

AFO 311 Receive issues

311.1 Introduction

Search for a bibliographic record using standard search techniques.

The screenshot shows a window titled "Search for a record" with three tabs: "Standard", "System number", and "Z39.50". The "System number" tab is active. The search criteria are as follows:

Enter system number	3214322
Select standard index	Supplier reference no.
Select database	Vubis Smart database release 2

At the bottom left, there is a checkbox labeled "Save settings" which is currently unchecked. On the right side, there is a vertical stack of buttons: "OK", "Cancel", "Help", "New record", "Save lists", "Previous", "Connect", and "Defaults".

On the System number tab, you may search by alternate subscription number, subscription number, SICI and supplier reference number. Searching using the alternate subscription number, subscription number, SICI and supplier reference number may take you directly to the receiving screen. Other index searches will take you to the **Full record** screen from which you select the **Subscription(s)** field and the system displays the **List of subscriptions** screen. From the **List of subscriptions** screen, select the **Receive issues** option.

Note

For SICI index lookups, the system must know the Id of the ISSN index for each database. The system defaults its lookup to Index4 for each database but this may be changed non-interactively for each database. When doing SICI index lookups, the system provides access to the title by parsing the ISSN portion out of the SICI and using this to identify the title. The parsing algorithm involves taking the first 9 characters of the SICI (the fifth character must be a "-") and using these characters to search in the ISSN index. There is no attempt to identify the issue being checked in.

311.2 Determining which subscriptions to receive

Before displaying the Serials **Receiving** screen, the system may display one or both of the following forms:

- **Enter SHIPTO location you are receiving for** form
- **Enter type of holding you are receiving** form

When you select the **Receive issues** 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 subscriptions are being checked in. If the title's subscriptions are linked to more than one SHIPTO CODE, and no default SHIPTO code can be determined, the system displays the **Enter SHIPTO location you are receiving for** form. Select the **SHIPTO code** that you wish to register receipts for.

Determining a default SHIPTO code:

If you select the **Receive issues** option from the **Subscription general data** screen, the system takes the SHIPTO code out of the subscription record to use as a default. Otherwise, the system takes the Default SHIPTO defined in your User defaults record (in AFO 368).

The system then checks to make sure that your default SHIPTO is contained in the list of SHIPTO locations you are allowed to receive (AFO 368). If not, the default is reset.

Skipping the Enter SHIPTO location you are receiving for **form**

This form is skipped under one of two conditions:

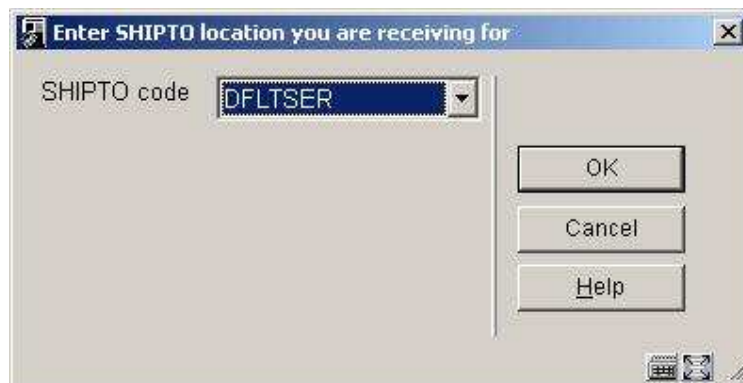
1. You end up with a default specified and the title has subscriptions with this SHIPTO code, the screen is skipped.

2. If the subscriptions for the title all have the same SHIPTO code and you are allowed to receive at that SHIPTO location.

If the system cannot find any subscriptions on the title that you are allowed to receive for, the system displays the message, **"You are not permitted to check in items at any of this title's locations"** and returns to the previous screen.

If the system cannot find any subscriptions on the title matching your default SHIPTO, the system displays the message, **"There are no copies of this title at your default SHIPTO location"**.

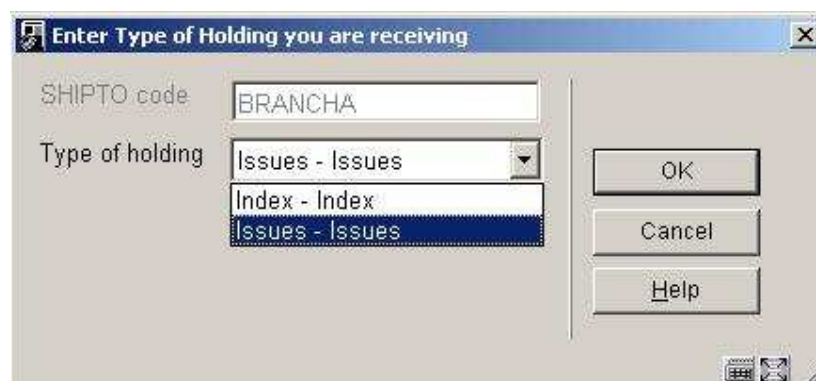
If the system cannot determine a preferred SHIPTO for you to receive and the subscriptions for the title contain more than one SHIPTO, the following form displays:



The screenshot shows a dialog box titled "Enter SHIPTO location you are receiving for". It features a dropdown menu labeled "SHIPTO code" with "DFLT SER" selected. To the right of the dropdown are three buttons: "OK", "Cancel", and "Help". The dialog box has a standard Windows-style title bar with a close button (X) in the top right corner.

SHIPTO code – a dropdown list of SHIPTO codes that you are allowed to receive for this title. Select one of the SHIPTO codes. This SHIPTO code defines where material is being received within the library. A SHIPTO code is assigned to each subscription in the system. Press **OK** to continue with the receiving process.

If the subscriptions for the selected SHIPTO code have more than one Type of holding defined and if the subscriptions do not contain the **Default for serials check-in** (as described in section 321.4.2), the system displays the **Enter type of holding you are receiving** form.



The screenshot shows a dialog box titled "Enter Type of Holding you are receiving". It features a text input field labeled "SHIPTO code" containing "BRANCHA". Below it is a dropdown menu labeled "Type of holding" with a list of options: "Issues - Issues", "Index - Index", and "Issues - Issues" (highlighted). To the right of the dropdown are three buttons: "OK", "Cancel", and "Help". The dialog box has a standard Windows-style title bar with a close button (X) in the top right corner.

SHIPTO code – protected field. Use this field to determine which SHIPTO location you are receiving.

Type of holding – dropdown list of type of holdings linked to the subscriptions for the selected SHIPTO. Select a Type of Holding for the material that you are receiving. Press **OK** to continue with the receiving process.

311.3 Serials receiving screen

The **Receiving** screen displays once the system has narrowed down the SHIPTO location and Type of holding that you are receiving. From this screen you may:

- receive 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
- claim by phone
- manually claim overdue issues
- predict issues beyond the next expected
- update next expected issue information
- barcode issues
- display and update summary holdings statements
- update items (barcoded issues)
- display bibliographic information

- update publication pattern information
- track status changes of issue statuses

The screenshot shows the Vubis Smart software interface. The title bar reads "Vubis Smart - 2.4.2 - [Receiving for dfltser - issues]". The menu bar includes File, Edit, Toolbar, Options, Window, and Help. A toolbar with various icons is visible below the menu. The main area displays bibliographic data for the title "Glass and Ceramics" (ISSN 0361-7610, Imprint New York LLC : Consultants Bureau, An Imprint of Springer Verlag). It shows 25 items filtered by status. The data is presented in a table with columns: No, Numbering, Date, Status, # Copies, Claimed, Barcoded, and Note.

No	Numbering	Date	Status	# Copies	Claimed	Barcoded	Note
1	v.63.no.1(2006:January)	01 Jan 2006	Exp issue	2/2		No	No
2	v.62.no.12(2005:November)	15 Nov 2005	Exp issue	2/2		No	No
3	v.62.no.11(2005:November)	01 Nov 2005	Exp issue	2/2		No	No
4	v.62.no.10(2005:September)	15 Sep 2005	Exp issue	2/2		No	No
5	v.62.no.10(2005:September)	05 Sep 2005	Received	2/2		No	No
6	v.62.no.8(2005:July)	08 Sep 2005	Received	1/2+		Yes	No
7	v.62.no.7(2005:July)	01 Jul 2005	Item due	2/2		No	No
8	v.62.no.6(2005:May)	15 May 2005	Received	2/2		No	No
9	v.62.no.5(2005:May)	05 May 2005	Received	2/2		No	No
10	v.62.no.4(2005:March)	16 Mar 2005	Received	2/2		No	No
11	v.62.no.3(2005:March)	08 Mar 2005	Claimed	2/2	1m:08 Mar 2005	No	Yes
12	v.62.no.2(2005:January)	15 Jan 2005	Received	2/2		No	No
13	v.62.no.1(2005:January)	01 Jan 2005	Received	2/2		Yes	No
14	v.61.no.12(2004:November)	15 Nov 2004	Received	2/2		No	No
15	v.61.no.11(2004:November)	01 Nov 2004	Received	2/2		No	No
16	v.61.no.10(2004:September)	15 Sep 2004	Received	2/2		No	No
17	v.61.no.9(2004:September)	01 Sep 2004	Received	2/2		No	No
18	v.61.no.8(2004:July)	15 Jul 2004	Claimed	2/2	1tel:15 Jul 2004	No	No
19	v.61.no.7(2004:July)	01 Jul 2004	Missing	2/2		No	No
20	v.61.no.6(2004:May)	15 May 2004	Received	2/2		No	No
21	v.61.no.5(2004:May)	01 May 2004	Received	2/2		No	No
22	v.61.no.4(2004:March)	15 Mar 2004	Received	2/2		No	No
23	v.61.no.3(2004:March)	01 Mar 2004	Received	2/2		No	No
24	v.61.no.2(2004:January)	15 Jan 2004	Received	2/2		No	No
25	v.61.no.1(2004:January)	01 Jan 2004	Received	2/2		No	No

The title of the screen is "Receiving for <SHIPTO code> – <Type of holding description>". In this example, the SHIPTO code is DFLTSE and the Type of holding description is Issues.

Brief bibliographic data displays above the grid. This data is protected and includes the fields defined in the !Serial element/group profile record. It also shows the **Filtered by** and **Showing** fields. These two fields have an effect when you turn filtering on to only show issues with specific status.

Below the bibliographic data is a grid containing one row for each issue defined for the selected type of holding.

Columns on the screen

Numbering – enumeration and chronology of the issue.

Date – For expected issues, and issues with any Item due copies, this is the expected receipt date predicted by the system. For other issues, this is the date that the status shown in the box was assigned.

Note

Multiple copy issues may have copies with different statuses but the box shows only one status.

Status - The copies of a non-expected issue of a multiple subscription serial may have different statuses but the box can show only one — the first applicable one from the following list: Received, In Bindery, Missing, Returned, Claimed, Bound, Item due, Withdrawn, Microfilm, Microfiche, Optional 1 to 6. These statuses are defined in section 367.7 – Issue status codes. Any status code with a setting to **Treat as received** will display with the Received status.

Copies - For multiple subscription serials, this column tells you how many copies have the displayed status and how many copies are/were predicted; for example, Received 2/2 means both copies of the item have been “received”. If the copies have different statuses, the system adds a plus sign; for example, Received 1/2+ means one of the two copies of the item has been “received” but the other copy has a different status. If all of the subscriptions are inactive, the counter is 0/0 for expected issues (because none are really expected).

Claimed – this field displays whether the issue has been claimed. The format of display is #AAA:date where # represents the number of times claimed, AAA is either m (missing issue claim), s (stagnating subscription claim) or tel (claim made by telephone) and date is the claim date.

Barcoded – indicates whether this issue has been barcoded.

Note – indicates whether this issue has public and/or staff notes attached to it.

Notes

- if an issue is not completely received, the **Status** field displays in bold and an arrow icon displays in the first column.
- when you enter this screen, the next expected issue displays on the fourth line. Three additional future predictions are displayed in lines one to three.
- when you receive the expected issue displayed on the first line (instead of the next expected on the fourth line), all expected issues below that will automatically be assigned the status Item due.
- when you receive the expected issue displayed on the first line, the system automatically adds four new future predictions, so the next expected issue displays again on the fourth line.

- when you choose the magic wand, the system predicts three more future issues for you; but when you leave this screen the system does not save the future predictions.
- when you leave the receiving screen using the **Back** button, the system may prompt again for **Enter SHIPTO location you are receiving for** and/or **Enter type of holding you are receiving**. This does not happen when you leave this screen using the **STOP** button.

Options on the screen

Return to search screen [X] – use this option to leave the **Receiving** screen and return back to the **Search for a record** form to retrieve another serial title.

Register receipt [*] – use this option to register receipts (i.e. mark issues as received). Please refer to section [311.3.1](#).

Modify issue data [M*] - use this option to change next expected information, change statuses, initiate manual or telephone claims, display status history. Please refer to section [311.3.2](#).

Insert above issue [I*] – use this option when you receive an unexpected special issue, or receive an extra copy of an issue you are entitled to. You cannot insert an issue before the next expected issue - that is, above issue 4 of the Receiving screen. Please refer to section [311.3.3](#).

Delete issue data ([S*] use this option to delete issue information for the selected issue. Please refer to section [311.3.4](#).

Move issue [M] – use this option to change the order of display of the issue in the grid. Please refer to section [311.3.5](#).

Home [H] – if you have paged forward to the next screen(s) of receipt data, press this Icon to quickly get back to the initial Receiving screen showing the next expected issues.

Predict next three [V] – use this option to make three more predictions.

Filter by [R] – use this option to show issues with specific status(es). I.e. all claimed issues, all in bindery issues, etc. Please refer to section [311.3.6](#).

Item display [D*] – use this option to display barcodes attached to the selected issue. Please refer to section [311.3.7](#).

View bib [G] – use this option to view the bibliographic record in read-only mode.

Holdings statement [HS] – use this option to view and update holdings statements for the subscriptions at this SHIPTO location. Please refer to section [311.3.8](#).

Publication pattern [P] – use this option to change the publication pattern or next expected information attached to the subscriptions you are receiving. Please refer to section 321.5.

311.3.1 Register receipt

Select the issue that you wish to receive and choose the **Register receipt** icon. If the selected issue is completely received, the system displays a message, **“No copies left to receive”**.

If there is more than one copy left to receive, the system displays the **Enter copies to receive** form:



Fields on the screen

Enter copies to receive – defaults to the number of copies left to receive. Enter the number of copies of the selected issue that you are receiving. This field is used later in the receiving process as an integrity check. If you receive fewer or more copies than you specify here, the system will warn you.

Note

If your User defaults record (AFO 368) is not set up to **Prompt for additional information** and you are receiving the total number of copies left to receive, the system registers receipt of the number of copies specified and returns to the **Receiving** screen.

Otherwise, the system displays the **Register receipt** form:

N	Subscription	Shelfmark	Receive (*)	Barcode	URL	Public note	Staff note	Supplier	Route
1	65	PNB BD PER.1234	Y	No	No	No	No	Acme Book Corr	Y
2	66	PNB BD PER.1234	Y	No	No	No	No	OXLEY LTD (OXI	N

Fields on the screen

Numbering – enumeration and chronology of the issue. Not updateable.

Issue title – displays the special title assigned to this issue. Not updateable.

Expected date – expected receipt date of the issue. Not updateable.

Grid information – one row displays for each subscription at the selected SHIPTO location. Columns in which you can use F8 (or type in ?L) to open up a form are denoted by (*).

Columns on the screen

Subscription – subscription number. Not updateable.

Shelfmark – current shelfmark for the subscription. Not updateable.

Receive (*) – enter Y or N in this field to indicate whether you are receiving the issue for the selected subscription. Enter (or type in ?L) in this field to open up the detailed **Register receipt** form which allows you to barcode the issue, enter public and staff notes, URL information, etc. Please refer to section [311.3.1.1](#) for more details on editing the detailed form.

Barcode – if this cell is grey in colour, you are not allowed to barcode issues for this subscription (i.e. subscription has no shelfmark or does not have the **Barcode issue** field set). The display in the field is Yes or No to indicate whether the issue is barcoded for this subscription. Not updateable.

URL – if this cell is grey in colour, you are not allowed to enter URL information for this subscription (i.e. subscription's **Format** field is set to Print only). The display in the field is Yes or No to indicate whether the issue has URL information for this subscription. Not updateable.

Public note – The display in the field is Yes or No to indicate whether the issue has a public note for this subscription. Not updateable.

Staff note – The display in the field is Yes or No to indicate whether the issue has a staff note for this subscription. Not updateable.

Supplier – the missing issues supplier attached to the subscription. Not updateable.

Route – Whether or not the subscription is routed. Not updateable.

Press **OK** to register receipts for each of the subscriptions with Y in the **Receive** column. The system checks if there is a discrepancy between the number of copies you indicated on the **Enter copies to receive** form and the number you received. If there is a discrepancy, the system displays one of two messages, **“Receiving fewer items than specified”** or **“Receiving more items than specified”**. Press **OK** to continue registering receipts. Press **Cancel** to abandon the registration. If you have assigned barcodes to any of the received issues, the system now displays the **Enter a new item** form for each of these barcodes. Please refer to section [311.3.1.2](#). If any of the subscriptions you received are routed, the system will now either print out a routing slip immediately or send an entry to AFO 344 (dependent on the settings in your User default record – AFO 368). After the receipts have been registered, the system redisplay the **Receiving** screen with updated information.

No	Numbering	Date	Status	# Copies	Claimed	Barcoded	Note
➔	1 v.63.no.1(2006:January)	01 Jan 2006	Exp issue	2/2		No	No
➔	2 v.62.no.12(2005:November)	15 Nov 2005	Exp issue	2/2		No	No
➔	3 v.62.no.11(2005:November)	01 Nov 2005	Exp issue	2/2		No	No
➔	4 v.62.no.10(2005:September)	15 Sep 2005	Exp issue	2/2		No	No
	5 v.62.no.9(2005:September)	05 Sep 2005	Received	2/2		No	No
➔	6 v.62.no.8(2005:July)	08 Sep 2005	Received	1/2+		Yes	No
➔	7 v.62.no.7(2005:July)	01 Jul 2005	Item due	2/2		No	No
	8 v.62.no.6(2005:May)	15 May 2005	Received	2/2		No	No

From our example, we see that 1 of 2 copies was received and barcoded.

311.3.1.1 Register receipt details

After entering F8 (or typing ?L) in the **Receive** column of the **Register receipt** grid, the system displays the detailed **Register receipt** form:

Register receipt

Subscription: 66

Shelfmark: PNB BD PER.1234

Receive:

Barcode: 399994321231

URL:

URL path:

Public note:

Staff note:

Supplier: Acme Book Company (ACMEBOO

Route:

OK

Cancel

Help

Fields on the screen

Subscription – display only. The subscription number assigned to this subscription.

Shelfmark – display only. The shelfmark assigned to this subscription.

Receive – if checked, the system will register a receipt of the issue for this subscription.

Barcode – if the subscription has the **Barcode issues** flag set and if you barcode issues at time of receipt, enter the barcode here.

URL – if the subscription has a **Format** that supports receipt of electronic material, enter the URL here.

URL path – if the subscription has a **Format** that supports receipt of electronic material, enter the URL path here.

Public note – enter a public note that is specific to this copy of the issue.

Staff note – enter a staff note that is specific to this copy of the issue.

Supplier – display only. Missing issues supplier attached to the subscription.

Route – display only. If checked, the subscription is the routing copy.

Press **OK** to save your changes.

311.3.1.2 Enter a new item form

If you have assigned barcodes to any of the received issues, the system now displays the **Enter a new item** form in succession for each of these barcodes. At this stage, you can change the defaults assigned by the system. Press **OK** to add the new barcode to the system. If you press **Cancel**, the new barcode will not be added.

Enter a new item

Barcode: 399994321231

Institution: PNB

Location code: BD - BD

Sublocation code:

Shelfmark classification: PER.1234

Shelfmark set: 1 - *c: - no binding - received

Item category: 16 (BO)

Numbering: v.62: no.8(2005:July)

Annotation:

Statistical category:

Attachment:

Permission slip:

Cost:

Impression:

Item data:

Product category:

Number of parts:

Part title:

Save settings

OK
Cancel
Help
Defaults

311.3.2 Modify issue data

Select an issue from the grid and click on the **Modify issue data** option to change statuses, barcode issues, initiate manual or telephone claims and display status history changes.

The system displays the **Modify issue** screen:

The screenshot shows the 'Yubis Smart - 2.4.2 - [Modify issue]' window. At the top, there is a menu bar (File, Edit, Toolbar, Options, Window, Help) and a toolbar with icons for navigation and actions. Below the toolbar, a text box displays bibliographic information:

Title: Glass and Ceramics
 ISSN: 0361-7610
 Imprint: New York LLC.: Consultants Bureau, An Imprint of Springer Verlag
 Numbering: v.62: no.8(2005:July)

Below this is a table with the following columns: No, Subscription, Shelfmark, Status, Date, Barcode, EH, Public note, Staff note, Supplier, and Route.

No	Subscription	Shelfmark	Status	Date	Barcode	EH	Public note	Staff note	Supplier	Route
1	65	PNB BD PER.1234	Item due	15 Jul 2005	No	No	No	No	Acme Book Company (ACME)	Yes
2	66	PNB BD PER.1234	Received	08 Sep 2005	Yes	No	No	No	Acme Book Company (ACME)	Yes

At the bottom of the window, a status bar shows 'Connected', '311', 'PNB/BD', 'JNS', 'CAPS', 'NUM', and '3:48 PM'.

Brief bibliographic data displays above the grid. This data is protected and includes the fields defined in the !Serial element/group profile record. It also shows the **Numbering** of the issue that you selected from the **Receiving** screen.

Columns on the screen

Subscription – the subscription number assigned to this subscription.

Shelfmark – the shelfmark assigned to this subscription.

Status – the status assigned to the issue for this subscription. The status is one of those defined in section 367.7 – Issue status codes. Possible statuses include Received, Returned, Claimed, Next expected, Missing, In bindery, Bound, Item due, Withdrawn, etc.

Date – the date associated with the issue status.

Barcode – the display in the column is Yes or No to indicate whether the issue is barcoded for this subscription. Not updateable.

EH – electronic holdings field. The display in the column is Yes or No to indicate whether the issue has URL information for this subscription. Not updateable.

Public note – The display in the column is Yes or No to indicate whether the issue has a public note for this subscription. Not updateable.

Staff note – the display in the column is Yes or No to indicate whether the issue has a staff note for this subscription.

Supplier – the missing issues supplier attached to the subscription.

Route – the display in the column is Yes or No to indicate whether the subscription is the routing copy.

Options on the screen

Modify [*] - Select one of the subscriptions and click this option to change the status, barcode the issue, add/update notes. Please refer to section [311.3.2.1](#).

History [H] – Use this option to display a history of the status changes for this issue. Please refer to section [311.3.2.2](#)

Modify part [M] – Use this option to change the numbering or issue title information. Please refer to section [311.3.2.3](#).

Manual claim [R*] – Select one of the subscriptions and click on this option to manually claim the issue. Please refer to section [311.3.2.4](#).

Claim by phone [T*] – Select one of the subscriptions and click on this option to claim by telephone. Please refer to section [311.3.2.5](#).

311.3.2.1 Modify issue

Select one of the subscriptions and click the **Modify** option on the **Modify issue** screen. The system displays the detailed **Modify issue** form:

The image shows a 'Modify issue' dialog box with the following fields and controls:

- Numbering:** Input field containing 'y.62:no.8(2005:July)'
- Issue title:** Empty input field
- Subscription:** Input field containing '65'
- Shelfmark:** Input field containing 'PNB BD PER.1234 c.'
- Status:** Dropdown menu showing '11 - Item due'
- Status date:** Dropdown menu showing '7 /15/2005'
- Barcode:** Empty input field
- URL:** Empty input field
- URL path:** Empty input field
- Public note:** Empty text area
- Staff note:** Empty text area
- Last claimed:** Empty input field
- Times claimed:** Empty input field
- Claimed by phone:** Check box (unchecked)
- Supplier:** Input field containing 'Acme Book Company (ACMEBOO'
- Route:** Check box (unchecked)
- Expected date:** Input field containing '15 Jul 2005'

Buttons on the right side: OK, Cancel, Help.

Fields on the screen

Numbering – display only. Enumeration and chronology of the issue.

Issue title – display only. The special title assigned to this issue.

Subscription – display only. The subscription number assigned to this subscription.

Shelfmark – display only. The shelfmark assigned to this subscription.

Status - the status assigned to the issue for this subscription. The status is one of those defined in section 367.7 – Issue status codes. Possible statuses include:

- 1 – Received - The library has received an issue for this subscription. If you register receipt of an issue on a screen, the system automatically assigns this status to all active copies of the issues. The system prints a routing list slip if required.
- 2 – Returned - The library received this copy but then returned it to the supplier.
- 3 – Claimed - The library has created a claim for this copy. The system can automatically generate claims for late Expected and Item due copies. You can manually create a claim by assigning the Claimed status to a copy here. To remove the claim, assign a different status (such as Received or Missing) to the copy.
- 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 subscription of the serial. The Exp statuses can only be assigned by the system, to issues that it has predicted. If you receive 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.
- 8 - In Bindery - The library has sent this received copy to be bound.
- 9 – Bound - This received copy has been bound.
- 10 - No action - The system removes this copy line from the issue definition when you return to the Receiving screen. This status can be assigned at any time. For example, if you get 5 copies of an issue of a 4-subscription serial, you would Receive the first 4 of them against the supplied issue. In addition, you could use the Insert after issue icon to create 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 subscriptions 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 assigns this status to any issues with a status Expected that are below the issue that you receive. The system automatically generates claims for late Expected and Item due copies.
- 12 – Withdrawn - This received copy is withdrawn.
- 13 – Microfilm, 14 – Microfiche - Use these statuses to denote that the library has holdings on microfilm or microfiche. First delete all receipts boxes for the paper issues that were transferred to microfilm or microfiche. Then use the **Insert after issue** icon to insert a new issue. In the **Numbering** field enter enough information to identify the microfilm or microfiche (i.e. 1993-1994). Make sure you assign 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 section 367.2.6 – Issue status codes.
- 21 - Not expected - The part is not expected by the subscriptions at the selected SHIPTO location.

Status date - the date associated with the issue status

Barcode – if the subscription has the **Barcode issues** flag set and if you barcode issues at time of receipt, enter the barcode here.

URL – if the subscription has a **Format** that supports receipt of electronic material, enter the URL here.

URL path – if the subscription has a **Format** that supports receipt of electronic material, enter the URL path here.

Public note – enter a public note that is specific to this copy of the issue.

Staff note – enter a staff note that is specific to this copy of the issue.

Last claimed – display only. Date that claim was last printed.

Times claimed – display only. Number of times claimed followed by type of claim:

- m - missing issue
- s - stagnating
- tel - telephone

Claimed by phone – display only. If checked, this item was claimed by phone.

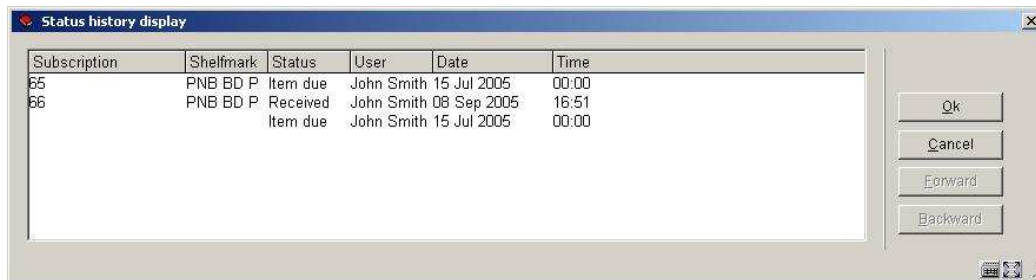
Supplier – display only. Missing issues supplier attached to the subscription.

Route – display only. If checked, the subscription is the routing copy.

Expected date – display only. Expected receipt date of the issue.

311.3.2.2 Status history display

Select one of the subscriptions from the list and choose the **History** icon. The system displays the **Status history display** form. This form allows you to track the status changes made to a copy. The system stores the changed status, the ID of the staff member who made the change, and the date and time of the change for each status change made to a copy.



Subscription	Shelfmark	Status	User	Date	Time
65	PNB BD P	Item due	John Smith	15 Jul 2005	00:00
66	PNB BD P	Received	John Smith	08 Sep 2005	16:51
		Item due	John Smith	15 Jul 2005	00:00

The display includes one line for each status change that has occurred on each copy. For this example, the status of the issue for subscription 66 changed from Item due to Received on September 8, 2005.

311.3.2.3 Modify numbering information

Select the **Modify part** icon to change the **Numbering** of the issue. The following form is displayed:

	v.	no.	(Year)	(Month) (*)
Numbering	62	8	2005	July

Issue title

Suppress captions

Annotation

OK
Cancel
Help

Fields on the screen

Numbering - Contains issue enumeration (volume numbering) and issue chronology (cover date). This information is either predicted by the system or can be entered by you in this field. One column displays for each level of enumeration and chronology defined in this issue's publication pattern. For chronology fields that have chronology codes with valid predictions (i.e. months, days of week, seasons), you can press F8 (or type in ?L) to see a list of valid entries. In this case, the system will verify that you enter a valid prediction in the field.

If you edit the numbering of the next expected issue, the system changes the current field and future predictions.

Issue title – special title associated with this part.

Suppress captions – if not checked, the system uses the captions defined in the publication pattern when printing out the Numbering of the issue. For example, v.62:no.8(2005:July). If checked, the captions are ignored and the system prints out what is in the numbering field. This is useful if you wish to receive an annual Index at the end of the year without creating a separate type of holding/publication pattern record for it. In this case, enter Index.2005 into the first column of the Numbering field, clear any other data out of the remaining columns and check the Suppress captions field. The system will display Index.2005 as the numbering for this part.

Annotation – enter a note about this part.

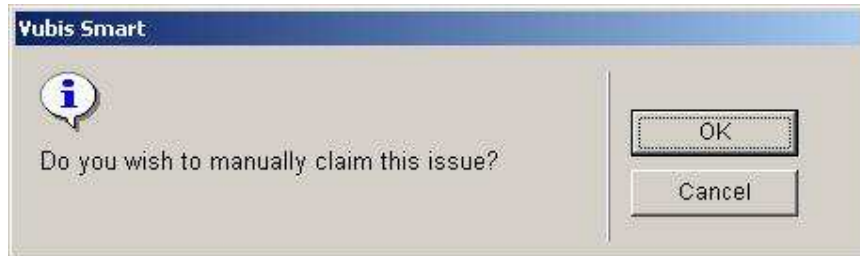
Note

Please remember that a part is shared by all of the subscriptions for a title that expect the same type of holding. For example, if your library has 5 subscriptions for the paper issues of a journal and you change the Numbering of v.62:no.8 to v.62:no.8A, the change affects all 5 subscriptions.

311.3.2.4 Create manual claims

There are two ways to manually claim overdue issues:

1. on the **Modify Receipt** form, set the Status to Claimed
2. from the **Modify receipt** screen, select one of the subscriptions and choose the **Manual claim** icon. If the latter is chosen, the system asks the question,



Answer **OK** to create the claim. When you go back to the **Receiving** screen, the system will switch to the standard form for generating output. This will generate a claim according to the defined claim cycle.

If you use the **Manual claim** option for an issue that is already claimed, the system responds with, "Issue has already been claimed. Do you wish to manually generate the next claim?". If you have already reached the last claim in the claim cycle, using this option will force the system to print another claim. Which means that you can actually send more than the maximum of 3 defined claims.



Select **OK** to print the claim immediately to the selected device. Select **Cancel** to generate the claim for later printing in AFO 351/352/353.

311.3.2.5 Claim by telephone

If you wish to keep track of the fact that you made a telephone claim for overdue items, select one of the subscriptions and choose the **Claim by phone** icon on the **Modify receipt** screen. The system displays the **Claim by phone** form:

Fields on the screen

Last claim date – display only. Last date claimed by telephone.

Last contact person – display only. Contact person at supplier that received the telephone claim.

Last remarks – display only. Remarks entered by person who made the telephone claim.

Claim date – defaults to today's date. If you are recording a telephone claim, enter a date here.

Contact person – if you are recording a telephone claim, enter the person that you called.

Remarks – if you are recording a telephone claim, enter any special information that the contact person told you.

Press **OK** to create a new telephone claim. Press **Cancel** to leave the form without creating another claim. If you choose the **Claim by phone** icon for a subscription that is already claimed by phone, the system fills in the first three fields with the information entered into the previous telephone claim.

311.3.3 Insert an unpredicted issue

When you use the **Insert above issue** option from the **Receiving** screen to insert a new issue, the system displays the **Insert an issue** form. The fields default to the values from the line you specified when you used the insert option. Thus, if you inserted above the issue on line 7, the system copies the values from the fields for line 7, and reproduces them on a new form.

v.	no.	(Year)	(Month) (*)
Index.2004			

Issue title

Suppress captions

Annotation

N	Subscription	Shelfmark	Status (*)	Barc	URL	Public note	Staff	Supplier
1	65	PNB BD PER.12	1 - Receive	No	No	No	No	Acme Book Comps
2	66	PNB BD PER.12	1 - Receive	No	No	No	No	OXLEY LTD (OXL -

Fields on the screen

Numbering - Contains issue enumeration (volume numbering) and issue chronology (cover date). This information is defaulted to the values from the line you specified when you used the insert option. You can override this information by entering your own numbering into the columns. One column displays for each level of enumeration and chronology defined in this issue's publication pattern. For chronology fields that have chronology codes with valid predictions (i.e. months, days of week, seasons), you can press F8 (or type in ?L) to see a list of valid entries. In this case, the system will verify that you enter a valid prediction in the field.

Issue title – special title associated with this part.

Suppress captions – if not checked, the system uses the captions defined in the publication pattern when printing out the Numbering of the issue. For example, v.61:no.12(2004:November). If checked, the captions are ignored and the system prints out what is in the numbering field. This is useful if you wish to receive an annual Index at the end of the year without creating a separate type of holding/publication pattern record for it. In this case, enter Index.2004 into the first column of the **Numbering** field, clear any other data out of the remaining columns and check the **Suppress captions** field. The system will display Index.2004 as the numbering for this part.

Annotation – enter a note about this part.

Note

You cannot insert an issue with copies expected in the future.

Columns on the screen

Subscription – subscription number. Not updateable.

Shelfmark – current shelfmark for the subscription. Not updateable.

Status (*) – To assign a status to a copy, enter a numeric Issue status code as previously described in section [311.3.2.1](#). You can also enter F8 (or type in ?L) in this field to open up the detailed **Insert issue** form which allows you to barcode the issue, enter public and staff notes, URL information, change the date, etc. Fields in which you can use F8 (or type in ?L) to open a detailed form are denoted by (*). Please refer to section [311.3.3.1](#) for a description of the detailed form.

Barcode – if this cell is grey in colour, you are not allowed to barcode issues for this subscription (i.e. subscription has no shelfmark or does not have **Barcode issues** field set). The display in the field is Yes or No to indicate whether the issue is barcoded for this subscription. Not updateable.

URL – if this cell is grey in colour, you are not allowed to enter URL information for this subscription (i.e. subscription's **Format** field is set to Print only). The display in the field is Yes or No to indicate whether the issue has URL information for this subscription. Not updateable.

Public note – The display in the field is Yes or No to indicate whether the issue has a public note for this subscription. Not updateable.

Staff note – The display in the field is Yes or No to indicate whether the issue has a staff note for this subscription. Not updateable.

Supplier – the missing issues supplier attached to the subscription. Not updateable.

Route – Whether or not the subscription is routed. Not updateable.

When you press **OK**, the system creates an entry for each of the subscriptions with a status other than No action in the Status column. If you have assigned barcodes to any of the received issues, the system now displays the **Enter a new item** form for each of these barcodes. Please refer to section [311.3.1.2](#). If any of the subscriptions you received are routed, the system will now either print out a routing slip immediately or send an entry to AFO 344 (dependent on the settings in your User default record – AFO 368). After the receipts have been registered, the system redisplay the **Receiving** screen with updated information.

311.3.3.1 Insert issues details

When you press F8 (or type in ?L) in the **Status** column of the **Insert issues** form, the detailed **Insert issue** form displays.

Insert issue

Subscription: 65

Shelfmark: PNB BD PER.1234

Status: 1 - Received

Status date: 9 /13/2005

Barcode:

URL:

URL path:

Public note:

Staff note:

Supplier: Acme Book Company (ACMEBOO)

Route:

OK

Cancel

Help

Fields on the screen

Subscription – display only. The subscription number assigned to this subscription.

Shelfmark – display only. The shelfmark assigned to this subscription.

Status - assign a status to a copy. Enter a numeric Issue status code as previously described in section [311.3.2.1](#).

Status date – enter the date associated with the issue status.

Barcode – if the subscription has the **Barcode issues** flag set and if you barcode issues at time of receipt, enter the barcode here.

URL – if the subscription has a **Format** that supports receipt of electronic material, enter the URL here.

URL path – if the subscription has a **Format** that supports receipt of electronic material, enter the URL path here.

Public note – enter a public note that is specific to this copy of the issue.

Staff note – enter a staff note that is specific to this copy of the issue.

Supplier – display only. Missing issues supplier attached to the subscription.

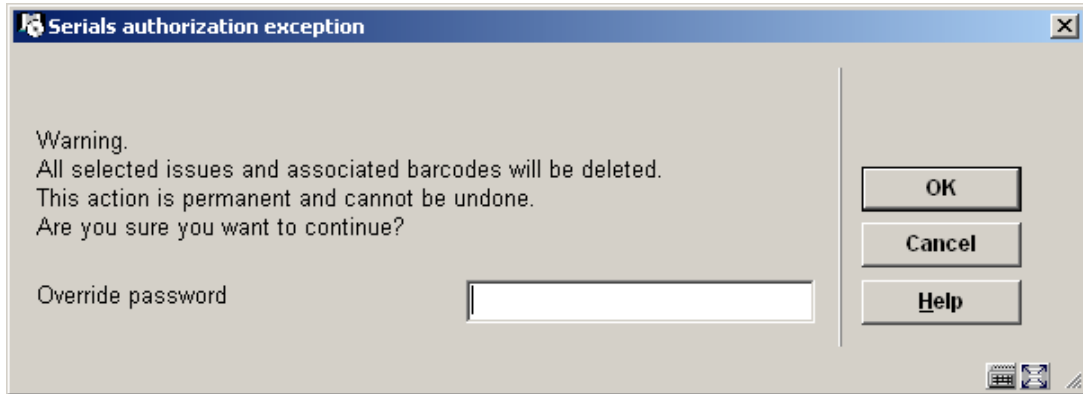
Route – display only. If checked, the subscription is the routing copy.

311.3.4 Delete an issue

Select one (or more) of the issues from the **Receiving** screen and choose the **Delete issue** icon to delete information for the selected issue(s). You cannot delete the expected issues at the top of the screen. The system displays the message, "**Do you wish to delete issue information?**" Answer **OK** to go ahead and delete, or **Cancel** to not delete it. If you answer **OK**, the system checks to ensure that the parts can be deleted. If no errors are encountered, the system deletes the holdings for the current SHIPTO location from the selected parts record(s). If there are holdings for other SHIPTO locations in the parts record(s), the issue 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 the current SHIPTO location. If there are no other holdings for this part on the system, the entire line is deleted from the display. Use this option to remove an issue inserted in error or an unpublished issue. This delete option deletes receipt information from all of the subscriptions for the current SHIPTO location. If you wish to delete receipt information from one specific subscription only, use the **Delete** option on the **Receipt information** screen after choosing the **Receipt information** option on the **Subscription general data** screen (see section 321.3.4).

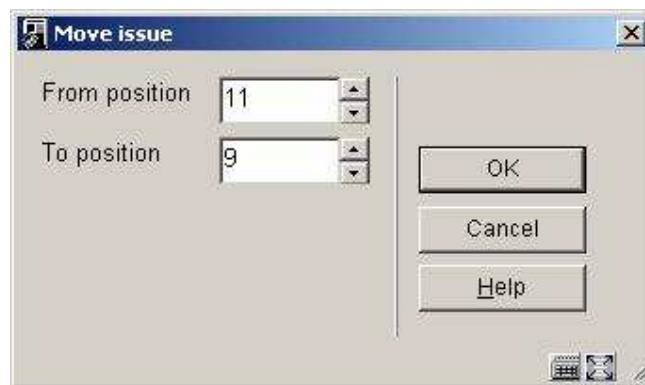
Note

Depending on parameter settings in AFO 367 – Miscellaneous, you may be prompted for an additional password when you try to delete more than 1 issue at the same time:



311.3.5 Move an issue

Allows you to change the order of display of the issues on the **Receiving** screen. You cannot move an issue above the next expected issues. After selecting this option from the **Receiving** screen, the system prompts with the form.



Fields on the screen

From position – enter the line position of the issue you want to move

To position – enter the line position that you want to issue to move to. If you move an issue upwards in the list, the To position equals the final position in the list. In our example, the issue formerly at line 11 will be moved to line 9. The issue formerly at line 9 will now display on line 10. If you move an issue downwards in the list, the issue will be moved to the position below that defined by the To position. For example, if you moved an issue from line 9 to line 11, the issue will display under the former contents of line 11.

311.3.6 Filtering contents of receiving screen

Use the **Filter by** option to restrict what you see on the **Receiving** screen. The system displays the **Filter by** form.



Fields on the screen

Status – select one or more statuses. The system will show you only issues with these statuses.

Barcoded issues – if checked, the system will show only issues that have been barcoded.

Use the **Clear all** button to clear previous filtering restrictions. Press **OK** to return to the **Receiving** screen. The header portion of the **Receiving** screen will be updated with your new filter restrictions. Also, the system will display issue information according to your filter restrictions.

In the example, we have selected to display only claimed issues. After pressing **OK**, we return to the **Receiving** screen.

No	Numbering	Date	Status	# Copies	Claimed	Barcoded	Note
1	v.62: no.7(2005:July)	09 Sep 2005	Claimed	1/2+		No	No
2	v.62: no.3(2005:March)	08 Mar 2005	Claimed	2/2	1m:08 Mar 2005	No	Yes
3	v.61: no.8(2004:July)	15 Jul 2004	Claimed	2/2	1tel:15 Jul 2004	No	No

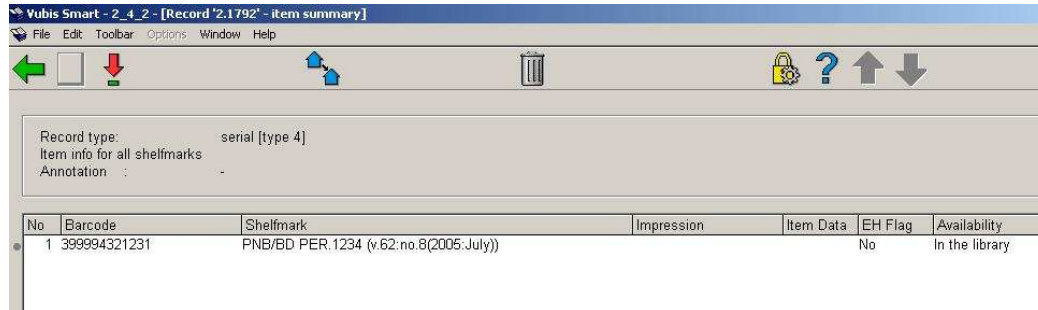
Notice that the header has been updated to let us know that we are only displaying Claimed issues. Only 3 out of 25 issues have the Claimed status.

Note

Filters remain in effect after you leave the **Receiving** screen. Use the **Clear all** button on the **Filter by** form to reset the filter.

311.3.7 Item display

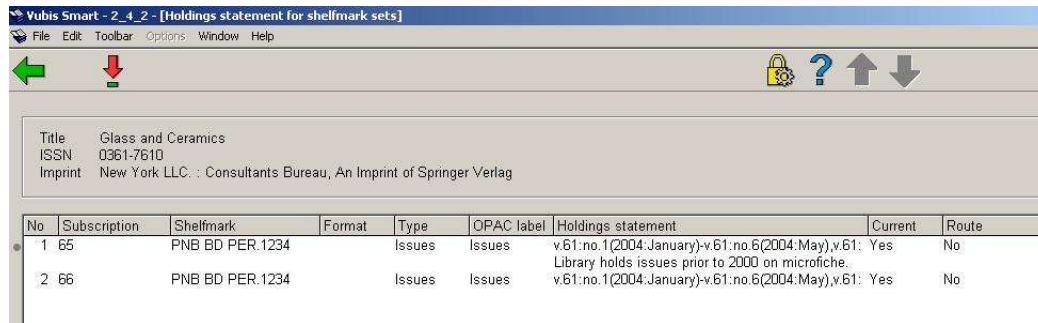
From the **Receiving** screen, select a line that has the **Barcoded** column set to Yes and then choose the **Item display** icon. The system displays the **Item summary** screen for the selected issue.



You are not allowed to add new barcodes, only update/delete barcodes that have already been created for the selected issue. If you wish to add a barcode to an issue, use the **Modify issue** icon from the **Receiving** screen.

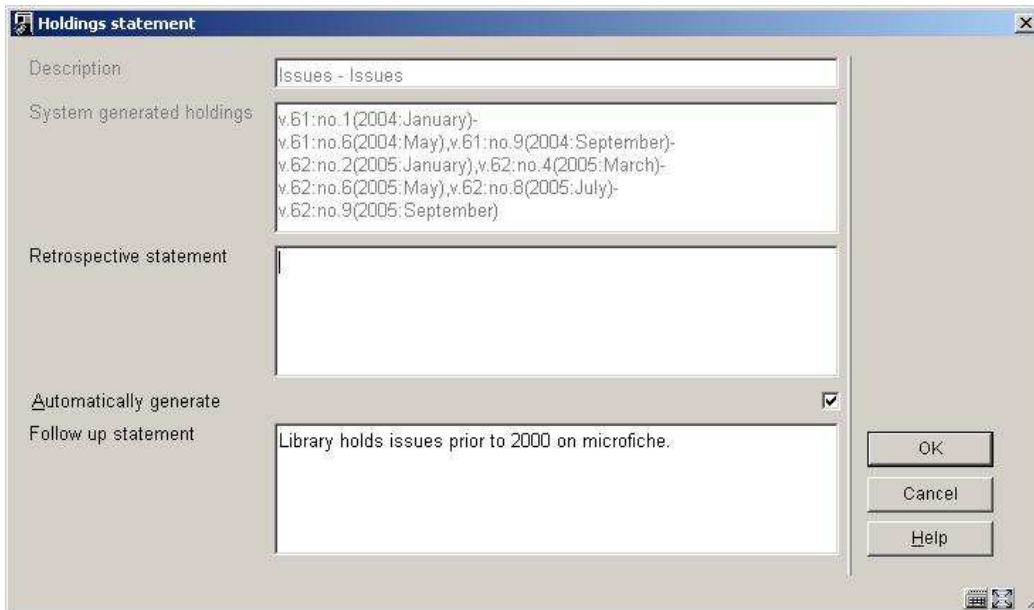
311.3.8 Update holdings statement

If you select the **Holdings statement** icon from the **Receiving** screen, the system displays the **Holdings statement for shelfmark sets** screen.



The system displays the summary holdings statement for each subscription at the current SHIPTO location.

Double-click one of the entries to update the holdings statement for one of the subscriptions. The system responds by displaying the **Holdings statement** form. Please refer to section 321.4.3 for a detailed explanation of the fields on this form.



Notice the holdings statement that the system has automatically generated for this location. It has taken into account that v.61:no.7, v.61:no.8, v.62:no.3 and v.62:no.7 are not yet received.

This statement displays in the WebOpac as

<i>Location</i>	BD : PER.1234	1 or more copies available
Issues		
v.61:no.1(2004:January)-v.61:no.6(2004:May),v.61:no.9(2004:September)-v.62:no.2 (2005:January),v.62:no.4(2005:March)-v.62:no.6(2005:May),v.62:no.8(2005:July)- v.62:no.9(2005:September)		
Library holds issues prior to 2000 on microfiche.		
Last received issue v.62:no.9(2005:September) - [05-09-2005]		

If you turn off the **Automatically generate** holdings flag, the system displays only what you put into the **Retrospective statement** and **Follow up statement** fields. You might prefer to list this subscription's holdings as follows:

Holdings statement

Description: Issues - Issues

System generated holdings:

Retrospective statement: v.61:no.1 - present
Missing issues: v.61:no.7, v.61:no.8,v.62:no.3,v.62:no.7

Automatically generate Follow up statement: Library holds issues prior to 2000 on microfiche.

OK
Cancel
Help

The resulting WebOpac display follows.

Location **BD : PER.1234** **1 or more copies available**

Issues
v.61:no.1 - present
Missing issues: v.61:no.7, v.61:no.8,v.62:no.3,v.62:no.7
Library holds issues prior to 2000 on microfiche.
Last received issue v.62:no.9(2005:September) - [05-09-2005]

- **Document control - Change History**

Version	Date	Change description	Author
1.0	July 2006	creation (complete revision for release 2.4.2 serials modifications)	
2.0	March 2007	added clarification of manual claiming	
3.0	November 2007	added info on override password for deleting multiple received issues	