



Link to items from claims task list

Yoel Kortick
Senior Librarian





- Introduction
- Example for Physical One Time POL
- Example for Physical Continuous POL



Introduction

Introduction

- The July 2019 release includes a new section in the Claims Task List for each claim: "Claiming Information".
- This section, which is available for physical PO lines, lists the items or holdings and their claim status.
- This new feature therefore allows institutions to not only see which POLs have claims, but also gain valuable insight into the inventory which is being claimed.

Introduction

- For physical one time orders, the list displays all unreceived items linked to this PO Line.
- The Go To Inventory link displays the item editor.
- For physical continuous orders, the list displays all unreceived items that are under the holdings linking to this PO line, based on the prediction pattern.
- In this case, if there are items, the Go To Inventory link goes to the item editor.
- If there are no items then the Go To Inventory link goes to the holdings item lists.




Example for Physical One Time POL

Example for Physical One Time POL

- Here we can see that title "Gender, manumission, and the Roman freedwoman" has one item ordered and 0 items have arrived.
- The item was supposed to arrive on March 13, 2018 but has not arrived.

Example for Physical One Time POL

3  **Gender, manumission, and the Roman freedwoman / Matthew J. Perry., Cambridge :, Cambridge University Press,, 2016, 9781107697638, ISBN** Edit Change Expected Date ...

MMS ID: 997108107502671 **Copies:** Library - Davison General Three Week (1) **Receiving note:** Hold for Katherine Hyatt - 100792229

Assigned to: - **Total price:** 19.99 GBP **Sent date:** 06/02/2018

Type: Physical - One Time **Funds:** Classics books current 6600-010377-10 (100.0%) (FY-2019) **Open claims exist for this PO line, 0 Items were received out of 1 ordered,, Overdue PO line**

PO line owner: Library **Vendor/Account:** Dawson UK Ltd / (M) 88430 **Reference ID:** DP Feb 05, **Expected delivery:** 13/03/2018


(Sent)

Physical One Time (1)

Library	Location	Call Number	Barcode	Availability	Received Date
Library	Davison General Three Week	-	T57145	● Not Received	-

Note: A yellow box highlights the text "This is what formerly displayed (just one tab called 'Physical One Time')". A red arrow points from this box to the "Physical One Time (1)" tab in the table above.

Example for Physical One Time POL

3  **Gender, manumission, and the Roman freedwoman / Matthew J. Perry., Cambridge :, Cambridge University Press,, 2016, 9781107697638, ISBN** Edit Change Expected Date ...

MMS ID: 997108107502671 **Copies:** Library - Davison General Three Week (1) **Receiving note:** Hold for Katherine Hyatt - 100792229

Assigned to: - **Total price:** 19.99 GBP **Sent date:** 06/02/2018

Type: Physical - One Time **Funds:** Classics books current 6600-010377-40 (100.0%) (FY-2020) **Vendor/Account:** Dawson UK Ltd / Account (M) 88430 **Open PO line received Overd**

Vendor reference ID: DP Feb 05, 2018 **Expected delivery:** 13/03/2018

Now we have a **NEW "One Time Claiming Information" tab**

It includes a **NEW link to go directly to the inventory**

Physical One Time (1)		One Time Claiming Information (1)			
Library	Location	Call Number	Barcode	Expected Receiving Date	
Library	Davison General Three Week	-	T57145	13/03/2018	Go to Inventory

Example for Physical One Time POL

Physical Item Editor

Relink to another bibliographic record Cancel Save

Process type Acquisition **Status** Item not in place Browse shelf li...

General ENUM/CHRON Notes History

General Information

Barcode	<input type="text" value="T57145"/>	Generate	Copy ID	<input type="text"/>
Material type	<input type="text" value="Book"/>		Item policy	<input type="text" value="Three"/>
Provenance	<input type="text"/>		Is magnetic	<input type="text"/>
PO Line	<input type="text" value="POL-24406"/>	<input type="button" value="X"/> <input type="button" value="☰"/> <input type="button" value="📄"/>	Issue date	<input type="text"/>
Receiving date	<input type="text"/>	<input type="button" value="📅"/>	Expected receiving date	<input type="text" value="13/03/2018"/>
Enumeration A	<input type="text"/>		Enumeration B	<input type="text"/>

After clicking link to "go to inventory" the unreceived item opens in the physical item editor




Example for Physical Continuous POL

Example for Physical Continuous POL

- Here we can see that title "Egyptian archaeology : the bulletin of the Egypt Exploration Society" has 27 of 31 items received.

Example for Physical Continuous POL

17  **Egyptian archaeology : the bulletin of the Egypt Exploration Society., The Society, 1991-., 0962-2837, ISSN** Edit Change Expected Date ...

MMS ID: 990001593250402671 **Copies:** Library - Davison Journals (1) **Renewal date:** 31/12/2016

Type: Physical - Subscription **Total price:** 101.30 GBP **Receiving note:** -

PO line owner: Library **Funds:** Main subscriptions (100.0%) (FY-2019) **Sent date:** 16/10/2014

Account: LM Information Default Account ZLM **Reference ID:** 685439-00052

PO line: 96806-6610010377-10 / (Waiting for Renewal) **Expected delivery:** -

No item was received in more than 0 days., Items already exist in the repository, Overdue PO line, At least one of the reporting codes is missing

This is what formerly displayed (just one tab called "Physical Continuous")

Physical Continuous (1)				
Library	Location	Call Number	Summary	Items Received
Library	Davison Journals	-	Vol. 1, 1991-	27 of 31

Example for Physical Continuous POL

14  **Egyptian archaeology : the bulletin of the Egypt Exploration Society., The Society, 1991-., 0962-2837, ISSN** Edit Change Expected Date ...

MMS ID: 990001593250402671 **Copies:** Library - Davison Journals (1) **Renewal date:** 31/12/2016

Type: Physical - Subscription **Total price:** 107.07 GBP **Receiving note:** -

Funds: Main subscriptions (100.0%) (FY-2020) **Sent date:** 16/10/2014

Vendor/Account: LM Information Delivery / Default Account ZLM **Expected delivery:** -

Vendor reference ID: 685439-00052

No item more already repos line, A report missing

98806-6610010377-10 / (Waiting for Renewal)

Now we have a **NEW** "Continuous Claiming Information" tab

It includes a **NEW** link to go directly to the inventory

Physical Continuous (1)		Continuous Claiming Information (4)			
Library	Location	Call Number	Item Description	Expected Receiving Date	
Library	Davison Journals	-	Vol. 53 (2018)	22/08/2018	Go to Inventory
Library	Davison Journals	-	Vol. 52 (2018)	22/02/2018	Go to Inventory
Library	Davison Journals	-	Vol. 55 (2019)	22/08/2019	Go to Inventory
Library	Davison Journals	-	Vol. 54 (2019)	22/02/2019	Go to Inventory

Example for Physical One Time POL

Physical Item Editor

Relink to another bibliographic record Cancel Save

Process type Acquisition **Status** Item not in place Browse shelf li...

General ENUM/CHRON Notes History

General Information

Barcode	<input type="text" value="T57661"/>	Generate	Copy ID	<input type="text"/>
Material type	<input type="text" value="Issue"/>		Item policy	<input type="text" value="Journal"/>
Provenance	<input type="text"/>		Is magnetic	<input type="text"/>
Holdings PO Line	96806-6610010377-10		Issue date	<input type="text" value="22/08/2018"/>
Receiving date	<input type="text"/>		Expected receiving date	<input type="text" value="22/08/2018"/>
Enumeration A	<input type="text" value="53"/>		Enumeration B	<input type="text"/>

After clicking link to "go to inventory" the unreceived item opens in the physical item editor



THANK YOU!

