the non-expected issue screen displays *Barcode* and *Nonpublic notes* fields.

If you change the status of an expected issue's copies, the screen changes to look like the one for a non-expected issue.

Inserting an Issue

When you use the *Insert after #* option to insert a new issue, the system displays the CHECKIN FOR (SHIPTO CODE) – (TYPE OF HOLDING CODE) screen. The fields default to the values from the box you specified when you used the insert option. Thus if you inserted after box 3, the system copies the values from the fields for box 3, and reproduces them on a new screen. The cursor appears in the *Type of Holding* field but the option line does not display until you have completed or skipped over all the fields. (You can go directly to the option line by typing space <ENTER> at one of the fields.)

The default copy statuses are *Received* and the copy dates have today's date. You cannot insert an issue with copies expected in the future.

Non-expected Issue

```
                CHKM - CHECKIN FOR UNIT5 - Paper                MASTER
LCN       :10008609   Call #: UNC                               ISSN: 0009-5982
Title     :The Chronicle of higher education
Imprint   :[Washington, etc., Chronicle of higher e+         LCCN: sf 80001055

PARTS key : 10004002
1. Type of Holding      : Paper                               8. Title           :
2. Publication Pattern : Vol.:No.:(Mont 9. Copyright Fee :
3. Enumeration/Chronology :                               10. Gregorian Year:
    Vol.   : 45      (Day)   : 05
    No.    : 6       (Year)  : 1998
    (Month): AUG
4. Alternate Enumeration/Chronology :

5. Status : Received    3/3 ; - 05/12/98
6. Barcode:
7. Nonpublic notes:

Options:
# line  Line by line  File  Status History display  Quit holdings
? Help  Exit
```

Editing Inserted or Retrieved Issues

From this screen you can:

- Edit or change the publication pattern
- Change the status of an issue
- Change the enumeration for an issue which changes the current field and future predictions
- Edit the chronology for the current issue
- Add barcodes
- Add notes

```

                                CHKM - CHECKIN FOR UNIT5 - Paper                                MASTER
LCN      :10008609   Call #: UNC                                ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+           LCCN: sf 80001055

PARTS key : 10004005
1. Type of Holding      : Paper                               8. Title                :
2. Publication Pattern  : Vol.:No.:(Mont 9. Copyright Fee      :
3. Enumeration/Chronology :                               10. Gregorian Year:
    Vol.      : 45      (Day) : 16
    No.       : 9       (Year) : 1998
    (Month): SEP
4. Alternate Enumeration/Chronology :

5. Status              : Exp issue  3/3 ; - 09/16/98
6. Expected Date: 09/16/98
7. Prediction # : 1

Options:
# line  Line by line  File  Status History display  Quit holdings
? Help  Exit

```

Edit Fields

1. *Type of Holding* [Defaults to the Type of Holding, or C]
 You should not have to change this field.

C Allows you to edit the TYPE OF HOLDING DETAIL screen.

2. *Publication Pattern* [Defaults to the pattern in use, ?? or C.]
- ?? Displays the PUBLICATION PATTERN SUMMARY screen which lists all the existing publication patterns already defined for the specified Type of Holding for this title. The pattern in use is identified by a double asterisk.
 - C Displays the PUBLICATION PATTERN DETAIL screen of the current publication pattern and allows you to edit the current definition.
3. Enumeration/
Chronology [Defaults to system predicted enumeration/chronology]
- Contains issue enumeration (volume numbering) and is either predicted by the system or entered by a user at this field. If you edit the enumeration of the next expected issue, the system changes the current field and future predictions.
- Contains issue chronology (cover date) and is either, predicted by the system or entered by a user at this field. If you edit the chronology of the next expected issue the date changes for the current issue only and does not affect predictions or previous issues.
4. Alternate
Enumeration/
Chronology [Not accessible unless the field has been previously defined]
- If an alternate enumeration/chronology has not been defined in the publication pattern, you cannot select this field. Alternate enumeration/chronology patterns are defined on the second screen of the PUBLICATION PATTERN DETAIL screen. Up to 2 alternate levels of enumeration and one level of alternate chronology can be specified.

5. STATUS [10 char. code description,
 ###/### 2 digits, “/”, 2 digits,
 - MM/DD/YY date]

Statuses, that is Checkin Type Codes, assigned to copies of the issue for the specified SHIPTO. The numbers following each status tell you the number of copies which have that status and the total number of copies. Multiple statuses are shown (in code table sequence) if different copies have different statuses. For single copy set issues, the status date is shown after the numbers.

Examples of How Statuses Display

```
Examples:
5-copy issue with all 5 copies received
5. STATUS      : Received      5/5

5-copy issue with 2 copies received, 1 copy returned, and 2 copies claimed
5. STATUS      : Received      2/5 Returned  1/5 Claimed   2/5

single-copy issue with the copy received
5. STATUS      : Received      1/1; - 07/22/91
```

To assign a status to a copy, enter a numeric Checkin Type Code as previously defined in CHKT - CHECKIN TYPE (see *Serials Management Guide*.) The codes are listed in table order. (The code descriptions at your library may be different than the ones shown.)

1 - Received

The library has received an issue for this copy set. If you check in an issue on a checkin screen, the system automatically assigns this status to all active copies of the issues.

The system prints a routing list slip if required. If you change the copy's status from Claimed to Received, the system inactivates the claim and removes it from the CHKM - CLAIMS SUMMARY list.

2 - Returned

The library received this copy but then returned it to the vendor.

3 - Claimed

The library has created a claim for this copy. If the claim is active, the system can generate claim letters (or at least report the need for them) on a regular schedule based on the copy set's Claim Code.

The system can automatically generate claims (or at least report the need for them) for late `Exp` and `Item due` copies. See the *Claims* on page 2-15 for an overview, and a description of the `CHKM - CLAIMS SUMMARY` and `CHKM - CLAIM DETAILED DISPLAY` screens.

You can create a claim by assigning the `Claimed` status to a copy here. When you assign this status and `<ENTER>`, the `CHKM - CLAIM DETAILED DISPLAY` screen is shown.

There you can assign a Claim Message Code, an action date, and a claim note. But if you use *Exit* instead of *File* to leave that screen and return here, the claim is not created and the copy's status defaults to `Received`.

If the claim already exists, you can access its `CHKM - CLAIM DETAILED DISPLAY` screen from here by placing the cursor on the `Claimed` copy line and `<ENTER>`.

To remove the claim, assign a different status (such as `Received` or `Missing`) to the copy. The system automatically inactivates the claim and removes it from the `CHKM - CLAIMS SUMMARY` list. This "historic" claim can no longer be updated although it can still be accessed via a `TX` search.

If you later set the copy status back to `Claimed`, the historic claim comes back to life. NOTE: If you *Delete* an issue, all its claims are permanently removed.

4 - Exp issue

5 - Exp index

6 - Exp suppl

The library expects receipt of one copy for every Type of Holding linked to every active copy set of the serial.

The `Exp` statuses can only be assigned by the system, to issues that it has predicted. (Expected issues are shown in the bottom row of the checkin screens.)

If you `Received` some copies of an issue but still expect the others, assign the `Item due` status to them.

7 - Missing

The library no longer expects receipt of this copy.

If you change the copy's status from `Claimed` to `Missing`, the system inactivates the claim and removes it from the `CHKM - CLAIMS SUMMARY` list.

8 - In Bindery

The library has sent this received copy to be bound. If you change a Received copy's `IN BINDERY` flag from `N` to `Y` at the `BINDING LIST` screen, then the system assigns this status. (Select the *Binding list* option on the `SERIAL COPY SET DETAIL` screen to obtain the `BINDING LIST` screen.) You can also assign the status manually when you use the *Retrieve* option from the `Checkin` screen.

9 - Bound

This received copy has been bound. If you change the copy's `IN BINDERY` flag from `Y` to `N` at the `BINDING LIST` screen, then the system assigns this status. (Select the *Binding list* option on the `SERIAL COPY SET DETAIL` screen to obtain the `BINDING LIST` screen.) You can also assign the status manually when you use the *Retrieve* option from the `Checkin` screen.

10 - No action

The system removes this copy line from the issue definition when you *File* the checkin screen. This status can be assigned at any time.

For example, if you get 5 copies of an issue of a 4-copy set serial, you would `Receive` the first 4 of them against the supplied issue box (1 copy against each copy set).

In addition, you could *Insert* an extra issue box with the same enumeration and chronology as the original issue box, and then `Receive` the 5th copy against 1 of the copy sets and set the other 3 copy lines to `No action`.

The original issue would show the summary status `Received 4/4`; the inserted issue would show the summary status `Received 1/1`.

You might also use the `No action` status if you discover you have claimed issues that will never be published.

11 - Item due

The library expects receipt of this copy. This status is more or less equivalent to the `Exp` status.

Use this status when you do not receive all the expected copies of an issue and do not want to mark the remainder as `CLAIMED` or `MISSING`. The system automatically generates claims (or at least reports the need for them) for late `EXP` and `ITEM DUE` copies.

NOTE: If you want to change the expected receipt date of the `ITEM DUE` copies, do so **before** you change the issue's overall `EXP` status. (To change the date, edit the `EXPECTED DT` field.)

12 - Withdrawn

This received copy is withdrawn.

13 - Microfilm

14 - Microfiche

Use this status to denote that the library has holdings on microfilm or microfiche. First delete all checkin boxes for the paper issues that were transferred to microfilm or microfiche. Then insert a checkin box with identifying information entered into the `ENUMERATION/CHRONOLOGY` field (e.g. 1993-1994) and with a status of `MICROFILM` or `MICROFICHE`.

15 - 20 - Optional 1-6

Library definable. The system administrator can define statuses such as *Not published*, *In process*, and so forth in `CHKT - Checkin Type code table`.

21 - Not expected

The part is not expected by the copy sets at the selected `SHIPTO` location.

- | | |
|--------------------|--|
| 6. Barcode | Opens an additional window. See Part Location Summary on page 3-53. |
| 7. Nonpublic notes | Opens an additional window. See Part Location Summary on page 3-53. |
| 8. Title | [text] Enter a title for the part. The title is displayed on the Parts Summary screen. |
| 9. Copyright Fee | [14 characters] Enter the copyright article fee code as defined in the 018 field. This field contains the unique identification code for component parts appearing in |

monographs and serials. For a complete description see the USMARC Bibliographic manual, tag 018. Exported in the 852 \$s.

10. Gregorian Year [14 characters]

This information is not used by the system. Enter the converted Gregorian year, if necessary. Corresponds to subfield n of the USMARC 863/4/5 fields.

Expected Issue Screen

Expected issues (from the bottom row of a checkin screen) have a slightly different screen than the one for non-expected issues. The expected issue screen has fields for the expected receipt date and prediction number; the non-expected issue screen has fields for barcode and notes instead.

```

                                CHKM - CHECKIN FOR UNIT5 - Paper                                MASTER
LCN      :10008609   Call #: UNC                                ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+           LCCN: sf 80001055

PARTS key : 10004005
1. Type of Holding      : Paper      8. Title      :
2. Publication Pattern : Vol.:No.:(Mont 9. Copyright Fee :
3. Enumeration/Chronology :          10. Gregorian Year:
   Vol.   : 45          (Day)   : 16
   No.    : 9          (Year)  : 1998
   (Month): SEP
4. Alternate Enumeration/Chronology :

5. Status      : Exp issue  3/3 ; - 09/16/98
6. Expected Date: 09/16/98
7. Prediction # : 1

Options:
# line  Line by line  File  Status History display  Quit holdings
? Help  Exit

```

6. Expected Date [date]

[Only shown for expected issues – otherwise the *BARCODE* field is shown.]

Date that receipt of copies of the issue is expected. This date is predicted by the system for issues whose publication pattern is set for autoprediction. You can change this date for expected issues only.

7. Prediction # [2 digits]

[Only shown for expected issues – otherwise the *NOTES* field is shown.]

The occurrence number of the issue within the month.

For example, if this is the second issue of April of a semimonthly serial, then the value here is 2. This number is assigned by the system for issues whose publication pattern is set for autoprediction.

The only time you might use this field is if the serial suspends publication (i.e. there is a “non-gap break” in the enumeration and chronology) and you edit the next-expected issue’s expected date, enumeration, and chronology accordingly. Then, if the serial resumes with a **different** issue of the month, you would change the *PREDICT’N #* field as well.

Screen Options

- File* Saves any changes you made on this screen and returns to a checkin screen. The system creates piece records for any copies you Received and assigns barcode numbers.
- Line by line* Accesses all the fields for you to edit, one after another, starting with the first one on the screen.
- # line* Accesses a field for you to edit. Specify the field by its line number.
- Status history display* Allows you to track the status changes made to a copy. The system stores the changed status (Checkin Type), the ID of the operator who made the change, and the date and time of the change for each status change made to a copy.
- When you select the *Status History display* option, the system displays a new window on the CHKM - CHECKIN FOR (SHIPTO CODE) - (TYPE OF HOLDING CODE) screen that includes one line for each status change that has occurred on each copy.

```

                                CHKM - CHECKIN FOR UNIT5 - Paper                                MASTER
LCN      :10008609   Call #: UNC                                ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+           LCCN: sf 80001055

PARTS key : 10004005
1. Type of Holding      : Paper                               8. Title           :
2. Publication Pattern : Vol.:No.:(Mont 9. Copyright Fee :
3. Enumeration/Chronology :                               10. Gregorian Year:
    Vol.   : 45      (Day)  : 16
    No.    : 9       (Year) : 1998

-----
|          CAMPUS LIBRARY   COPY# STATUS   USERID   DATE       TIME
|  1. ADVLIB CENTRAL      3      Exp issue
|  2. ADVLIB CENTRAL      2      Exp issue
|  3. ADVLIB CENTRAL      1      Exp issue
|-----

Options:
Forward  Backward  ? Help  Exit
    
```

When the new display window appears, the options change to:

- Forward, Backward* Browses forward or backward to display another screen of status history.
 - ? help* Displays a help message for the status history function.
 - Exit* Returns to the previous display.
- ? help* Displays a help message about this screen.
- Exit* Discards any changes you made on this screen and returns to a checkin screen.
- If you *Claimed* a copy and thus created a new claim, the system does not save the claim, but if you updated an existing claim from here, the claim changes are kept. If you came to this screen by *Inserting* an issue, the system does not save the new issue box.

Part Location Summary

The Part Location Summary Window screen appears when the *Status*, *Barcode*, or *Nonpublic notes* fields are selected. The system displays a list of all the copies of the issue for the specified SHIPTO location.

```

                                CHKM - CHECKIN FOR UNIT5 - Paper                                MASTER
LCN      :10008609   Call #: UNC                                ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+           LCCN: sf 80001055

PART NUMBERING: Vol.45:No.9(SEP:16:1998)
-----
|  CURRENT LOCATION  STATUS      DATE      BARCODE      NOTES |
|  1 AL CENTRAL      4 - Exp issue  09/16/98                                     N   |
|  GENERAL c.3                                             |
|  2 AL CENTRAL      4 - Exp issue  09/16/98                                     N   |
|  GENERAL c.2                                             |
|  3 AL CENTRAL      4 - Exp issue  09/16/98                                     N   |
|  GENERAL c.1                                             |
|-----|
Options:
# line  Line by line  Location add  Column by Column  Accept
Add Barcodes  Notes Update  Forward      Backward  ? Help  Exit
    
```

CURRENT LOCATION [Display only]

Displays the location where the title is held.

STATUS [2 digit code, "-", 10 char. code description]

To assign a status to a copy, enter a numeric Checkin Type Code as previously defined in CHKT - CHECKIN TYPE (see *Serials Management Guide*.) The codes are listed in table order. (The code descriptions at your library may be different than the ones shown.)

DATE [System assigned date]

ADVANCE automatically records the date the issue was received or the date when the status was changed by the user.

| | |
|------------------|---|
| BARCODE | <p>[barcode number, typically 14 digits]</p> <p>Scan or type in a barcode number. If you use <i>File</i> to leave the checkin screen, the system creates a piece record for each barcode that does not already exist in the Catalogue.</p> <p>The creation of the piece record does not depend on the previous or current status of the checkin issue.</p> <p>The same barcode number can be used several times providing that the part belongs to the same location, same title, and the issue does not have an existing barcode attached to it.</p> <p>The piece record is created with a link to the copy's part record and the location copy record which includes the following fields: <i>Institution, Bldg/subloc, Collection, Call# Prefix, Call Number, Copy Number, Call# Suffix, Actual Cost, and Current PO#.</i></p> <p>The new piece is assigned the status <i>In Processing.</i></p> |
| NOTES | <p>[Y or N]</p> <p>Copy notes. If an issue has any copy notes, an asterisk is shown on the right side of the issue box on a checkin screen. See the Copy Notes Display Screen on page 3-55.</p> |
| Options | <p>Refers to options on the Part Location Summary screen.</p> |
| # line | Accesses the line specified. |
| Line by line | Accesses all numbered fields. |
| Location add | Displays the LOCATION COPY SELECTION screen from which you can select a location. |
| Column by column | Allows you to update the Status column, the Date (only if next expected), Barcode and Notes column. |
| Accept | Saves your changes (if any) and exits the screen. |
| Add barcodes | Allows you to edit the barcode information. |
| Notes update | Positions you at the Notes column if you type Y or if you are at a field marked Y and <Enter>, the notes screen appears. |
| Forward | Browses forward to the next screen of information. |

- Backward Browses backward to the next screen of information.
- ? Help Displays library-specific help for the screen.
- Exit Exit the screen without saving changes.

Copy Notes Display Screen

The copy notes display appears when you answer Y in the Notes column or when you select the *Notes update* option from the Status Window screen.

```

                                CHKM - CHECKIN FOR UNIT5 - issue                                MASTER
LCN      :10009894  Call #:                                ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+    LCCN:

Current Location : AL CENTRAL GENERAL
1. Public note   : Available in Reserve Book Room only.

2. Nonpublic note: Send to bindery Jan 15.

3. Physical cond.:

Options:
# line   Line by line   Accept   Quit holdings   ? Help   Exit

```

- 1. *Public note* [text]
An additional window can be opened from this field. Corresponds to subfield z of the USMARC 863/4/5 fields.
- 2. *Nonpublic note* [text]
An additional window can be opened from this field. Corresponds to subfield x of the USMARC 863/4/5 fields.
- 3. *Physical cond.* [text]

An additional window can be opened from this field. Corresponds to subfield q of the USMARC 863/4/5 fields.

Move Box

Use the *Move box* option to change the order of display of the checkin boxes (or the checkin list) on the CHECKIN FOR (SHIPTO CODE) – (TYPE OF HOLDING CODE) screen.

NOTE: You cannot move a box if the status assigned to it is *Expected*. Also you cannot drop a box into an “expected location”.

Procedure

Select the *Move box* option from the Checkin screen.

Enter the number of the box or list item you want to move.

```

                                CHKM - CHECKIN FOR UNIT5 - Paper                                MASTER
LCN      :10008609  Call #: UNC                                ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+        LCCN: sf 80001055
-----
|1|Vol. 45:No. 5(DEC:|2|Vol. 45:No. 6(AUG:|3|Vol. 45:No. 7(AUG:|4|Vol. 45:No. 8(SEP:|
|--22:1998)          |--05:1998)          |--19:1998)          |--02:1998)
|
|05/12/98          |05/12/98          |05/12/98          *|05/12/98
|Received  3/3     |Received  3/3     |Received  3/3     |Received  1/3 +
|-----
|5|Vol. 45:No. 9(SEP:|6|Vol. 45:No. 10(SEP|7|Vol. 45:No. 11(OCT|8|Vol. 45:No. 12(OCT|
|--16:1998)         |--:30:1998)         |--:14:1998)         |--:28:1998)
|
|09/16/98         |09/30/98         |10/14/98         |10/28/98
|Exp issue  3/3   |Exp issue  3/3   |Exp issue  3/3   |Exp issue  3/3
|-----
Options:
Checkin #  Insert after #  Retrieve #  Delete #  Forward  Backward
Claims  Order detail  Prior screen  Copy set notes  MARC
Summary holdings  Move Box #  ? Help  Exit

```

The option line changes and the system highlights the *Drop before box #* option.

Enter the number of the box or item that will follow the box or item you are inserting. For example, if you are inserting the box before box 7, enter 7. <ENTER>

The system inserts the box or item in the location specified.

```

                                CHKM - CHECKIN FOR UNIT5 - Paper                                MASTER
LCN      :10008609  Call #: UNC                                ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+          LCCN: sf 80001055
-----
|1|Vol. 45:No. 5(DEC:|2|Vol. 45:No. 6(AUG:|3|Vol. 45:No. 7(AUG:|4|Vol. 45:No. 8(SEP:|
|--22:1998)          |--05:1998)          |--19:1998)          |--02:1998)
|
|05/12/98          |05/12/98          |05/12/98          *|05/12/98
|Received  3/3    |Received  3/3    |Received  3/3    |Received  1/3 +
-----
|5|Vol. 45:No. 9(SEP:|6|Vol. 45:No. 10(SEP:|7|Vol. 45:No. 11(OCT:|8|Vol. 45:No. 12(OCT:|
|--16:1998)         |--:30:1998)         |--:14:1998)         |--:28:1998)
|
|09/16/98         |09/30/98         |10/14/98         |10/28/98
|Exp issue  3/3   |Exp issue  3/3   |Exp issue  3/3   |Exp issue  3/3
-----
Options:
Drop before Box #  Forward  Backward  ? Help  Exit

```

Move Box Options

Forward, Backward Browses forward or backward to display another screen of issues.

? help Displays a help message for the move box option.

Exit Returns to the Checkin screen.

Frequency Notes Display

To access a serial's CHKM - FREQUENCY NOTES DISPLAY screen, select the *Frequency notes* option on a serial's checkin screen. If none of the serial's active publication patterns has a note, the option is not offered.

The screen shows notes for only the active publication patterns that have notes.

```

                                CHKM - FREQUENCY NOTES DISPLAY                                MASTER
LCN      :10008609   Call #: UNC                                ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+           LCCN: sf 80001055

NOTES:
      Extra issue in October.

Options:
Forward  ? Help  Exit

```

Screen Options

- Forward* Browses forward to display another screen of notes.
- ? help* Displays a help message for this screen.
- Exit* Returns to a checkin screen.

Display Fields

- NOTES* [Only shown if there is an active publication pattern with a frequency note.]
- [multiple lines of char.]

Frequency note about the issues (issue, index, or supplement) publication pattern, from the *FREQUENCYNOTES* field of the pattern's PUBLICATION PATTERN SECOND SCREEN.

The Frequency Notes displayed depend on the Type of Holding that you are checking in. For example, if you are checking in supplements, you see the Frequency Notes for supplements. In other words, you will not see all the Frequency Notes for issues, supplements, and indexes together on one screen. You only see the Frequency notes for the type of holding you selected.

Copy Set Notes Display

To access a serial's CHKM - SERIAL COPY SET NOTES DISPLAY screen, select the *Copy set notes* option on a serial's checkin screen. If none of the serial's copy sets has a note, the option is not displayed.

The screen shows notes for both active and inactive copy sets.

```

                                CHKM - SERIAL COPY SET NOTES DISPLAY                                MASTER
LCN      :10008609   Call #: UNC                                ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+           LCCN: sf 80001055

    CAMPUS LIBRARY   COLLECTION/CALL NUMBER                                COPY #
1.  ADVLIB CENTRAL  GENERAL/                                           1
    Note: Purchase copy
2.  ADVLIB CENTRAL  GENERAL/                                           2
    Note: Purchase copy
3.  ADVLIB CENTRAL  GENERAL/                                           3
    Note: Copyright deposit 2nd copy

Options:
Forward  ? Help  Exit

```

Screen Options

Forward Browses forward to display another screen of notes.

? help Displays a help message for this screen.

Exit Returns to a checkin screen.

Display Fields

Sequence Copy sets are listed in the same order that they were created for the serial.

Skipped copy sets Copy sets without notes are skipped.

| | |
|-------------------------------------|--|
| <i>Note</i> | <p>[Only shown if there are copy set notes.]</p> <p>[multiple lines of char.]</p> <p>Copy Set notes are entered:</p> <ul style="list-style-type: none">• in the <i>Notes:</i> field on the SERIAL COPY SET DETAIL screen.• in the <i>PROCESS'G NOTE</i> field of Acquisition's ORD - NOTES screen, and transferred to Serials by the Acquisitions Transfer job. <p>Notes can be printed on Routing Slips, depending on how the slip has been defined (see the <i>Serials Management Guide</i>).</p> |
| CAMPUS | <p>[6 char.]</p> <p>Online Catalogue description of the copy's Institution Code as defined in the location copy record linked to the copy set.</p> |
| LIBRARY | <p>[text]</p> <p>Copy's Sublocation Code. This code is defined in the location copy record linked to the copy set.</p> |
| <i>COLLECTION / CALL NUMBER</i> | <p>[text]</p> <p>Copy set's Collection Code (if any) and call number (if any), separated by a slash. These codes are defined in the location copy record.</p> |
| COPY# | <p>[text]</p> <p>Copy number. The copy number is defined in the location copy record linked to the copy set.</p> |

MARC Bibliographic Display

To access a serial's BIBLIOGRAPHIC MARC DISPLAY screen, select the *MARC* option on a serial's checkin screen.

The screen shows the bibliographic record in MARC format.

```

                                BIBLIOGRAPHIC MARC DISPLAY

Local Control # : 10008609      Transaction type : Main Produce
Last updated   : 12 JUN 1997 Leader      : cas  2
Format type    : Serials

008      750817c19669999dcuwxlpe      0  a0eng d
010 BB a sf 80001055
        z sc 77001100
012 BB a 33-7s9706120508-p----- 111
022 0B a 0009-5982
032 BB a 560640
        b USPS
035 BB a (OCoLC)1554535
035 BB a (DNLM)C20560000(s)
037 BB b Chronicle of Higher Education, Department E, 1255 23rd St., N.W.,
        Washington, D.C. 20037
040 BB a MnMULS

Options:
Forward  Backward  Leader  Fixed field tag  ? Help  Exit

```

Screen Options

- Forward, Backward* Browses forward or backward to display another screen of tags.
- Leader* Advances to the MARC FIXED FIELDS screen for a detailed display of the MARC record leader.
- Fixed field tag* Advances to the MARC FIXED FIELDS screen for a detailed display of the fixed length MARC field you identify by tag. Enter the tag number (e.g. 008, or simply 8), and <ENTER>.
- ? help* Displays a help message for this screen.

Exit

Returns to a checkin screen.

Display Fields

For a description of the information shown in the BIBLIOGRAPHIC MARC DISPLAY screen and MARC FIXED FIELDS screens, see the *Cataloguing User's Guide*.

Holdings Statement

To access a copy set's SUMMARY HOLDINGS STATEMENTS FOR (SHIPTO CODE) screen, select the *Summary holdings* option on a checkin screen. The screen shows the summary holdings statement for each of the serial's copy sets that has the selected SHIPTO Code. Information is shown for both active and inactive copy sets.

For the serial's copy holdings list (checkin history), access the CHKM - SERIAL HOLDING screen instead.

In the sample screen, three screens were needed to show all the holdings statements. The *Forward* option takes you from one to the next.

| SUMMARY HOLDINGS STATEMENTS FOR UNIT5 | | | USER1 |
|--|--|------------------------|-------------------|
| LCN | :10008609 | Call #: UNC | ISSN: 0009-5982 |
| Title | :The Chronicle of higher education | | |
| Imprint | :[Washington, etc., Chronicle of higher e+ | | LCCN: sf 80001055 |
| CAMPUS | LIBRARY | COLLECTION/CALL NUMBER | COPY # |
| 1. ADVLIB | CENTRAL | GENERAL/ | 1 |
| Library holds: | | | |
| Paper: Vol. 43:No. 49 (AUG:22:1997)-Vol. 44:No. 4 (SEP:26:1997), | | | |
| Vol. 44:No. 6 (OCT:10:1997), Vol. 44:No. 8 (OCT:24:1997) - | | | |
| Vol. 44:No. 19 (JAN:23:1998), Vol. 44:No. 21 (FEB:06:1998) | | | |
| 2. ADVLIB | CENTRAL | GENERAL/ | 2 |
| Library holds: | | | |
| Paper: Vol. 43:No. 49 (AUG:22:1997), Vol. 44:No. 2 (SEP:12:1997) - | | | |
| Vol. 44:No. 4 (SEP:26:1997), Vol. 44:No. 6 (OCT:10:1997), | | | |
| Vol. 44:No. 9 (OCT:31:1997) - Vol. 44:No. 21 (FEB:06:1998) | | | |
| Options: | | | |
| Forward | ? Help | Exit | |

There are two types of holdings statements: retrospective and system generated.

The system builds a holdings statement based on which parts are held at a location.

You can add a note describing retrospective holdings that will display before the holdings statement generated (built) by the system. In some cases you may want to suppress the display of the system generated

holdings by entering a manual override note into the holdings statement. The retrospective note and manual override note can be applied at either the Type of Holding or Publication Pattern levels.

Within the Type of Holding category, items are displayed in chronological order. Enumeration and chronology levels are separated by a colon. Non-gap and gap breaks are indicated by a semicolon and comma respectively. A continuous range is separated by a dash if the library has chosen to compress holdings.

Holdings

To access the CHKM - SERIAL HOLDING screen, select the *Holdings* option at the serial's SERIAL COPY SET SUMMARY screen.

The screen shows the copy holdings information (checkin history), if any, for one or more copy sets.

For summary holdings statements, see the SUMMARY HOLDINGS STATEMENTS screen instead. This screen is described in the preceding section.

Specific or
multiple copy
sets

When you select *Holdings* for a multiple copy set serial, you can either specify a particular copy set (by line number) or ask for all copy sets (<ENTER> without entering a line number). If a specific copy set is shown, the holdings screen has two extra fields, *CAMPUS* and *LIBRARY*, and has a *COPY#* field in place of *TOTAL COPIES*.

| CHKM - SERIAL HOLDING | | MASTER | |
|------------------------|---|--------------------|-------------|
| LCN | :10008609 Call #: UNC | ISSN: | 0009-5982 |
| Title | :The Chronicle of higher education | | |
| Imprint | : [Washington, etc., Chronicle of higher e+ | LCCN: | sf 80001055 |
| TOTAL COPIES: 4 | | | |
| ENUMERATION/CHRONOLOGY | | CAMPUS COPY STATUS | DATE |
| 1. | Vol.44:No.22(FEB:13:1998) | ADVLIB 3 Exp issue | 02/13/98 |
| 2. | Vol.44:No.22(FEB:13:1998) | ADVLIB 2 Exp issue | 02/13/98 |
| 3. | Vol.44:No.22(FEB:13:1998) | ADVLIB 1 Exp issue | 02/13/98 |
| 4. | Vol.44:No.22(FEB:13:1998) | ADVLIB 4 Exp issue | 02/13/98 |
| 5. | Vol.44:No.21(FEB:06:1998) | ADVLIB 3 Received | 05/05/98 |
| 6. | Vol.44:No.21(FEB:06:1998) | ADVLIB 2 Received | 05/05/98 |
| 7. | Vol.44:No.21(FEB:06:1998) | ADVLIB 1 Received | 05/05/98 |
| 8. | Vol.44:No.21(FEB:06:1998) | ADVLIB 4 Received | 05/05/98 |
| 9. | Vol.44:No.20(JAN:30:1998) | ADVLIB 3 Received | 05/04/98 |
| 10. | Vol.44:No.20(JAN:30:1998) | ADVLIB 2 Received | 05/04/98 |
| Options: | | | |
| Forward | Backward | ? Help | Exit |

Screen Options

Forward, Backward

Browses forward or backward to display another screen of copy holdings.

? *help* Displays a help message for this screen.

Exit Returns to the CHKM - SERIAL COPY SET SUMMARY screen.

Display Fields

Copy sequence Copies are listed in reverse chronological sequence, starting with the most recent issue checkin box on a checkin screen.

The sequence of issues (boxes on a checkin screen) and the sub-sequence of each issue's copies (at the Detailed checkin screen), together determine the copy holdings sequence here. If you *Insert* an issue box there, its copies will be inserted in the copy list here.

Copies of expected issues are included in the copy holdings list only if these issues are listed among issues that have statuses other than next expected. That is, the system does not list all future next expected issues.

CAMPUS [6 char.]
Online Catalogue description of the copy's Institution Code as defined in the location copy record linked to the copy set.

LIBRARY [text]
Copy's Sublocation Code. This code is defined in the location copy record linked to the copy set.

COLLECTION /
CALL NUMBER [text]
Copy set's Collection Code (if any) and call number (if any), separated by a slash. These codes are defined in the location copy record.

COPY# [text]
Copy number. The copy number is defined in the location copy record linked to the copy set.

Columnar Display

ENUMERATION /
CHRONOLOGY [text]
Copy's enumeration (volume numbering) and chronology (cover date). Enumeration and chronology labels are defined on the Publication Pattern screen.

| | |
|------------|---|
| CAMPUS | [6 char.] Online Catalogue description of the copy's Institution Code as defined in the location copy record linked to the copy set. |
| COPY# | [text] Copy number. The copy number is defined in the location copy record linked to the copy set. |
| STATUS - # | [10 char. code description; 1 digit] Copy status (i.e. the Checkin Type Code assigned to the copy) and, if the copy is <code>CLAIMED</code> , the number of times a claim letter has been generated. The number is preceded by a hyphen. For explanations of the status codes, see the <i>STATUS</i> field description for the Inserting or Retrieving Issues on page 3-41. |
| DATE | [date] Copy status date — when the status shown was assigned. (For <code>CLAIMED</code> copies, this is the original claim creation date.) |

Claims

The two claims screens, CHKM - CLAIMS SUMMARY and CHKM - CLAIM DETAILED DISPLAY screen, are described in this section.

For an overview of claiming, see [Claims](#) on page 2-15. The *Serials Management Guide* describes the Claims Function, which allows you to display and edit the Claim Letter Review List and to print claim letters for a particular vendor.

For instructions on assigning the Claimed status to a copy of a serial, see [Editing Inserted or Retrieved Issues](#) on page 3-43.

Claims Summary

To access a serial's CHKM – CLAIMS SUMMARY screen, select the *Claims* option at the serial's SERIAL COPY SET SUMMARY screen or CHKM - CHECKIN FOR (SHIPTO CODE) - (TYPE OF HOLDING CODE). Or, for a specific copy set, select the *Claims* option on the CHKM - CHECKIN FOR (SHIPTO CODE) - (TYPE OF HOLDING CODE) screen.

This screen lists the issues which have the status `CLAIMED`. You may select a claim to examine and edit its CHKM - CLAIM DETAILED DISPLAY screen.

To create a claim, assign the `CLAIMED` status to a copy at the CHKM - CHECKIN FOR (SHIPTO CODE) - (TYPE OF HOLDING CODE) screen. Your system might also be set to have the Serials Claim Generation processing job create claims for late issues automatically.

- | | |
|--------------------------------|--|
| Historic claims | If a copy's status has been changed from <code>CLAIMED</code> to something else, such as <code>RECEIVED</code> or <code>MISSING</code> , then the copy is no longer shown in the list. You can still access a "historic" claim's CHKM - CLAIM DETAILED DISPLAY screen by doing a TX search on the claim number or by (temporarily) changing the copy's status back to <code>CLAIMED</code> on the Detailed checkin screen. Historic claims are also included in the Inactive Claim Report. |
| Specific or multiple copy sets | When you select <i>Claims</i> for a multiple copy set serial, you can specify a particular copy set (by line number) or ask for all (the default). |

```
                CHKM - CLAIMS SUMMARY                                MASTER
LCN       :10008609   Call #: UNC                                ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+           LCCN: sf 80001055

                ENUMERATION/CHRONOLOGY/COPY #                    CAMPUS LIBRARY STATUS
1  Vol.44:No.26(MAY:13:1998)/3                                ADVLIB CENTRAL ACTIVE
2  Vol.44:No.26(MAY:13:1998)/2                                ADVLIB CENTRAL ACTIVE
3  Vol.44:No.26(MAY:13:1998)/                                ADVLIB CENTRAL ACTIVE
4  Vol.44:No.24(APR:15:1998)/3                                ADVLIB CENTRAL ACTIVE
5  Vol.44:No.24(APR:15:1998)/2                                ADVLIB CENTRAL ACTIVE
6  Vol.44:No.24(APR:15:1998)/                                ADVLIB CENTRAL ACTIVE

Options:
Forward  Backward  # line  ? Help  Exit
```

Screen Options

- Forward, Backward* Browses forward or backward to display another screen of claims.
- # line* Advances to the CHKM - CLAIM DETAILED SCREEN for you to examine or edit the claim you specify by its line number on the summary screen.
- ? help* Displays a help message for this screen.
- Exit* Returns to the SERIAL COPY SET SUMMARY screen or a checkin screen.

Display Fields

Sequence Claims are listed in reverse chronological sequence, starting with the most recent issue checkin box on a checkin screen.

The sequence of issues (boxes on a checkin screen), and the sub-sequence of each issue's copies, together determine the claim sequence here. When the Claimed status is assigned to a copy, the claim is inserted at the appropriate place in the summary list.

| | |
|--|---|
| <p><i>ENUMERATION / CHRONOLOGY/ COPY #</i></p> | <p>[text]</p> <p>Claimed copy's issue enumeration (volume numbering) and Claimed copy's issue chronology (cover date). The copy set's copy number (if any), separated by a slash. The copy number is only shown in multiple copy displays.</p> |
| <p>CAMPUS</p> | <p>[6 char.]</p> <p>Online Catalogue description of the copy's Institution Code as defined in the location copy record linked to the copy set.</p> |
| <p>LIBRARY</p> | <p>[text]</p> <p>Copy's Sublocation Code. This code is defined in the location copy record linked to the copy set.</p> |
| <p><i>STATUS</i></p> | <p>[ACTIVE or INACTIVE]</p> <p>Claim status. See the <i>STATUS</i> field of the CHKM - CLAIM DETAILED DISPLAY screen. See Claim Detail on page 3-74</p> |
| <p>ACTIVE</p> | <p>The system can automatically generate a claim letter (or just report the need for one), or change the copy's status from Claimed to Missing, depending on the claim creation and action dates, the number of claim letters already generated, and the copy set's Claim Code.</p> |
| <p>INACTIVE</p> | <p>The system will not take any additional action on the claim — no new claim letters will be generated, nor will the copy be marked Missing.</p> |

Claim Detail

There are four ways to access a claim's CHKM - CLAIM DETAILED DISPLAY screen:

- select a claim at the CHKM - CLAIMS SUMMARY DISPLAY screen
- create a claim by assigning the Claimed status to a copy in the *STATUS* field of the Part Location Summary portion of the Checkin screen.
- <ENTER> at an already Claimed copy in the *STATUS* field of the Part Location Summary portion of the Checkin screen.
- do a TX claim number search from the Checkin Function's initial CHKM - BIBLIOGRAPHIC SEARCH screen.

You can pull up a "historic" claim by doing a TX search on it or by temporarily changing the copy's status from its current value (perhaps Received) back to Claimed at the Detailed checkin screen.

```

                                CHKM - CLAIM DETAILED DISPLAY                                MASTER
LCN      :10008609   Call #: UNC                                ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+         LCCN: sf 80001055

Current location: AL CENTRAL GENERAL c.1

Claim #   : 9100881                Date: 05/14/98                Time: 13:52
Claiming  : Vol.44:No.26(MAY:13:1998)
Last claim: 06/24/98                Times claimed: 1
Order #   :                        Vendor: FAXON
1. Status : ACTIVE Y                2. Message:                    3. Action date: 08/24/98
4. Notes  :

Options:
  Line by line  # line  File  Checkin Status change  ? Help  Exit

```

Screen Options

Line by line

Accesses all 4 fields for you to edit, one after another, starting with the first one on the screen.

-
- # line* Accesses a field for you to edit. Specify the field by its line number.
- File* Saves any changes you made on this screen and returns to one of these screens:
- the CHKM - CLAIMS SUMMARY DISPLAY screen
 - the SERIAL COPY SET SUMMARY DISPLAY screen, if you came from a TX search at the CHKM - BIBLIOGRAPHIC SEARCH screen.
 - the Part Location Summary portion of the Checkin screen
- Reprint If a claim's status is ****Printed****, you can generate a new claim letter for the claim. That is, if the claim is not currently in the Claim Letter Review List (awaiting either printing or deletion), you can add it to the list. It does not matter whether the claim is active or inactive, nor does it matter how many times claim letters have already been generated. Whenever you *File* a ****Printed**** claim, the system prompts:
- Do you wish to REPRINT this claim? (Y/N)
- No matter how you answer, the changes you made on this screen are *not* discarded. The default answer is N.
- Y Answer Y to generate an extra claim letter for an active claim. The *TIMES CLAIMED* counter is incremented, the *LAST CLAIM* date is set to today's date, and the status ****Printed**** is cleared, but the *ACTION DATE* is not automatically updated.
- N Answer N to avoid generating an extra claim letter.
- NOTE: If your library does not have claim autogeneration, "reprinting" is the only way to generate any claim letters after the first one. Be sure to update the *ACTION DATE* field **before** you *File* the claim — when you access this date field, the system uses the appropriate Claim Code period to update it.
- Historic claim A TX search can access a "historic" claim for a copy whose status is no longer Claimed and is now perhaps Missing or Returned. If you *File* such a claim, the system warns:
- Issue is no longer being claimed - No further updates allowed.
- <ENTER> and any changes you made are discarded.

Checkin status change Allows you to change the checkin status of a claimed issue from the CLAIMED DETAILED DISPLAY screen.

```
CHKM - CLAIM DETAILED DISPLAY                                MASTER

LCN      :10008609  Call #: UNC                               ISSN: 0009-5982
Title    :The Chronicle of higher education
Imprint  :[Washington, etc., Chronicle of higher e+        LCCN: sf 80001055

Current location: AL CENTRAL GENERAL c.3

Claim #   : 9100879          Date: 05/14/98          Time: 13:52
Claiming  : Vol.44:No.26(MAY:13:1998)
Last claim: 05/14/98        Times claimed: 1
Order #   :                  Vendor: JW&S
1. Status : ACTIVE Y        2. Message:          3. Action date: 08/12/98
4. Notes  :

-----
| CHECKIN STATUS: 1 - Received
| BARCODE       : 39999212222
| NOTES         : Received replacement copies.
|-----
                                Okay to file changes?
```

When you select the *Checkin status change* option, the system opens a new window that displays the copy's current checkin status, barcode, and notes.

The prompt is positioned at the *CHECKIN STATUS* field.

Enter a status or ?? to see a browse list of status codes. You cannot change the status to next expected issue, next expected index, or next expected supplement.

The system prompts for a barcode and notes. (If you have changed the status to No Action the system skips these fields.)

Once all the information is entered and you <ENTER>, the system prompts: Okay to file changes?

- Y Inactivates the claim and updates the copy with the new checkin status.
- N Ignores changes and returns to the CHKM - CLAIM DETAILED DISPLAY screen.

- ? help* Displays a help message for this screen.
- Exit* Discards any changes you made on this screen and returns to one of three screens as described for the *File* option.
- If you came from the Detailed checkin screen by assigning the `CLAIMED` status to a copy (to create a new claim), then *Exiting* here causes the copy's status to change back to its earlier value. A claim will not be created.

Display Fields

| | |
|-------------------------|---|
| <i>Current location</i> | [text] The site where the issue can be found. This information is derived from the Location Copy linked to the copy set for this copy of the issue. |
| <i>CLAIM #</i> | [10 digit number] Claim control number, automatically assigned to the claim when it is created. When you are creating a new claim, this field remains blank until you <i>File</i> the claim. |
| <i>DATE</i> | [date] Claim's original creation date. When you are creating a new claim, this field remains blank until you <i>File</i> the claim. |
| <i>TIME</i> | [time] Claim's original creation time. When you are creating a new claim, this field remains blank until you <i>File</i> the claim. |
| <i>CLAIMING</i> | [text] Copy's issue enumeration (volume numbering) and chronology (cover date). |
| <i>LAST CLAIM</i> | [date] Date that a claim letter was last generated. When you are creating a new claim or reprinting an existing claim, the date does not change until you <i>File</i> the claim. |
| <i>TIMES CLAIMED</i> | [1 digit] Number of claim letters that have been generated. When you are creating a new claim or reprinting an existing one, the number is not incremented until you <i>File</i> the claim. |
| <i>ORDER #</i> | [10 digit number, 4 digit number] Purchase order control number and order line number (<i>CURRENT PO#</i>) for the copy set. The numbers are separated by a slash. |

VENDOR [8 char. code]
Vendor Code of the vendor you are claiming from.

Edit Fields

1. *STATUS: ACTIVE* [Y or N]
Claim status.

Y The system automatically generates a claim letter (or reports the need for one), or changes the copy's status from *Claimed* to *Missing*, depending on the claim creation and action dates, the number of claim letters already generated, and the copy set's Claim Code.

N The system will not take any action on the claim — no new claim letters will be generated, nor will the copy be marked *Missing*.

2. *MESSAGE* [4 char. code]
Claim Message Code. Determines which message is printed on the claim letter.

3. *ACTION DATE* [date]
Date that the system will next take action on the claim: either generate a claim letter (or report the need for one), or change the copy status to *Missing* (or report the need to do so), depending on the number of claim letters already generated and the copy set's Claim Code.

When you are creating a new claim, this field defaults to today's date plus the number of days specified in the Claim Cycle code record, field *Claim 2 (# days)*.

If you access this field of a **Printed** claim, the system automatically recalculates the date by adding on the number of days defined for the copy set's Claim Code. (This number is defined by the library for claims which have had a particular number of claim letters generated; see the *Serials Management Guide*.)

4. *NOTES* [5+ lines of char.]
Note that prints on the claim letter.

Orders

The three purchase order screens, CHKM - ORDER SUMMARY DISPLAY screen, CHKM - ORDER DETAILED DISPLAY screen, and CHKM - INVOICE DETAILED DISPLAY screen, are briefly described in this section. The two detailed screens are only available for copy sets created in Acquisitions. If the library does not have Acquisitions installed, none of these three screens are available.

Order Summary

To access a serial's CHKM - ORDER SUMMARY DISPLAY screen, select the *Order detail* option at the serial's SERIAL COPY SET SUMMARY screen or the CHKM - CHECKIN FOR (SHIPTO CODE) - (TYPE OF HOLDING CODE) screen.

Specific or
multiple copy
sets

When you select *Order detail* for a multiple copy set serial, you can either specify a particular copy set (by line number) or ask for all copy sets (<ENTER> without entering a line number).

The CHKM - ORDER SUMMARY DISPLAY screen appears. This screen shows brief purchase order information for each copy set, if there is order information available.

On this screen you may select a copy set to access the CHKM - ORDER DETAILED DISPLAY screen for its order, and from that screen you may select an invoice to access the CHKM - INVOICE DETAILED DISPLAY screen.

| CHKM - ORDER SUMMARY DISPLAY | | | | | MASTER |
|------------------------------|-------|---|---------|--------|-------------------|
| LCN | : | 10008609 | Call #: | UNC | ISSN: 0009-5982 |
| Title | : | The Chronicle of higher education | | | |
| Imprint | : | [Washington, etc., Chronicle of higher e+ | | | LCCN: sf 80001055 |
| CAMPUS | COPY# | PO# | /ITEM | VENDOR | ORDER DATE |
| 1. ADVLIB | 1 | 971000022/0001 | | FAXON | 05/14/98 |
| 2. ADVLIB | 2 | 971000022/0001 | | FAXON | 05/14/98 |
| 3. ADVLIB | 3 | 971000022/0001 | | FAXON | 05/14/98 |
| 4. ADVLIB | 4 | 971000022/0001 | | FAXON | 05/14/98 |
| ** Last screen ** | | | | | |
| Options: | | | | | |
| # line | | ? Help | | Exit | |

Screen Options

line

Advances to the CHKM - ORDER DETAILED DISPLAY screen for the copy set you specify by line number. (Only the copy sets with a date in the *ORDER DATE* column have orders for you to see — these are the orders created in Acquisitions.)

- ? *help* Displays a help message for this screen.
- Exit* Returns to the SERIAL - COPY SET SUMMARY screen or a checkin screen.

Display Fields

- CAMPUS [6 char.]
Online Catalogue description of the copy's Institution Code as defined in the location copy record linked to the copy set.
- COPY # [text]
Copy number.
- PO# /ITEM [10 digit number;
4 digit number]
Purchase order control number and order line number (separated by a slash) for the copy set — see the *CURRENT PO#* field of the SERIAL COPY SET DETAIL screen.
- VENDOR [8 char.]
Vendor Code of the copy set's vendor — see the *VENDOR CODE* field of the SERIAL COPY SET DETAIL screen.
- ORDER DATE [date]
Purchase order creation date (i.e. date the order was “cut”). A date is shown only if detailed information is available for the order — that is, if the copy set was ordered in Acquisitions or linked to an order in Acquisitions.

Order Detail

To access the CHKM - ORDER DETAILED DISPLAY screen select a copy set at the CHKM - ORDER SUMMARY DISPLAY screen.

The screen describes a purchase order line item, which might cover multiple copy sets of the serial, and lists the invoices which have been created for the order (the latest one first).

```

                                CHKM - ORDER DETAILED DISPLAY                                MASTER
LCN       : 10008609   Call #: UNC                                ISSN: 0009-5982
Title    : The Chronicle of higher education
Imprint  : [Washington, etc., Chronicle of higher e+           LCCN: sf 80001055
PO#/LINE# : 971000022/0001   VENDOR      : FAXON              ORDER DATE  : 05/14/98
REQUEST # : 970000120        ORDER TYPE: FIRMORD-S           REQUEST DATE: 05/14/98
LIBRARY   : AL              CONDITION   : OPEN                EST DELIVERY: 06/07/98
SUBSCRIPTION: 01/01/98 TO 12/31/98                          ORDER COPIES: 4
STATUS    : On Order,Serial

      DATE      INVOICE NUMBER      PAGE/LN TYPE STATUS      AMOUNT VENDOR
1 09/04/98 FA21222                01/01 PAR   Paid        576.34 FAXON
FROM: 01/01/98 TO: 12/31/98

** Last screen **
Options:
# line  Order update  ? Help  Exit

```

If an invoice detail *NOTE*, or *FROM* and *TO* invoice dates, are defined for a line item, they will be shown on this screen, on the second line of the item description which is otherwise left blank.

Screen Options

line

Advances to the CHKM - INVOICE DETAILED DISPLAY screen for the invoice you specify by line number.

| | |
|--------------------|--|
| Order update | Displays the ORD - ORDERING DATA screen from which you can view or update the order. |
| ? help | Displays a help message for this screen. |
| Exit | Returns to the SERIAL COPY SET SUMMARY screen or a checkin screen. |
| Parent's Invoicing | (This option appears only if the order record has a parent in Acquisitions.) |

Display Fields

The fields and content shown in the CHKM - ORDER DETAILED DISPLAY screen are similar to those on the Acquisitions' REC - INVOICE SUMMARY DISPLAY screen for the order. See *Receiving, Returning, and Claiming* in the *Acquisitions User's Guide*.

Field labels in Serials vary slightly from those in Acquisitions:

- *EST DELIVERY* instead of Acquisitions' *EST DELVRY*
- *LCCN* instead of Acquisitions' *LC CARD #*
- *ISSN* instead of Acquisitions' *ISBN/ISSN*.

NOTE: The *LIBRARY* field on this screen, like the one in Acquisitions, contains the order's Library Code — a budget classification that need not correspond to any of the library's Institution or Sublocation Codes.

This screen also has some additional fields: the usual serial *LCN* and *IMPRINT* fields, plus the *SUBSCRIPTION* and *ORDER COPIES* fields.

SUBSCRIPTION

[date, "TO", date]

The beginning and end publication dates of the current serial subscription handled by this order.

These dates come from the current *SUB START* and *SUB END* fields of the Acquisitions ORD - NOTES SCREEN. These dates change if Acquisitions staff reorder the serial with new dates.

ORDER COPIES

[3 digits]

Number of copy sets of the serial on this order. This number comes from the *TOTAL CPY* field of the Acquisitions ORD - ORDERING DATA screen.

Invoice Detail

To access the CHKM - INVOICE DETAILED DISPLAY screen, select an invoice at the CHKM - ORDER DETAILED DISPLAY screen.

The screen describes the invoice for a purchase order line item, which might cover multiple copy sets of the serial. The following sample corresponds to the first invoice on the CHKM - ORDER DETAILED DISPLAY screen.

```

                                CHKM - INVOICE DETAILED DISPLAY                                MASTER
LCN      : 10008609   Call #: UNC                                ISSN: 0009-5982
Title    : The Chronicle of higher education
Imprint  : [Washington, etc., Chronicle of higher e+           LCCN: sf 80001055
PO#/LINE# : 971000022/0001  VENDOR   : FAXON                 ORDER DATE  : 05/14/98
REQUEST # : 970000120      ORDER TYPE: FIRMORD-S           REQUEST DATE: 05/14/98
LIBRARY   : AL              CONDITION  : OPEN                EST DELIVERY: 06/07/98
SUBSCRIPTION: 01/01/98 TO 12/31/98                          ORDER COPIES: 4
STATUS    : On Order,Serial
INVOICE # : FA212222      LIBRARY: AL                    INVOICE CURR: USD
VENDOR    : FAXON         STATUS  : Paid,Verified    PAYMENT CURR: USD
PAGE/LINE : 01/01        FROM    : 01/01/98 TO: 12/31/98
LINE TYPE : PAR   QTY :   0      REPORT CD:
PRICE     :           576.34    NOTE      :
DISCOUNT :           0.00 Y
REGULAR CHG:           0.00 Y   STATUS   : Paid
SPECIAL CHG:           0.00     Paid    : 09/04/98
TAX       :           0.00 Y   TOTAL    : 576.34
OTHER CHG :           0.00 Y
Options:
  Note display  ? Help  Exit

```

Screen Options

- Note display* Displays the full text of the invoice note. (Use ESC : E to exit from the window.)
- ? help* Displays a help message for this screen.
- Exit* Returns to the CHKM - ORDER DETAILED DISPLAY screen.

Display Fields

The fields and content shown in the CHKM - ORDER DETAILED DISPLAY screen are similar to those on the Acquisitions' REC - INVOICE SUMMARY DISPLAY screen for the order. See *Receiving, Returning, and Claiming* in the *Acquisitions User's Guide*.

The top half of this screen has some fields labelled a bit differently than the ones in Acquisitions, and some additional fields. See the description of the CHKM - ORDER DETAILED DISPLAY screen display fields. See [Order Detail](#) on page 3-83

4

Routing

Whenever a copy of an issue of a serial is Received at the Checkin Screens, the system can print a routing list of patrons for it. You can create standard routing lists and then, in the Holdings Function, assign them to copy sets of serials.

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

- accessing the function
- the SERIALS CONTROL ROUTING MENU
- Routing ID (routing lists)
 - searching for a standard routing list: RTEM - ROUTING ID SEARCH
 - the RTEM - STANDARD ROUTING ID screen
 - adding and deleting a routing list, and updating its list of patrons
 - list of serials using a routing list: RTEM - ROUTING ID TITLES DISPLAY screen
- Routing Recipients (patrons)
 - searching for a patron: RTEM - RECIPIENT SEARCH
 - list of serials received by a patron: RTEM - RECIPIENT TITLES DISPLAY screen.

Routing IDs are assigned to copy sets of titles in the Holdings Function. There you can remove a copy set from a standard routing list (by changing the Routing ID assignment) or create a non-standard “private” routing list for a copy set.

For the RTEM - ROUTING SLIP FORMAT definition screen, refer to the *Serials Management Guide*.

Accessing the Routing Menu

Access the SERIALS CONTROL ROUTING MENU by selecting it from the SERIALS CONTROL MAIN MENU, or by entering the screen identifier (RTEM) at any Serials menu.

The main menu offers access to all Serials functions but, depending on the permissions assigned to your ID, some functions might not be accessible from your menu.

```
DD MMM YYYY          Geac ADVANCE Library System (#.##)          P P P P P I I I I I
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 :

Routing Menu

The SERIALS CONTROL ROUTING MENU offers access to all 3 routing subfunctions but, depending on the permissions assigned to your logon ID, your menu might not offer you access to all of them.

```

DD MMM YYYY          Geac - Library Division - ADVANCE (X.XX)          PPP IIIIII
  HH:DD              Your Library Name

SERIALS CONTROL ROUTING MENU (RTEM)

1. RADD  Add/Update Standard Routing IDs
2. RREC  Routing Recipient Display
3. RFMT  Routing List Format

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

Routing Menu Items

- <ENTER> Returns to the SERIALS CONTROL MAIN MENU or other screen at which you entered the RTEM screen identifier.
1. RADD Enter 1 or RADD to access the Routing ID Subfunction. There you can select a standard routing list of patrons and then:
- display, add, or edit the routing list
 - display a complete list of serials which use the routing list
 - delete the standard routing list.
2. RREC Enter 2 or RREC to access the Routing Recipient Subfunction. There you can select a patron and then:

- display the complete list of serials routed to the patron
- delete the patron from all standard and private routing lists.

3 . RFMT

Enter 3 or RFMT to access the Routing Slip Format Subfunction, to display or edit the slip's defined printing format. For a description of this subfunction, refer to the *Serials Management Guide*.

Routing ID

Access the Routing ID Subfunction either by selecting 1 at the SERIALS CONTROL ROUTING MENU or by entering the screen identifier (RADD) at any Serials menu. The two types of Routing IDs are described.

- | | |
|----------------------|--|
| Standard Routing IDs | A standard Routing ID is a general routing list created and maintained here in the Routing Function, and usually assigned to several serial copy sets in the Holdings Function. |
| Private Routing IDs | A private Routing ID is a special routing list created and maintained for one particular serial copy set in the Holdings Function. The format of a private Routing ID's code is "P" followed by a system-assigned number, e.g. P91000241. Private Routing ID codes are not indexed and thus are not shown in an ID search. |

Searching for a Routing ID

The first screen in the Routing ID Subfunction is the search screen, RTEM - ROUTING ID SEARCH.

```

                                RTEM - ROUTING ID SEARCH                                ID.CODE

ENTER type of ROUTING ID retrieval:

ID  Search standard Routing IDs          NEW  Create a new Routing ID
LST Retrieve last Routing ID accessed

Enter option=

Enter the search code and string (eg ID=RTE1), or <ENTER> to exit
```

Search Options

There are two ways to start a search:

- enter the search code, an equals sign, and your search string, then <ENTER>. For example:

```
Enter option= ID=ENVIR
```

- enter the search code and <ENTER>, at the new prompt, enter your search string and <ENTER> again. For example:

```
Enter option= ID
```

```
Enter search string= ENVIR
```

<ENTER>

Returns to the SERIALS CONTROL ROUTING MENU or other screen at which you entered the RADD screen identifier.

- ID* Searches on the Routing ID. The screens and options you encounter are like those in an Online Catalogue search — refer to the *Online Catalogue User's Guide* for explanations.
- NEW* Advances to a blank RTEM - STANDARD ROUTING ID screen for you to add a new Routing ID routing list. Do not enter a search string.
- LST* Retrieves the Routing ID you last retrieved in the Routing ID Subfunction. Do not enter a search string.

Routing List

Access the RTEM - STANDARD ROUTING ID screen from the RTEM - ROUTING ID SEARCH screen.

This screen allows you to delete or edit the standard Routing ID, or see the list of serials which use the list.

NOTE: To remove a title (a copy set) from the routing list, change the Routing ID assignment at the copy set's SERIAL COPY SET DETAIL screen.

```

RTEM - STANDARD ROUTING ID                                     ID.CODE

1. ROUTING ID : ENVIR
2. DESCRIPTION: Environmental Studies

3. PATRON BARCODE/ROUTING ID NAME                            LOCATION
20000003511624          ZANER, ANDREA                      211 Chem
20000001489347          FIEF, STEPHEN                          772-A Chem
20000029848484          ALVERXIE, ERIC B.                       Envir Ref
20000000339476          GHOU, DENISE                             L#397 Cent

Options:
Forward  Backward  File  Delete  # line  Line by line  Title
Prior screen  ? help  Exit

```

Delete deletes the Routing ID and returns you to the RTEM - ROUTING ID SEARCH screen. The system asks if you are sure:

Do you wish to delete this list from routing file? (Y/N):

(The default is N.) If you answer *Y*, the system deletes the Routing ID and, for every copy set that used this Routing ID, the system puts a blank value in the *ROUTING ID* field of the SERIAL COPY SET DETAIL screen and puts *N* in the *RTE* column of the SERIAL COPY SET SUMMARY screen.

Title takes you to the RTEM - ROUTING ID TITLES DISPLAY screen to see a list of serials which use this Routing ID.

Exit and *Prior screen* discard any changes you made on this screen. If you were adding a new Routing ID (having used the NEW search type), the new ID is deleted. *Exit* returns to the initial RTEM - ROUTING ID SEARCH screen but *Prior screen* returns to the intermediate index browse screen for you to do another search of the same type.

The *ROUTING ID* field can be accessed only when you are adding a new Routing ID. You cannot change a list's ID after it has been *Filed*.

New Routing List

When you add a new Routing ID (having used the NEW search type), the system shows a screen with all of the fields left blank and the cursor left in the first field for you to start entering data. The system does not display the options line until you have completed or skipped over all the fields. (You can go directly to the option line by entering just a blank and <ENTER> at one of the fields.)

The *Title* option is not available when you are adding a new Routing ID.

Patron List

When you access the *PATRON BARCODE* field, the system redisplay the screen with patron line numbering and a new set of options.

```

                                RTEM - STANDARD ROUTING ID                                ID.CODE

ROUTING ID : ENVIR
DESCRIPTION: Environmental Studies

PATRON BARCODE/ROUTING ID NAME                                LOCATION
1  20000003511624                                ZANER, ANDREA                                211 Chem
2  20000001489347                                FIEF, STEPHEN                                772-A Chem
3  20000029848484                                ALVERXIE, ERIC B.                            Envir Ref
4  20000000339476                                GHOU, DENISE                                  L#397 Cent
5
6
7
8
9
10
11
12

Options:
Insert at specified line  Delete line  Move  Accept  Forward
Backward  # line  Line by line  ? help  Exit
```

You can add, delete, and rearrange patrons on the list; you can also add all the patrons from one or more other lists to this list (and the system removes duplicate names).

To see the list of available patrons, enter ?? at the *PATRON BARCODE* field — these are the patrons who have their *Rte. Recipient* field set to Y at Circulation’s *PATRON REGISTRATION* screen. It is the value in their *Rte. Location* field defined there that is shown in the *LOCATION* column of the routing list screen here.

To see the list of available standard routing lists, enter S? at the *PATRON BARCODE* field.

The *Accept* and *Exit* options return you to the initial RTEM - STANDARD ROUTING ID screen. *Accept* saves the current patron list for now — whether it is saved in the end depends on whether you *File* or *Exit* from the initial screen.

Title List for a Routing ID

To access the RTEM - ROUTING ID TITLES DISPLAY screen, select the *Title* option at the Routing ID's RTEM - STANDARD ROUTING ID screen.

The screen lists the serial copy sets which use this Routing ID. The ID column is blank because all the copy sets listed have the same ID.

```

                                RTEM - ROUTING ID TITLES DISPLAY                                ID.CODE

ROUTING ID      : ENVIR
DESCRIPTION     : Environmental Studies
# OF RECIPIENTS : 4

                                TITLE                                CAMPUS COPY#  ID
-----
1. Water Purification Quarterly      CENTRL 2
2. Journal of Mountain Climatology  CENTRL 1
3. Urban Microclimates              NORTH  1

** Last screen **
Options:
Prior screen  ? help  Exit
```

Routing Recipients

Access the Routing Recipient Subfunction either by selecting 2 at the SERIALS CONTROL ROUTING MENU or by entering the screen identifier (RREC) at any Serials menu.

A routing recipient is a patron who may be included in routing lists; her or his *Rte. Recipient* field is set to Y at Circulation's PATRON REGISTRATION screen.

Searching for A Recipient

The first screen in the Routing Recipient Subfunction is the search screen, RTEM - RECIPIENT SEARCH.

```

                                RTEM - RECIPIENT SEARCH                                ID.CODE

ENTER type of RECIPIENT retrieval:

B   Search Patron Barcodes           N   Search Patron Names

Enter option=

Enter the search code and string (eg N=SMITH, JOE), or <ENTER> to exit

```

Search Options

There are two ways to start a search:

- enter the search code, an equals sign, your search string, and <ENTER>.
- For example:

```
Enter option= M=FIEF STEPHEN
```

- enter the search code and <ENTER>, then at the new prompt, enter your search string and <ENTER>. For example:

```
Enter option= N
```

```
Enter search string= FIEF STEPHEN
```

The screens and options you encounter are like those in an Online Catalogue search; refer to the Online Catalogue User's Guide for explanations. The index screens have 3 columns of information: *NAME*, *PATRON BARCODE*, and *ROUTING GROUP IDS*. This last column lists the patron's first few standard and private Routing ID codes, separated by “}” symbols. For example:

```
CANPOL}CHEM2}ENVIR}P910+
```

- <ENTER>** Returns to the SERIALS CONTROL ROUTING MENU or other screen at which you entered the RREC screen identifier.
- B** Searches on the Patron Barcode Number.
- N** Searches on the Patron Name.

Title List for a Recipient

Access the RTEM - RECIPIENT TITLES DISPLAY from the RTEM - RECIPIENT SEARCH screen.

This screen lists all the serial copy sets which are routed to the patron via standard or private Routing IDS, and allows you to delete the patron from all Routing ID lists.

```

                                RTEM -RECIPIENT TITLES DISPLAY                                ID.CODE

BARCODE           : 20000001489347
NAME              : fief, steven
LOCATION           : 772-A Chem

                                TITLE                                CAMPUS COPY#  ID
-----
1. Urban Affairs          CENTRL  3    CANPOL
2. Water Analysis        CENTRL  1    CHEM2
3. Water Purification Quarterly CENTRL  2    ENVIR
4. Journal of Mountain Climatology CENTRL  1    ENVIR
5. Urban Microclimates   NORTH  1    ENVIR
6. Arts Monthly          CENTRL  2    P91000773

** Last screen **
Options
Delete  Prior screen  ? help  Exit

```

Use the Delete option to remove a patron from all standard and private Routing ID lists and return to the initial RTEM - RECIPIENT SEARCH screen. The systems asks if you are sure:

Do you wish to delete this person from ALL routing lists? (Y/N):

(The default is N.)

Exit returns to the initial RTEM - RECIPIENT SEARCH screen; *Prior screen* returns to the intermediate index browse screen, allowing you to do another search of the same type.

5

Vendor Maintenance

Procedure

The library keeps track of the organizations which supply it with materials. These vendors may include: booksellers, serials agents, publishers, jobbers, exchange partners, donors, and government agencies.

To view, add, or update a vendor:

- Access the VENDOR SEARCH & RETRIEVAL SCREEN by selecting it at the SERIALS MAIN MENU or by entering VENM at any Serials menu.
- Access a new or existing vendor.
- View or enter header information.
- View or enter addresses and notes, or view deposit account and annual statistics, then return to the header screen.
- When finished, select *File*, *Exit*, or *Prior screen* to leave the vendor.

```
VEN - VENDOR SEARCH & RETRIEVAL                                MASTER

ENTER type of vendor retrieval:

VC  Search by vendor code          VN  Search by vendor name
LST Retrieve last vendor          A   Search by accounting id
NEW Create a new vendor

Enter option= _____

Enter the search code and string (e.g VN=vendor name), or <ENTER> to exit
```

Accessing a Vendor

Procedure

- To add a **new** vendor, enter `NEW`.
- To access an **existing** vendor, enter a search type and search text.
 - Browse the index screens, if necessary.
 - Select an item or return to this screen.

Vendor Header

Procedure

When you access a vendor, the system displays the VENDOR HEADER SCREEN. On this screen, you may:

- View or enter the main vendor information as needed. You may also, if necessary:
 - Use the *Address* option to view or enter the main mailing address and/or alternate addresses for payments, claims, and returns, then *Accept* or *Exit* to return to the VENDOR HEADER SCREEN.
 - Use the *Notes* option to view or enter vendor notes and other information such as a default order method, then *Accept* or *Exit* to return to the VENDOR HEADER SCREEN.
 - Use the *Deposit* or *Statistics* options to view deposit account or annual statistics information, then *Exit* to return to the VENDOR HEADER SCREEN.
- When finished, select *File*, *Exit*, or *Prior* screen.

```

                                VEN - VENDOR HEADER SCREEN                                MASTER
1. NAME      : Faxon Subscription Services                                8. TYPE      : AGEN
2. CODE      : FAXON                                                    9. USAGE     : SERIAL
3. ACCT ID   : 132934                                                    10. CURRENCY  : US
4. GROUP     :                               SUB-ID :                    11. CLAIM CODE: DFLT
5. LIBRARY   : MA                                                        12. PAY TYPE  : PAY
6. LIB ACCT  : 9321302                                                    13. DISCOUNT %:
7. STATUS    : ACTIVE
MAIL ADDRESS
LINE1       : 15 Southwest Park                                POSTAL/ZIP: 02090
LINE2       :                                               SAN      :
LINE3       :                                               FAX      : 617329987
CITY        : Westwood                                           TELEX    : 49600398
PROV/STATE  : MA                                               ALT NAME:
COUNTRY     : USA      - United States of America
              NAME      TITLE      PHONE
CONTACT1    : Jane Knotts    ext. 3423    (617)723-3422
CONTACT2    :
CONTACT3    :
Options:    Enter specified line number
File Line by line # line Address Deposit Statistics Notes
Identifiers Prior screen ? help Exi

```

Fields

- 1. *NAME* [36 characters maximum]
Vendor's name. The system indexes this name so that it is accessible in *VN* searches and in *N=* searches in some *VENDOR* fields (in the Holdings Function, and in several functions in Acquisitions).
This text is used as the vendor's name on forms unless the *ALT NAME* field on the *VENDOR ADDRESS SCREEN* is answered *Y* to have the *LINE1* address text used instead.
Alternate, indexed vendor names can be defined in the *RELATED NAMES* field on the *VENDOR NOTES* screen.

- 2. *CODE* [Vendor Code; 1-8 characters]
Code for the vendor, used in the *VENDOR* field of orders, invoices, vouchers, and so on throughout Serials. The system indexes this code so that it is searchable in *VC* searches.

- 3. *ACCT ID* [23 characters maximum]
Accounting ID assigned to the vendor by the library or its financial services department.

- 4. *GROUP* [Y (yes) or N (no)]
Indicates whether or not this vendor's Vendor Code can be assigned in the *SUB-ID* field of other vendors. This can help group vendors for reporting purposes. For example, you could create the following set of vendors:

Vendor Groups

| NAME | CODE | GROUP | SUB-ID |
|-----------------------------|-------------|--------------|---------------|
| Alphabet Co. | ABC | Y | |
| Alphabet Co. Serials Div. | ABCS | N | ABC |
| Alphabet Co. Approvals Div. | ABCA | N | ABC |
| British Alphabet Co. | ABCB | N | ABC |

- ... *SUB-ID* [Vendor Code; 1-8 characters]
If this vendor belongs to a group, specify the Vendor Code here.
5. *LIBRARY* [Library Code; 1-6 characters]
Library division (basic accounting/reporting unit) which may order items from the vendor. Whether or not the order library must match the vendor library is determined by system setup.
If match not required:
Code entered here is for information only.
If match is required:
If you enter a code here, the system will prevent all other library divisions from ordering items from this vendor: that is, the system will cross check the order *LIBRARY* and *VENDOR* fields.
NOTE: This is a mandatory field, and once the vendor record is *Filed*, the value cannot be changed.
6. *LIB ACCT* [18 characters maximum]
Accounting ID assigned to the library by the vendor. This information is currently used by the BISAC Ordering Interface.
7. *STATUS* [Vendor Status Code; 1-8 characters]
Indicates whether or not (and why not) the vendor can be used. This is for information only: the system warns but does not prevent staff from assigning inactive vendors (defunct or blacklisted) to orders, invoices, or vouchers.
8. *TYPE* [Vendor Type Code; 1-4 characters]
Identifies the type of vendor, for information only. The basic types are: supplier, exchange partner, donor, publisher.
(For reporting or information-only purposes, the library may have more than one code set up for some basic types.)

9. *USAGE* [Vendor Usage Code; 1-6 characters]
Kinds of materials generally ordered from the vendor, for example: books, serial back issues, and so on. For information only.
10. *CURRENCY* [Currency Code; 1-8 characters]
Currency generally used by the library with the vendor.
Supplied as the vendor default in:
- the *CURRENCY* field of orders
 - the *INVOICE CURR* and *PAYMENT CURR* fields of invoices
 - the *PAYMENT CURR* field of vouchers.
11. *CLAIM CODE* [Claim Code; 1-6 characters]
Cycle of action dates for claims and cancellation letters generally used by the library with the vendor.
Supplied as the vendor default in the *CLM CODE* field of orders.
12. *PAY TYPE* [Payment Type Code; 1-8 characters]
How and when the library generally pays the vendor. Examples: debit a deposit account when the item is ordered, prepayment is required, do not spend (free item), and so on.
Supplied as the vendor default in the *PAY TYPE* field of orders.
13. *DISCOUNT %* [4-6 digits (999.999)]
Discount percentage generally offered by the vendor on orders.
Supplied as the vendor default in the *DISCOUNT %* field of orders.

Vendor Addresses

Procedure

To view or enter address information, select the *Address* option on the Vendor Header screen to access the VENDOR ADDRESS SCREEN.

In addition to the default *Mailing* address, you can define additional *Payment*, *Claiming*, and *Return* addresses for the vendor. Use the corresponding options to go from one address to another. The screens look quite similar but they are distinguished by the *ADDRESS* heading above the *LINE1* field.

When finished with all the addresses, *Accept* or *Exit* to return to the Vendor Header screen.

```

                                VEN - VENDOR ADDRESS SCREEN                                MASTER
NAME       : Faxon Subscription Services                                TYPE      : AGEN
CODE       : FAXON                                                    USAGE     : SERIAL
ACCT ID    : 132934                                                    CURRENCY  : US
GROUP     :                   SUB-ID :                               CLAIM CODE: DFLT
LIBRARY   : MA                                                        PAY TYPE  : PAY
LIB ACCT  : 9321302                                                    DISCOUNT %:
STATUS    : ACTIVE

MAIL ADDRESS
1. LINE1   : 15 Southwest Park                                         7. POSTAL/ZIP: 02090
2. LINE2   :                                                           8. SAN    :
3. LINE3   :                                                           9. FAX    : 617329987
4. CITY    : Westwood                                                10. TELEX: 49600398
5. PROV/STATE: MA                                                    11. ALT NAME:
6. COUNTRY : USA - United States of America
      NAME      TITLE      PHONE
12. CONTACT1 : Jane Knotts      ext. 3423      (617)723-3422
13. CONTACT2 :
14. CONTACT3 :
Options:   Enter specified line number
Line by line # line  Accept  Mailing  Payment  Claiming  Return
? Help    Exit

```

1. *LINE1*
2. *LINE2*
3. *LINE3*

[each field is 33+ characters maximum]

First, second, and third line of the vendor's address.

LINE1 can also serve as the vendor's name on forms (see the field, *11. ALT NAME* on page 5-8).

4. *CITY* [33+ characters maximum]
City for this vendor's address.
5. *PROV/STATE* [33+ characters maximum]
Province or state for this vendor's address.
6. *COUNTRY* [Country Code; 1-8 characters]
Country for this vendor's address.
7. *POSTAL/ZIP* [1-10 characters maximum]
Postal or Zip code for this vendor's address.
8. *SAN* [12 characters maximum]
Standard Address Number for this vendor's address.
9. *FAX* [10+ digits maximum]
Vendor's fax number.
10. *TELEX* [10+ digits maximum]
Vendor's telex number.
11. *ALT NAME* [Y (yes) or N (no)]
Specifies whether or not you want the system to use the text from *LINE 1* (rather than from the header screen's *NAME* field) as the vendor's name on forms.
12. *CONTACT1*
13. *CONTACT2*
14. *CONTACT3*
Specifies up to three contact people. For each person, specify a name, title or phone extension (e.g. ext . 3250), and phone number in the columns listed below. This information is not used in the standard forms.
- ... *NAME* [23 characters maximum]
- ... *TITLE* [20 characters maximum]
- ... *PHONE* [15 digits maximum]

Deposit Accounts

Procedure

To view information about deposit accounts maintained with the vendor, select the *Deposit* option on the Vendor Header screen to access the DISPLAY DEPOSIT ACCOUNTS screen.

```
VEN - DISPLAY DEPOSIT ACCOUNTS                MASTER
NAME      : Faxon Subscription Services        CODE   : FAXON
ACCT ID   : 132934                            GROUP  :          SUB-ID  :
STATUS    : ACTIVE    LIBRARY : MA          TYPE  : AGEN  USAGE  : SERIAL

DEPOSIT ACCOUNT      CURRENT      REPLENISHMENT      MINIMUM
BALANCE              BALANCE      LEVEL              BALANCE
1000-DEPOS-FAXON    2,835.75      5,000.00          2,000.00

Options:      Move forward
Forward Backward  ? Help  Exit
```

Vendor Statistics Inquiry

To view statistical vendor information, select the *Statistics* option on the Vendor Header screen to access the VENDOR INQUIRY SCREEN.

```
VEN  VENDOR INQUIRY SCREEN                                MASTER

NAME   : Faxon Subscription Services                      CODE   : FAXON
ACCT ID: 132934                                           GROUP  :
STATUS : ACTIVE     LIBRARY : MA                         TYPE   : AGEN   SUB-ID  :
                                                    USAGE  : SERIAL

LAST ORDER DATE :

                CURRENT YEAR                PRIOR YEAR
ORDERED                576                    530
OPEN                   560                    524
CLOSED                  0                      0
CANCELLED               16                      6
CLAIMED                 0                      0

COMMIT                6,456.12
SPENT                 45,234.00
ENTRY : 03/10/91     BY : MASTER
EDIT  : 03/10/93     BY : MASTER

Options:  Display Prior Year Information
          Prior year  ? help  Exit
```

Use the *Prior year* option to view another column of information, for the year prior to the one shown in the current right-hand column.

Vendor Notes and Other Information

Procedure To view or enter notes and miscellaneous information about the vendor, select the *Notes* option on the Vendor Header screen to access the VENDOR NOTES screen.

When finished, select *Accept* or *Exit*.

```

                                VEN - VENDOR NOTES                                MASTER
NAME      : Faxon Subscription Services                                CODE   : FAXON
ACCT ID: 132934                                GROUP  :                                SUB-ID  :
STATUS   : ACTIVE      LIBRARY : MA      TYPE   : AGEN      USAGE  : SERIAL

1. FORMAT CODES   : SE                                6. TAX-ID       : 234212
2. BUSINESS TYPE :                                7. TAX FORM    : N
3. ORDER METHOD   : REGPO                                8. SHIPTO      :
4. ORDER AUTODIAL :                                9. RENWL NOTICE : Y
5. MIN ORD AMT   : 0.00                                10. ISBN PREFIX :
11. RELATED NAMES : Faxon Company/*/Faxon Limited

12. GENERAL NOTE  : Please order subscriptions using this vendor
13. TERMS NOTE    : Discounts apply if paid within 45 days of invoicing

Options:
Accept  Line by line  # line  ? help  Exit

```

Fields

1. *FORMAT CODES* [zero, one or more MARC Format Codes; 1-2 characters each]

Specifies which MARC formats (e.g. BK monographs, SE serials, MA maps) of material may be ordered from the vendor.

If you enter one or more codes here, the system will prevent any other format from being ordered from this vendor: that is, the system will check the order *MATERIAL CODE* and *FORMAT* fields against the contents of this *VENDOR* field.

If you do *not* enter any codes here, items of any format may be ordered from this vendor.

2. *BUSINESS TYPE* [20 characters maximum]
Vendor's business type. For information only.
3. *ORDER METHOD* [Order Method Code; 1-6 characters]
Controls the printing, transmission, and default format of orders to this vendor.

The default PO Format Code set up for this Order Method Code controls, in turn, single-line and multi-line purchase order formats. (If the Order Method Code is not set up with a default PO Format Code, a system default is used.)
4. *ORDER AUTODIAL* [15 digits maximum]
Autodial number for the vendor, for electronic ordering. Currently for information only.
5. *MIN ORD AMT* [12 digits maximum]
Minimum order amount allowed by this vendor, in the base currency. For information only.
6. *TAX-ID* [12 digits maximum]
Vendor's tax identification number.
7. *TAX FORM* [Y (yes) or N (no)]
Specifies whether or not the vendor requires a tax form. For information only.
8. *SHIPTO* [Ship To Code; 1-6 characters]
Specifies the drop-shipment address for receipt of copies, if this vendor is an **exchange partner**.

In exchange agreements, the library will receive and send materials with one or more partners.
- To facilitate **receiving** items, the library can define each exchange partner as a vendor, and then: create an open order with them and use the *Title change/split add* option in Receiving to enter items when they arrive.

- To facilitate **sending** items, the library can define itself as a vendor (or as multiple vendors, one per exchange partner, if separate statistics are preferred), and then: create a multi-item request, check the exchange partner vendor record for the proper Ship To Code to use, use the *Title change/split add* option in Receiving to enter the items being sent, and authorize the order.

(For more information, refer to the *Acquisitions User's Guide, Handling Multi-item Orders*).

9. *RENWL NOTICE*

[Y (yes) or N (no)]

Specifies whether or not you want renewal notices printed and sent to the vendor when orders are renewed.

10. *ISBN PREFIX*

[12 characters maximum]

International Standard Book/Serial/Record Number prefix for the vendor if it is a publisher.

11. *RELATED NAMES*

[zero, one or more names; each 57+ characters maximum]

Additional names for the vendor. The system indexes these names so that they are searchable in \sqrt{N} searches on search screens and in $N=$ searches in some *VENDOR* fields.

12. *GENERAL NOTE*

[57+ characters maximum; window available]

User-defined general note about the vendor.

13. *TERMS NOTE*

[57+ characters maximum; window available]

User-defined note about the vendor's terms for ordering, returning, claiming, invoicing, and payment.

Vendor EDI Identification

Procedure

To display or enter the identification numbers necessary for successful implementation of electronic invoicing and other forms of EDI with the vendor, select the *Identifiers* options from the VENDOR HEADER SCREEN. This screen needs to be completed before initiating Electronic Data Interchange (EDI) with the vendor.

When finished, select *Accept* or *Exit* to continue.

```

                                VEN - EDI IDENTIFICATION                                MASTER
NAME   : Penguin Books Canada Limited                                CODE   : PENGUIN
ACCT ID: 10002343                                GROUP  :                                SUB-ID :
STATUS : ACTIVE      LIBRARY : UL              TYPE   : PUBL              USAGE  : BOOKS

1. DUNS NUMBER: 1234322
2. FEDERAL ID : 121111199

3.   SHIPTO  IDENTIFIER                                TYPE
   1. BRNCH1 17191                                    0
   2. BRNCH2 17191                                    0
   3. BRNCH3 33333                                    0

4.   BILTO   IDENTIFIER                                TYPE
   1. BRNCH3 33333                                    0
   2. MAIN   17191                                    0
   3.

Options:
Accept  Update window # line  Line by line  Forward  Backward
? help  Exit

```


Fields

1. *DUNS NUMBER* [25 characters maximum]
The vendor's DUNS number as supplied by the vendor.

2. *FEDERAL ID:* [25 characters maximum]
The vendor's federal identification number as supplied by the vendor.

3. *SHIP TO/ 4. BILLTO* [25 characters for IDENTIFIER, 1 character for TYPE]
Tables
For each SHIPTO and BILLTO Code in the Acquisitions system, the library must assign an identifying number and type. The identifying number allows the vendor and library to refer to the library's SHIPTO or BILLTO address without sending the actual address information in the EDI transaction. The identifying number might be a Standard Address Number (SAN), a number assigned by the vendor or some other number. Assign the TYPE to reflect the type of identifying number assigned:
 - 0 - assigned by seller
 - 1 - Standard Address Number (SAN)
 - 2 - Other

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
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

Enumeration Prediction

This appendix illustrates how the *NUMBERING CODE*, *NUMBER OF PARTS*, *CALENDAR CHANGE*, and *BASE LEVEL* fields of the PUBM - PUBLICATION PATTERN screen affect a complex serial's predicted enumeration.

Enumeration Definition Fields

When defining a publication pattern's enumeration at the PUBM - PUBLICATION PATTERN screen, use the following inter-related fields.

ENUMERATION CAPTION/LABEL

A pattern can have up to 6 levels of enumeration; specify a term for each level you want used. Be sure you include ending punctuation, i.e., v., vol., no., and so forth.

NUMBER OF PARTS

Number of units at this enumeration level which make up a unit at the next higher level.

Used by the system when predicting issues, for determining when to increment the next higher level's counter. For example, if 7 No's make up a Vol the system will add 1 to the Vol counter each time the No counter has gone up 7 times.

NUMBERING CODE

The numbering at this enumeration level is continuous or periodically restarted.

- R Restart the numbering at this enumeration level (back at 1 or A) on a regular basis.
- C Continuous numbering; let the numbering at this level rise indefinitely. If this code is used in conjunction with the *Calendar Change* field, the *Number of Parts* field will be ignored. For example, the system will increment the next higher level's counter based on the dated in the *Calendar Change* field and ignore the value in the *Number of Parts* field.

BASE LEVEL

The base enumeration level; usually the lowest level but in some month-based patterns the next-to-lowest level.

Used by the system when predicting issues, for determining whether a change in month should reset the numbering. The numbering of the lowest and next-to-lowest levels are also be affected by the lowest level's *NUMBERING CODE* (R or C) and *NUMBER OF PARTS* (a number referred to as "M" below).

- Lowest level If you set the *BASE LEVEL* to the **lowest** level (such as 3 in a 3-level pattern), then a change in month will not automatically reset the lowest level's numbering.

- If the lowest level's *NUMBERING CODE* is C (continuous), then the level's numbering continues to increase indefinitely.
- If the code is R (reset), then the level's numbering is reset every M issues.
- In either case, the next higher level's numbering is incremented either every M issues or, if the *Numbering Code* is set to C, at the dates defined in the *Calendar Change* field.

Next-to-lowest
level

If you set the *BASE LEVEL* to the **next-to-lowest** level (such as 2 in a 3-level pattern), then the system can handle patterns with different numbers of issues published each month.

If the lowest level's *NUMBERING CODE* is C (continuous), then that level's numbering increases indefinitely.

- If the code is R (reset), then that level's numbering is reset each time a new month begins (or every M issues, whichever comes first).
- In either case, the next higher level's numbering is incremented each time a new month begins (or every M issues, whichever comes first).

Illustration

A complex month-based pattern with varying number of issues per month has been chosen to illustrate the effect of three of the definition fields.

This sample serial has 3 levels of enumeration:

| | | |
|-----|----|----|
| 1 | 2 | 3 |
| Vol | No | Pt |

and the following regularity pattern:

| | | | | | | | | | | | |
|----|----|----|----|----|----|----|----|----|----|----|----|
| JA | FE | MR | AP | MA | JU | JL | AU | SE | OC | NO | DE |
| 1 | 1 | 3 | 2 | 4 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |

Notice that March, April, and May have 3, 2, and 4 issues, respectively.

The table following shows the effect on the predicted `NO` and `Pt` numbering when you change the pattern definition in 3 ways:

- `Pt`'s *NUMBER OF PARTS* = 4 (true maximum) versus 3
- *BASE LEVEL* = 2 (next-to-lowest level) versus 3 (lowest level)
- `Pt`'s *NUMBERING CODE* = R (resetting) versus C (continuous).

An asterisk (*) marks the issues at which `NO` is incremented. For convenience, only the first 12 issues of the year are shown and the `Vol` numbering is omitted.

NOTE: Many of the resulting predictions are **not** what the library would want for the serial; they are presented here only for comparison. For accurate enumeration, the library would likely specify *NUMBER OF PARTS* = 4, *BASE LEVEL* = 2, and *NUMBERING CODE* = R or C.

PATTERN DEFINITION PREDICTED ENUMERATION (No/Pt)

Pt's NUMBER OF PARTS: 4

BASE LEVEL: 2

```
Vol No Pt JA  FE  MR  ...  ... AP  ... MA  ...  ...  ...  JU
18 4
R R  1/1 2/1 3/1 3/2 3/3 4/1 4/2 5/1 5/2 5/3 5/4 6/1
    *** * * *
R C  1/1 2/2 3/3 3/4 4/5 5/6 5/7 6/8 7/9 7/10 7/11 8/12
    *** * * *
Calendar change: Jan, April, July and October
R C  1/1 2/2 3/3 3/4 3/5 4/6 4/7 5/8 5/9 5/10 5/11 6/12
```

BASE LEVEL: 3

```
Vol No Pt JA  FE  MR  ...  ... AP  ... MA  ...  ...  ...  JU
18 4
R R  1/1 1/2 1/3 1/4 2/1 2/2 2/3 2/4 3/1 3/2 3/3 3/4
    *** * * *
R C  1/1 1/2 1/3 1/4 2/5 2/6 2/7 2/8 3/9 3/10 3/11 3/12
    *** * * *
Calendar change: Jan, April, July and October
R C  1/1 1/2 1/3 1/4 1/5 2/6 2/7 2/8 2/9 2/10 2/11 2/12
```

Pt's NUMBER OF PARTS: 3

BASE LEVEL: 2

```
Vol No Pt JA  FE  MR  ...  ... AP  ... MA  ...  ...  ...  JU
18 4
R R  1/1 2/1 3/1 3/2 3/3 4/1 4/2 5/1 5/2 5/3 6/1 7/1
    *** * * *
R C  1/1 2/2 3/3 4/4 4/5 5/6 6/7 7/8 7/9 8/10 8/11 9/12
    *** * * *
Calendar change: Jan, April, July and October
R C  1/1 2/2 3/3 3/4 3/5 4/6 4/7 5/8 5/9 5/10 5/11 6/12
```

BASE LEVEL: 3

```
Vol No Pt JA  FE  MR  ...  ... AP  ... MA  ...  ...  ...  JU
18 4
R R  1/1 1/2 1/3 2/1 2/2 2/3 3/1 3/2 3/3 4/1 4/2 4/3
    *** * * *
R C  1/1 1/2 1/3 2/4 2/5 2/6 3/7 3/8 3/9 4/10 4/11 4/12
    *** * * *
Calendar change: Jan, April, July and October
R C  1/1 1/2 1/3 1/4 1/5 2/6 2/7 2/8 2/9 2/10 2/11 2/12
```


C

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.

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| 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. |

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| 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

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| 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.

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| 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.

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| 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

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| 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.

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| 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

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| 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”.

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| 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

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| 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. |

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| 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. |

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| 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

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| 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 |

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| | 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.

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| 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 *tag*.
- 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 *prompt* 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.

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