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1 Print Templates

The names of the Print template files for Serials are as follows (where \( nn \) is a number link identifying the version). These files can be found in the `form.lng` directory of the BIB library. To read more about printing, go to the Printing chapter.

GUI Templates

<table>
<thead>
<tr>
<th>Template</th>
<th>Purpose</th>
<th>print.ini function name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Label serial-item-label-nn</td>
<td>The label which is printed during check-in (if so indicated for that subscription).</td>
<td>ItemArrival</td>
</tr>
<tr>
<td>Regular Label item-issue-label-nn nn=These numbers run from 00-19</td>
<td>The label which is printed when you highlight an issue-type item and click Print Label on the Arrival form.</td>
<td>ItemLabel</td>
</tr>
<tr>
<td>Regular or Spine Label item-issue-label-nn nn=These numbers run from 20-39</td>
<td>The label which is printed when you highlight an issue-type item and click Print Label on the Arrival form.</td>
<td>ItemLabel</td>
</tr>
<tr>
<td>Claim Letter (GUI) serial-claim-letter-nn nn=These numbers run from 01-04</td>
<td>The claim form is produced when you claim an item from the Check-in List of the Serials module.</td>
<td>ClaimLetter</td>
</tr>
<tr>
<td>Routing List serial-rout-list.xsl</td>
<td>The list of routing list members is printed during check-in for titles that are routed. Also the routing list printed when you select a routing group on the Routing List display in the upper pane and click Print.</td>
<td>RoutList RoutReturn ItemArrival</td>
</tr>
<tr>
<td>Subscription Information copy-info.xsl</td>
<td>The Subscription Information form is printed when you click Print on the Subscription list in the subscription display in the upper pane.</td>
<td>CopyInfo</td>
</tr>
</tbody>
</table>

Services Templates

<table>
<thead>
<tr>
<th>Template</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrived Issues arrived-issues.xsl</td>
<td>The report lists the serial items that have arrived in a defined period by the Print Arrived Issues (serial-06) service.</td>
</tr>
<tr>
<td>Claim Letter/Report (Services) batch-serial-claim-letter-00</td>
<td>The claim form used when claiming is carried out by the Print Serials Claim Letters (serial-44) service.</td>
</tr>
<tr>
<td>Routing Letter</td>
<td>The letter sent to members of routing lists by the Letters to</td>
</tr>
<tr>
<td>Serial-rout-letter-nn</td>
<td>Routing List Members (serial-08) service.</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>------------------------------------------</td>
</tr>
<tr>
<td>Claim Report for Unreceived Serial Orders acq-serials-claim-report.xsl</td>
<td>The form which is sent to vendors to claim serial titles on an order where no issues at all were received. (This is not the same as claiming for individual issues). Printed by the Claim Report and Letters for Serials Orders (acq-19) service.</td>
</tr>
<tr>
<td>Subscription Renewal acq-sub-renewal-list-nn</td>
<td>The subscription renewal letter sent to vendors by the Subscription Renewal Letters (acq-23) service.</td>
</tr>
<tr>
<td>List of Expected Issues serial-expected-arrival.xsl</td>
<td>The report lists issues that are expected to arrive in a given time period (serial-17).</td>
</tr>
</tbody>
</table>

2 Column Headings (pc_tab_col.lng)

pc_tab_col.lng defines the columns of information that are displayed in list windows in the GUI clients.

In order to define column headings, edit the bibliographic library (USM01) table pc_tab_col.lng.

For more information about pc_tab_col.lng, see the ALEPH User Guide - General chapter - Desktop Customization - GUI and Toolbars section.

The following is a list of the Serials windows which use pc_tab_col.lng for formatting data, and their identifiers (Column 1 in pc_tab_col.lng).

<table>
<thead>
<tr>
<th>Unique Code</th>
<th>Serials GUI Panes</th>
</tr>
</thead>
<tbody>
<tr>
<td>PC_SERIAL_CLAIM_L_S</td>
<td>Claim List (under Subscription root)</td>
</tr>
<tr>
<td>PC_SERIAL_CLAIM_L</td>
<td>Claim List (under Check-in root)</td>
</tr>
<tr>
<td>PC_SERIAL_COPY_L</td>
<td>Subscription List</td>
</tr>
<tr>
<td>PC_SERIAL_HOL_LIST</td>
<td>Subscription Information Pane/HOL Links tab</td>
</tr>
<tr>
<td>PC_SERIAL_CHECKIN</td>
<td>Check-in List *</td>
</tr>
<tr>
<td>PC_SERIAL_GROUPS</td>
<td>Group List/All Items tab</td>
</tr>
<tr>
<td>PC_SERIAL_GROUPS_SL</td>
<td>Group List/ Sublibrary Groups/tab</td>
</tr>
<tr>
<td>PC_SERIAL_GROUPS_COL</td>
<td>Group List/Sublibrary/Collection Groups tab</td>
</tr>
<tr>
<td>PC_SERIAL_GROUPS_VEN</td>
<td>Group List/Vendor/Sublibrary tab</td>
</tr>
<tr>
<td>PC_SERIAL_GROUPS_ORD</td>
<td>Group List/Order Information tab</td>
</tr>
<tr>
<td>PC_SERIAL_CAPTIONS</td>
<td>Pattern List/Patterns tab</td>
</tr>
<tr>
<td>PC_SERIAL_PATTERNS</td>
<td>Pattern List/Level-X tab</td>
</tr>
<tr>
<td>PC_SERIAL_SCHEDULE</td>
<td>Pattern Information/Expected Schedule tab</td>
</tr>
</tbody>
</table>
### Unique Code

<table>
<thead>
<tr>
<th>Serials GUI Panes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule Root/Expected Schedule pane</td>
</tr>
<tr>
<td>PC_SERIAL_ARR_LOG</td>
</tr>
<tr>
<td>PC_COM_D_TRIG_LIST</td>
</tr>
<tr>
<td>PC_ITEM_ITEM</td>
</tr>
<tr>
<td>PC_SERIAL_ROUT_L</td>
</tr>
<tr>
<td>PC_SERIAL_ROUT_CL</td>
</tr>
<tr>
<td>PC_SERIAL_MEMBER_L</td>
</tr>
<tr>
<td>PC_ACQ_LOGGER</td>
</tr>
</tbody>
</table>

* In these GUI tables, an optional color/font can be used by the system for color/font differentiation between values in the same column. The alternative font and color can be defined in Columns 8 and 9 of `pc_tab_col.lng`.

### 3 Drop-down Menus

You can add or delete choices for some of the menus of the Subscription Information pane and on the Item Information pane by editing the following ADM library tables:

- `pc_tab_exp_field_extended.lng`
- `pc_tab_exp_field.lng`
- ALEPH ADM tables:
  - `tab40.lng`
  - `tab25.lng`
  - `tab15.lng`

**pc_tab_exp_field.lng**

The following list shows the `pc_tab_exp_field.lng` entries for drop-down menus which appear in various panes in the Serials function.

<table>
<thead>
<tr>
<th><code>pc_tab_exp_field.lng</code></th>
<th>GUI Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Serial Bar</td>
<td></td>
</tr>
<tr>
<td>SERIAL-SEARCH</td>
<td>Search for Serial Record by *</td>
</tr>
<tr>
<td>Control</td>
<td></td>
</tr>
<tr>
<td>SERIAL-GRP-SORT-TYPE</td>
<td>Sort Options for Group list</td>
</tr>
<tr>
<td>SERIAL-CHK-SORT-TYPE</td>
<td>Sort Options for Check-in list</td>
</tr>
<tr>
<td>pc_tab_exp_field.lng</td>
<td>GUI Fields</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>------------------------------------------------</td>
</tr>
<tr>
<td>SERIAL-PATTERN-CONT</td>
<td>Cont.</td>
</tr>
<tr>
<td>SERIAL-PTRN-REG-MODE</td>
<td>Regularity (first component)</td>
</tr>
<tr>
<td>SERIAL-PTRN-REG-TYPE</td>
<td>Regularity (second component)</td>
</tr>
<tr>
<td>SERIAL-CLM-SORT-TYPE</td>
<td>Sort Options</td>
</tr>
<tr>
<td>SERIAL-PATTERN-FREQ</td>
<td>Frequency</td>
</tr>
<tr>
<td>Subscription</td>
<td></td>
</tr>
<tr>
<td>SUBSCR-SORT-TYPE</td>
<td>Sort Options</td>
</tr>
<tr>
<td>BIND-DISCARD-TYPE</td>
<td>Discard/Binding</td>
</tr>
<tr>
<td>ITEM-LOCATION_TYPE</td>
<td>Call Number Type + 2nd Call Number Type</td>
</tr>
<tr>
<td>Claims</td>
<td></td>
</tr>
<tr>
<td>SERIAL-CLAIM-FORMAT</td>
<td>Format</td>
</tr>
<tr>
<td>SERIAL-CLM-SORT-TYPE</td>
<td>Sort Options</td>
</tr>
<tr>
<td>VENDOR-CLAIM-REPLY</td>
<td>Claim Reply</td>
</tr>
<tr>
<td>Routing Lists</td>
<td></td>
</tr>
<tr>
<td>ROUT-GROUP-STATUS</td>
<td>Group Status</td>
</tr>
<tr>
<td>Triggers</td>
<td></td>
</tr>
<tr>
<td>TRIGGER-DEPARTMENT</td>
<td>Department</td>
</tr>
<tr>
<td>Schedule</td>
<td></td>
</tr>
<tr>
<td>TIME-TYPE</td>
<td>New Volume Every</td>
</tr>
<tr>
<td></td>
<td>New Issue Every</td>
</tr>
</tbody>
</table>

* You can add Bibliographic search values. For example, you can add the BIB title by adding the following entry to the SERIAL-SEARCH section of the pc_tab_exp_field.lng table:

```
SERIAL-SEARCH    L-BIB Title    BIB-TIT
```

Note: TIT in this example must be an index code (defined in column 2 of tab00.lng) that is used by the system. You might also want to add other search values.

pc_tab_exp_field_extended.lng
The following list shows the pc_tab_exp_field_extended.lng entries for drop-down menus, which appear in the Subscription Information pane and in the Item Information form of the Serials function.
For entries marked by an asterisk (*), by selecting the following GUI fields, the windows mentioned below will appear. Clicking the arrows to the right of the fields in the windows mentioned below will display the menus.

See also the Call Number Options on page 10 and the Item Statistic Options on page 11 for setup options for the Call Number and the Statistics fields.

<table>
<thead>
<tr>
<th>pc_tab_exp_field_extended.lng</th>
<th>GUI Fields</th>
<th>Window</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subscription and Item</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ITEM-LOCATION</td>
<td>Call Number</td>
<td></td>
</tr>
<tr>
<td>ITEM-LOCATION-2</td>
<td>2nd Call Number</td>
<td>Build Call Number Field</td>
</tr>
<tr>
<td>* LOCATION-GR</td>
<td>Call Number + 2nd Call Number</td>
<td>Build Call Number Field</td>
</tr>
<tr>
<td>* LOCATION-USIG</td>
<td>Call Number + 2nd Call Number</td>
<td>Build Call Number Field</td>
</tr>
<tr>
<td>* LOCATION - PREFIX</td>
<td>Call Number + 2nd Call Number</td>
<td>852 Form</td>
</tr>
<tr>
<td>* LOCATION-SUFFIX</td>
<td>Call Number + 2nd Call Number</td>
<td>852 Form</td>
</tr>
<tr>
<td>* LOCATION-SOURCE</td>
<td>Call Number + 2nd Call Number</td>
<td>652 Form</td>
</tr>
<tr>
<td>Item</td>
<td></td>
<td></td>
</tr>
<tr>
<td>INVENTORY-NUMBER</td>
<td>Inventory Number</td>
<td></td>
</tr>
</tbody>
</table>

**ALEPHADM Tables**

- tab40.lng - This table is used to define the drop-down menu of Item Collection
- tab25.lng - This table is used to define the drop-down menu of Material Type
- tab15.lng - This table is used to define the drop-down menu of Item Status
- tab45.lng - This table is used to define the drop-down menu of Transaction Type

### 4 Item Arrival Form

You can determine whether or not the Item Arrival Form is displayed when the user checks issues in by any of the three check-in methods ("Fast", Publication Schedule, and Items window).

This can be set by the pc_server_defaults parameter: modify_item_arrival
For example: setenv modify_item_arrival Y

Value can be Y or N:
Y (default) – Item Arrival Form is displayed for each checked-in item.
N – Item arrival form is not displayed per item. The system registers the arrival of all grouped items (one-action check-in).

If modify_item_arrival is set to N (all items are checked-in in one action), an additional pc_server_defaults parameter is consulted: arrival_group_order.

This variable controls the order in which items are checked-in.

The arrival_group_order parameter is relevant for check in action made for Group: Vendor/sublibrary (tab 4 in Group node), Vendor Groups (tab 5 in Group node), and Order Information group (tab 6 in Group node). These three groups enable a partial arrival so that not all grouped items are necessarily arrived. The arrival_group_order parameter controls the order in which items are checked-in.

For example: setenv arrival_group_order 0

Value can be 0 or 1:
0 – (default) Items are checked-in by their sequence number (Z30-ITEM-SEQUENCE).

1 – Items are checked-in by item’s copy ID order (Z30-COPY-NUMBER). If part of the items is set with a null in the Copy Number field, the ones that have a value are prioritized. The items without the copy number are ordered by their sequence number (Z30-ITEM-SEQUENCE).

If modify_item_arrival is set to Y (each item is separately registered using a separated form), the system does not consult the arrival_group_order parameter.

If modify_item_arrival is set to N (all items are checked-in in one action), an additional pc_server_defaults parameter is consulted: display_check_in_note
This variable controls the display of the subscription's check-in note.

For example: display_check_in_note Y
Value can be Y or N:
Y – (default) The subscription's check-in note is displayed.
N - The subscription's check-in note is not displayed.

If modify_item_arrival is set to Y (each item is separately registered using a separated form), the system does not consult the display_check_in_note parameter.

5 Update of Serials Items Process Status

You can set the system to automatically change the issue item process status when various serial actions are performed. To do so, edit tab42 in the Administrative library. Make sure that Col. 1 is set with SERIALS.

The serials action (col.3 of tab42) can be:
  OP – Item opened
  NO – Item opened, when Z16 is not active
  CL – Item claimed
  UAR – Unarrive item
  AR – Item arrival registered
PI – Item arrival registered influence already arrived issues.
NP – Item not published (this is not a trigger,
it is a manually entered processing status.

For example:
When an issue is checked in, the item process status can be updated depending on the pre-defined setup of tab42.
In addition, you may set tab42 so that the check in issue that just arrived will invoke a change in the process status of the previous issue that arrived of the same subscription.

Setting a different process status for items which currently arrived or previously arrived enables the library to define a separated circulation policy for those items (tab15.<lng> and tab16 of the Administrative library).

To implement this sample, set AR (Item arrival registered) and PI (Previous Issue Registered) actions in col.3 of ./xxx50/tab/tab42.

---1---------2----3--4--5--
SERIAL   ##### AR NW
SERIAL   ##### PI NW

In this setup, when the check-in is performed, the system automatically performs the AR (Item arrival registered) and PI (Previous Issue Registered) actions.
The first line is read and the item process status of the current arrived item becomes NW (new item, or any other process status defined in Col.4).

If the second line is set (see above sample setup), then the item process status of the previously arrived item is updated to null (or any other process status defined in Col.4).
Col.5 is set to ensure that the process status is changed only if the current process status is NW (or any other process status defined in Col.5).
Use ## in Col.5 to indicate that the current item process status is irrelevant, and that the change is to be made on the previously arrived item in all cases.

Note: Col.5 only applicable when column 1.is ACQ or SERIAL with PI action in Col.3.

6 Call Number Options
Two forms in the Serials function include Call Number information fields: the Subscription Information Form and the Item Form. There are five options for entering data into the Call Number and Second Call Number fields in each of these forms, depending on the client setup:

- A drop-down menu with predefined call numbers from the pc_tab_exp_field_extended.lng table.
- No drop-down menu. Enter the call number directly into the field/s.
- Special form for libraries with Closed Stack management.
• An index with all previously used call numbers already entered. The Call Number Type must also be entered in this window.

• A special form for entering subfields directly into a MARC 21 Holdings 852 field (with the possibility of using the index call numbers as in type 4).

Which one of these options is available to you is defined in your client's alephcom/tab/alephcom.ini file, under the heading [ExpandField]:

; Describe the Expand button Status of special fields:
; 1 - Regular (pc_tab_exp_field_extended.lng) (default)
; 2 - Non Visible
; 3 - Special (for location=close stack)
; 4 - Special (for location=location index list)
; 5 - Special (for location=852 form)
; 6 - Special (for location=852 form, including special method for calculating Author Number and Chronology Number). Valid only for ItemLocation1Field and ItemLocation2Field.
; 7 - Special (for location=852 form, including special method for calculating Author Number). Valid only for ItemLocation1Field and ItemLocation2Field.

ItemLocation1Field=2
ItemLocation2Field=5
SerialLocation1Field=1
SerialLocation2Field=5

In this file, ItemLocation1Field and ItemLocation2Field refer to the Call Number and Second Call Number fields in the Item Form.

SerialLocation1Field and SerialLocation2Field refer to the Call Number and Second Call Number fields in the Subscription Information Form.

The digits to the right of each line refer to these five options.

7 Item Statistic Options

Two forms in the Serials function include Item Statistics information fields: the Subscription Information Form and the Item Form (in the General Information (2) tab). There are three options for entering data into the Item Statistic fields in each of the windows, depending on the client setup:

• No drop-down menu. Enter the data directly into the field.

• A drop-down menu with pre-defined options from the pc_tab_exp_field.lng table.

• A Special four-field form, with the drop-down menu for each field defined in pc_tab_exp_field.lng (ITEM-STATISTIC-1 to ITEM-STATISTIC-4).
Which one of these options will be available to you is defined in your client’s alephcom/tab/alephcom.ini file:

; 1 - Simple edit (default)
; 2 - Regular (pc_tab_exp_field)
; 3 - Special form (4 part statistic field)
;
ItemStatisticField=3
SerialItemStatisticField=3
ItemStatisticDelimiter=/

In this file, ItemStatisticField refers to the Statistic field in the Item Form.

SerialItemStatisticField refers to the Item Statistic field in the Subscription Information Form.

The digits to the right of each line refer to these three options.

8  Defining 853 Chronology and Numbering Terms

The codes used for months and seasons in the ALEPH 853 field are defined, per language, in table 853_chrono in the alephe/tab directory.

Table 853_numbering, in the same directory, defines the numbering terms (or ordinals) used, per language, by these fields.

8.1 853_Chrono

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>!1</td>
<td>!2</td>
<td>!3</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Column 1</th>
<th>Column 2</th>
<th>Column 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>eng M Nov.</td>
<td>M</td>
<td>eng M Nov.</td>
</tr>
<tr>
<td>eng S Spring</td>
<td>S</td>
<td>eng S Spring</td>
</tr>
<tr>
<td>eng S Summer</td>
<td>S</td>
<td>eng S Summer</td>
</tr>
<tr>
<td>eng S Autumn</td>
<td>S</td>
<td>eng S Autumn</td>
</tr>
<tr>
<td>eng S Winter</td>
<td>S</td>
<td>eng S Winter</td>
</tr>
<tr>
<td>fre M janv.</td>
<td>M</td>
<td>fre M janv.</td>
</tr>
</tbody>
</table>

**Column 1** defines the language. Depending on the language code entered in positions 35-37 of the 008 tag for the title, the relevant month/season name in that language will be picked up for the description field of each issue. Be sure that the language you add here has also been defined in ./alephe_tab/allowed_languages. If no language appears in tag 008, the default for English will be used instead.

**Column 2** defines the type of chronological term: M for month, S for season.

**Column 3** is the text you want the system to use for the month or season names. You can use up to 20 characters.
8.2 853_numbering

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td></td>
</tr>
</tbody>
</table>

!!!-!!!!!!!!--!!!!

eng 11    th
eng 12    th
eng 13    th
eng ?1    st
eng ?2    nd
eng ?3    rd

Column 1 defines the language. Depending on the language code entered in positions 36-38 of the 008 tag for the title, the relevant ordinal name in that language will be picked up for the description field of each issue. Be sure that the language you add here has also been defined in ./alephe_tab/allowed_languages. If no language appears in tag 008, the default for English will be used instead.

Column 2 states the number (or group of numbers) for which the ordinal is defined. Question marks may be used as wildcards. In the example, if the number is 13, the ordinal will be "th". However, if the number is 23, 33, 43 etc. (i.e., "?3"), the ordinal will be "rd".

Column 3 is the ordinal that will be used for the numbers defined in column 2.

9 Sorting of Issues and Items

The sorting of items in the Items list display is affected by the relevant lines in the tab_z30_sort table in the ADM library. The Sort Option available in this window is based on definitions in the table, as seen below. The name used for each of the options in the drop-down menu is defined in pc_tab_exp_field.lng (line SERIAL-SORT-TYPE). Note that if neither enumeration nor chronology levels are present in a Z30 item record, its sorting uses the default value present in z30-description.

```
tab_z30_sort
!  1  2  3  4  5
!!-!!!!!!!!!!-!!-!!-!!
SERIAL-0  A 03 D 00
SERIAL-1  A 01 D 01
SERIAL-2  A 00 D 03
SERIAL-3  A 02 D 04
SERIAL-4  A 06 D 06
SERIAL-5  A 08 D 06
SERIAL-6  A 04 D 01
```

Column 1 defines the sort option.

Column 2 defines the sorting order for Issue type items: A-Ascending or D-Descending.

Column 3 defines the sorting type for Issue type items. The following is a partial list of sorting types. For the full list, refer to the tab_z30_sort header.

!  00 - by numbering, ignores location, reverses enum b/c
if chronological-i(year) is spaces and
   enumeration-a(volume) is spaces then
   description+
   item-sequence.
if chronological-i(year) not spaces then
   chronological-i(year)+
   enumeration-a(volume)+
   enumeration-c(part)+
   enumeration-b(issue)+
   item-sequence

---------------------------------------------------------------------
01 - by numbering, ignores location
---------------------------------------------------------------------
if chronological-i(year) is spaces and
   enumeration-a(volume) is spaces then
   description+
   item-sequence.
if chronological-i(year) not spaces then
   chronological-i(year)+
   enumeration-a(volume)+
   enumeration-b(issue)+
   enumeration-c(part)+
   item-sequence

---------------------------------------------------------------------
02 - by location (using HOL records), then numbering
---------------------------------------------------------------------
if chronological-i(year) is spaces and
   enumeration-a(volume) is spaces then
   hol-doc-number+
   description+
   item-sequence.
if chronological-i(year) not spaces then
   hol-doc-number+
   chronological-i(year)+
   enumeration-a(volume)+
   enumeration-b(issue)+
   enumeration-c(part)+
   item-sequence

---------------------------------------------------------------------
03 - by location (using sublibrary), then sequence
---------------------------------------------------------------------
sub_library+
   item-sequence;
---------------------------------------------------------------------
04 - by location (using sublibrary), then numbering
---------------------------------------------------------------------
sub_library+
   if chronological-i(year) is spaces and
      enumeration-a(volume) is spaces then
      description+
      item-sequence.
   if chronological-i(year) not spaces then
      chronological-i(year)+
      enumeration-a(volume)+
      enumeration-b(issue)+
      enumeration-c(part)+
      item-sequence

---------------------------------------------------------------------
10 Routing List

When a routed item is checked in, the item is loaned to the Group Leader, and the system can perform circulation checks on this automatic loan. The checks are performed against the Group Leader to whom the loan is registered. Checks can be defined in the ROUT-LOAN section of tab_check_circ of the ADM library.

Note that the loan is performed whatever the result of the checks, but a new trigger record (Z104) is created for every inconsistency in the loan identified by the system.

11 Setting Up Binding Alert Reports

In order to generate the Binding Alert reports (bind-01 and bind-01), set up the following tables:
- tab_binding (under the ADM library)
- pc_tab_exp_field.eng (under the BIB library)
- sort tables (tabexpand_join, tabexpand, tabsort under the BIB library)
- bib_format (under the ADM library)

**tab_binding**
Specify sets of parameters for binding or discard rules for journal subscriptions (as shown below)

Each set is identified by a unique two-digit number. This identifier is entered in the Discard/Binding field of the subscription form.

```
+1 2 3 4 5 6 7 8
!-!-!-!-!-!-!-!-!-!-!-!-!-!-!-!-!-!-!-!-!-!01
 01 01 999 0003 0001 high standard BINDER01
 01 02 999 0003 0001 high standard BINDER02
 01 03 003 0003 0001 low high BINDER02
 04 01 999 0015 0001 high basic BINDER01
 05 01 002 0003 0001 secondary standard BINDER01
 06 01 002 0003 0001 secondary basic BINDER02
02 01 001 0003 0001 high basic BINDER01
03 01 001 0003 0001 high basic BINDER01
04 01 001 0003 0001 high basic BINDER01
05 01 001 0003 0001 high basic BINDER01
06 01 001 0003 0001 high basic BINDER01
07 01 001 0003 0001 high basic BINDER01
08 01 001 0003 0001 high basic BINDER01
09 01 001 0003 0001 high basic BINDER01
```

**pc_tab_exp_field.eng**
Define codes for sets of binding or discard rules in the BIND-DISCARD-TYPE menu as shown below.

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
</tr>
</thead>
<tbody>
<tr>
<td>BIND-DISCARD-TYPE</td>
<td>L Bind, using setup 1</td>
<td>01</td>
<td></td>
</tr>
<tr>
<td>BIND-DISCARD-TYPE</td>
<td>L Bind, using setup 2</td>
<td>02</td>
<td></td>
</tr>
<tr>
<td>BIND-DISCARD-TYPE</td>
<td>L Bind, using setup 3</td>
<td>03</td>
<td></td>
</tr>
<tr>
<td>BIND-DISCARD-TYPE</td>
<td>L Bind, using setup 4</td>
<td>04</td>
<td></td>
</tr>
<tr>
<td>BIND-DISCARD-TYPE</td>
<td>L Bind, using setup 5</td>
<td>05</td>
<td></td>
</tr>
<tr>
<td>BIND-DISCARD-TYPE</td>
<td>L Bind, using setup 6</td>
<td>06</td>
<td></td>
</tr>
<tr>
<td>BIND-DISCARD-TYPE</td>
<td>L Bind, using setup 7</td>
<td>07</td>
<td></td>
</tr>
<tr>
<td>BIND-DISCARD-TYPE</td>
<td>L Bind, using setup 8</td>
<td>08</td>
<td></td>
</tr>
<tr>
<td>BIND-DISCARD-TYPE</td>
<td>L Discard after one year</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td>BIND-DISCARD-TYPE</td>
<td>L Discard after two years</td>
<td>91</td>
<td></td>
</tr>
<tr>
<td>BIND-DISCARD-TYPE</td>
<td>L No bind, Discard after five years</td>
<td>92</td>
<td></td>
</tr>
</tbody>
</table>

**Sort Tables**
The report files which are generated by the Bind Alert Report (bind-01) and Serial Binding Slip (bind-02) services can be sorted by the Author +Title sort method, which results from a combined field. The tabexpand_join table is used to create a virtual field. This virtual field is used in tabsort to create a new Z101 sort key. For example

```
tabexpand_join:
BND 1#### -e46 a 245## a t
```

```
tabexpand:
SORT-DOC expand_doc_join_permute
```

```
tabsort:
```
bib_format
The serial-bind-slip entry controls the content of the bibliographic citation in the report that is created by the service Serial Binding Slip (bind-02). For example:

```
serial-bind-slip 014
```

11.1 The Binding Alert Process
In the Discard/Binding field of the subscription form in the Acquisitions/Sericals GUI, the staff user selects a coded value from the drop-down menu. This code defines the set of binding or discard rules that will be applied to the subscription.

From the Services menu, Binding submenu, the staff user runs the bind-01 and bind-02 services.

For each subscription that passes through the sublibrary and collection filters, the coded value in the Discard/Binding field is retrieved.

The system determines whether the Discard/Binding rule in the subscription record matches the service's parameters, by using `tab_binding`. The values in columns 6,7,8 of the equivalent rule (as in the Discard/Binding rule in the subscription record) are compared to the parameters submitted in the service. If a match is found, the issues linked to the subscription are analyzed for readiness for binding by checking the data in columns 3,4,5 of `tab_binding`.

12 Client Setup (acq.ini)
The following are sections in the acq.ini file which are unique to the Serials function:

[General]

```
SerialFilterLogger=
The SerialFilterLogger defines the Subscription Log filter parameters. According to the parameter selected, the system saves the number of transactions by which the Subscription Log was recently filtered. When the parameter has no value specified, "All" becomes the default value in the filter list.

FilterCheckinSublibs=
The FilterCheckinSublibs flag is used to define whether the sublibraries checked in the Control List pane will be saved and loaded.

SerialEnableSchedule=
The SerialEnableSchedule flag is used to define whether the Schedule node does or does not appear in the Serials Tree.

SerialEnablePattern=
The SerialEnablePattern flag is used to define whether or not the Patterns node appears in the Serials Tree.

SerialEnableRouting=
```

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The SerialEnableRouting flag is used to define whether or not the Routing Lists root and the Routing Lists node under Subscription root in the Navigation Tree of the Serials Tab will be displayed.

[SerialBar]
The [SerialBar] section has the following parameter:

IndexCode=
Saves and loads last selection in the Serials Bar drop-down menu. For example:
IndexCode = ADM Sys No

[SerialTree]
The [SerialTree] section has the following parameters:

BkColor=255,255,255
Sets the Background color of the Serial Tree
2=277
4=231
5=350
14=225
12=213
6=266
3=283
20=460
The above lines refer to the positioning of the splitters between the panes.

Note: There is no need to change these settings.

[ItemList]
The [ItemList] section defines the default sort for the Items List displayed in the Items tab. The options are set in the pc_tab_exp_field.lng table. The options themselves are set in tab_z30_sort in the ADM library.

This section has two parameters:

ItemSortType=
This setting is used for non-issue items; i.e., items whose material type does not begin with "ISS".

SerialSortType=
This setting is used for issue items; i.e., items whose material type begins with "ISS". The setting has to match one of the options defined in the ITEM-SORT-TYPE section of the ADM library's pc_tab_exp_field.lng table which in turn is based on definitions in the tab_z30_sort table.

[CheckInListExpand]
The [CheckInListExpand] section has the following parameter:

ArriveAutoPrintLabel=
The ArriveAutoPrintLabel flag is used to define whether or not a label will be printed while an issue is checked in by selecting the Arrive button on the Check-in List display.
The subscription record contains a flag which indicates whether or not to print a label at check-in time. If the [ArriveAutoPrintLabel] parameter is set to "Y", a message pops up when the issue checked in is linked to a subscription that has the label print unchecked. If the checked in issue is linked to a subscription that has the label print checked, and the parameter is set to "N", no label will be printed during the check-in process.

[SubscrList]
The [SubscrList] section has the following parameter:

SubscrSortType=
Defines the default sort type in the Sort Options field of the Subscription List pane and subscription list displayed in Acquisitions- Subscription List of serial order. It refers to the SUBSCR-SORT-TYPE section of table pc_tab_exp_field.lng of the ADM library. The available sorting options are: STANDARD, SUBLIB, VENDOR.

[GroupList]
The [GroupList] section has the following parameter:

ArrivePrintLabel=
The ArrivePrintLabel flag is used to define whether or not a label will be printed while an issue is checked in by selecting the Arrive button on the Group List display. The subscription record contains a flag which indicates whether or not to print a label at check-in time. If the [ArrivePrintLabel] parameter is set to "Y", a message pops up when the checked in issue is linked to a subscription that has the label print unchecked. If the checked in issue is linked to a subscription that has the label print checked, and the parameter is set to "N", no label will be printed during the check-in process.

[SerialClaimList]
The [SerialClaimList] section has the following parameter:

ClaimSortType=
Defines the default sort type in the Sort Options field of the Claim List pane. It refers to the SERIAL-CLM-SORT-TYPE section of the table pc_tab_exp_field.lng of the ADM library. The available sorting options are: CLAIM-A, CLAIM-B, REPLY-A, REPLY-B.

[Messages]
DisplayRequestedMessage=Y
This section determines whether the staff user will be warned when a change is made in the status of a serial item if the item is requested. The warning will be issued when registering an item’s (or group’s) arrival, un-arrival, or when sending a claim letter for an item. Note that this variable affects also changes that are made on a non-serial order. Refer to the Orders System Librarian Guide for more information.

13 Serials Tables
ALEPH TABLES
1. **853_chrono**
   List of full (or partial) names of months and seasons, arranged by language, to be used when creating Publication Schedules by the 853/853X method.

2. **853_numbering**
   List of ordinals (for example, 1st, 3rd), arranged by language, to be used when creating Publication Schedules by the 853/853X method.

**LIBRARY TABLES**

1. **tab_85x_import**
   This table relates to the import of serials prediction fields (853, 853X, etc.) from other libraries into your own library. It defines the way in which fields imported from another library (using the b-serial-52 service) for checking against your serials records, will be used for matching.

   It is possible to define which index should be used for the match; whether the entire field from the input file or a specific subfield should be used for the match; and which subfield in that field in your own database should be used.

2. **tab_z30_sort**
   Sort options for the Items window in the Acquisitions/Serials GUI client. Use in conjunction with `pc_tab_exp_field.lng` (line SERIAL-SORT-TYPE).

3. **tab100**
   The variable UPDATE-Z30-COPY determines whether or not the Z16-copy-sequence is copied to the Z30-copy whenever an item is created for an issue.

   The variable UPD-SUBS-FROM-ORDER determines whether or not updating of serial information within the order record will affect the equivalent fields in the order's related subscription record. The relevant fields are: Vendor Code, Vendor Reference, Delivery Type, Subscription Start, and Subscription End Dates

   Values can be: Y or N.

   Y- Update of a serials order affects its subscription record (new enhancement).

   N- Default value - Update of a serials order does not affect the subscription.

4. **tab42**
   This table defines changes in the Item Process Status of issue-type items, as a result of events in the serial control process (for example, opening expected issues, claiming and check-in).

5. **tab45**
This table defines whether or not a transaction creates an order log record, and if the transaction is system-generated or can be entered manually.

6. tab40
   This table defines the expansions of the Collection Code 02 entered in the Collection field in the expanded form to be displayed in the Web OPAC.

7. tab25
   This table defines the possible values for Z30-Material (Item Material Type).

8. tab15
   This table defines Item Statuses and various parameters connected to these statuses.

9. tab_binding
   This table specifies sets of parameters for binding or discard rules for journal subscriptions. Each set is identified by a unique two-digit number. This identifier is entered in the Discard/Binding field of the subscription form.

10. user_func.lng
    This table includes serials functions which support authorization control.

11. tab_checksum
    tab_checksum is used to define the checksum programs. The programs can be used for creation, validation and correction of items barcodes.

    Note: For issue items generated by the Prediction Pattern process, you can use the following entry for the creation of the ISSUE-ITEM barcode.

    For example:
    ```
    ! 1
    !!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!>
    CSCR-Z30-BARCODE-ISS       checksum_create_z30_by_doc_no
    ```

12. tab_hld_stmt
    This table is consulted when the procedures: expand_doc_hld_stmt or fix_doc_hld_stmt are invoked for generating summary holdings statements. Items with processing status NP (not published) or NA (not arrived) are not included in the summary statement.

    This table is used to map items with a process status different from NA or NP which are to be excluded from the summary holdings statement. This is done by mapping them as if they have a processing status of NP or NA.

    This mapping can be done for items that have a particular sublibrary and/or collection, item status, item process status, and/or break indicator.
For example: If a library wants to map the code of the process status MI (missing) as NA, the table will include the following line:

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>!</td>
<td>!</td>
<td>!</td>
<td>!</td>
<td>-</td>
<td>!</td>
</tr>
<tr>
<td>#</td>
<td>#</td>
<td>#</td>
<td>#</td>
<td>#</td>
<td>#</td>
</tr>
</tbody>
</table>

ALEPHE TABLES

1. **tab_sublibrary**

*tab_sublibrary* is used to define the list of sublibraries that are displayed in the Control Setup tab in the Control pane. Only sublibraries defined as type 1 and type 4 in column 2 are displayed.