ALEPH/McGill
Acquisitions Ordering Module II

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1. Training schedule and online calendar

The training schedule is available on the Web as an electronic calendar.

1. Go to the library homepage at http://www.library.mcgill.ca/
   Click on Electronic Classroom (left hand column)

2. Go to the bottom of the page.
   Click on Select beside the word “Calendars” at the bottom right of the
   page.

3. Click on alephtrn

4. To find out which workshops you are registered for:
   Go to the bottom of the page
   Click on Search beside the words “Calendars select” at the bottom right of
   the page.

5. Enter your PC network login in the search box that pops up.
   Only change the dates if you do not want to see al your scheduled
   sessions.
   Click on the Search button

6. A list of all the occurrences of your registration will appear in a new browser
   window.

7. To change your schedule to a calendar-like, or grid, view:
   Go to the bottom of the page
   Click on block

8. To print your calendar schedule:
   Go to File…Print Preview from the browser main menu to verify that your
   printout will look the way you want it to, then select Print.
   Go to File…Print, to print without previewing.
2. Introduction

Welcome to Acquisitions Ordering Module 2.

Trainers: Louise Nadeau, Joan Hobbins
Helpers: Joanna Andrews, Anne-Marie Emili, Zafiro Bouwman

Like module I, the session will consist of about 1 hour of training, a 10 minute break and the remaining time will be used for hands on exercises.

In Module I, you got a brief overview of pre-order searching in the OPAC module, you were shown how to create a simple monograph order and you learned about vendors, budgets and currencies.

In today’s session, I will show you how to search more efficiently in the OPAC module to prevent duplication.

When we first go live, all we will have in Aleph will be converted orders. As we start to work in Aleph, we will create new orders. I will mention some differences between a converted order and a new order.

The order log is an important feature of Aleph. For all converted orders, the order log shows the various notes migrated from the NOTIS DORD. For new orders, the order log shows all actions related to the order. I will compare the order log for both types of orders.

Joan will then talk about Standing Orders and show you how to create a simple Standing Order. Then she will talk about item records in Aleph.
3. Pre-order searching in the OPAC

One of the main differences between NOTIS and Aleph is the way the indexes work.

**NOTIS:**
One place to enter search query for all entries: ISBN, ISSN, titles, authors, series.

**Aleph:**
Various options and within some of them, various headings lists or indexes for different entries:

- **Direct** Search option for ISBN (and ISSN for serials)
- **Browse** Search option: Titles headings list for titles, added titles and series.
- **Browse** Search option: Authors/Names for all authors and added authors.
- **Browse** Search option: Series for series (only series will show here)
- **Find** Search option: keyword searching anywhere in the record or in specific fields

**Efficient pre-order searching:**

In pre-order searching, we must check at least two entries, preferably the ISBN and title or if no ISBN is available, the title and author.

We will use the OPAC Search options in the following order.

1. **Direct search:**

We will use the Direct search option to look for the ISBN number if available and make sure we check the ‘Exact key’ box to get an exact match.

If the ISBN is in the database, the full record will be displayed and we will have access to the Nav. Map to determine if it is really a duplicate. If we have a duplicate, we will have to go no further.

If the **ISBN is not in the database**, we will get no result and will go to the second option.
2. Browse search:

We will use the **Browse** search option to look for the title and possibly the series or author. The title and series will be found in the ‘Titles headings list’ and the author(s) will be found in the ‘Authors/Names headings list’.

We will not search for the author if we already searched for the ISBN and the title as these two entries should be sufficient most of the time to determine if we have a duplicate.

If our search produces no result, we will assume that the material is not in the McGill database and we will then search the utilities (Laser Quest, OCLC) to verify the information on the requisition and to download a record if found.

However, if we find that the information we had was incorrect, we must search the database again to check for duplication before downloading a record.

3. Find search:

We will not use the **Find** option very often as this a keyword search and can produce large lists of sets. It should be used for specific problems only.

**First option : Direct Search:**

The only option to search for ISBN or ISSN numbers in Aleph.

When an ISBN or ISSN number is available, we will always start with the Direct Search.

This will be the quickest and most direct way to find duplicates.

**Make sure the ‘Exact key’ box is checked** or the system will display the closest number to the one you typed in the search request field. This can be misleading.
Second option: Browse Search:

The Browse Search lets you select various headings lists.

The text you enter in the ‘Enter starting text’ field can be truncated.

It is not case sensitive so you can type all in lower case if you wish.

The result of your search will show in an alphabetical list.

Titles headings:

The result of a Titles Heading search will show titles, added titles and series.

Series headings:

The result of a Series Heading search will show series only.
‘Starting Text’ truncation:

The Browse Search option lets you search the database in a way that is similar to searching in NOTIS as you can enter the Starting Text and the last word can be truncated.

This will be useful to search titles or series with variant spelling such as color and colour if it is the last word you enter in the Starting Text field.
Jump:

The Jump option will be very useful in pre-order searching.

You access the Jump window by clicking on the ‘Jump’ button or by using the shortcut keys Alt + j.

The Jump option allows you to jump to another part of the same Headings List. Remember that you cannot jump to a different Headings List.

To go from a title search to an author search, you must go back to the Browse Query window, highlight the Authors/Names Headings list and enter the author’s name in the Starting Text field. You could click on the Icon again or use the shortcut keys Alt + s + r.

You do not have to close the first browse list to open a new Browse Query window. Simply click on the icon or the shortcut keys to open a new search window. After you enter text in the new window and ‘enter’ or click ‘OK’, a new browse list will open.

The Jump option will be very useful to search for a title entry then jump to a series entry. It will also allow us to jump from title to title without having to go back to the Browse Query every time.
**Scenario using the ‘Jump’ option:**

You are searching for the title ‘Botany in the United States’ published by A. R. Liss and it is no.8 in the series ‘Plant biology’.

The title search brings an alphabetical list showing the title in second position.

As the list shows the title only and there is only one entry, you look at the ‘**Full**’ display to see whether this is the book the bibliographer wants to order.
This is the wrong publisher and there is no series. This was the only hit for this title and your ISBN search had produced no hit either. You want to make sure the series is not a Standing Order so you click on the ‘X’ to cancel the full display and get back to the hit list. You click on the ‘Jump’ button and the ‘Jump to…’ window displays. You type the series entry (or you can truncate the word biology):

![Jump to... window]

A new Browse List of Titles is displayed showing the series entry in second position.

![Browse List of Titles]

This is the wrong publisher and there is no series. This was the only hit for this title and your ISBN search had produced no hit either. You want to make sure the series is not a Standing Order so you click on the ‘X’ to cancel the full display and get back to the hit list. You click on the ‘Jump’ button and the ‘Jump to…’ window displays. You type the series entry (or you can truncate the word biology):

![Jump to... window]

A new Browse List of Titles is displayed showing the series entry in second position.

![Browse List of Titles]
As you have only one entry for this series, you look at the ‘Full’ bibliographic record to see if it is a standing order. When we work with the full database, we would probably get many hits and look at the brief view, going to the full view only if necessary. In this case, we only have another title in the series.

**Third option : Find Query:**

The Find option is a keyword search so you must enter full words or use wildcards. Searches using wildcards will usually produce large Lists of Sets.

Checking the box ‘Words adjacent’ will ensure the words are adjacent but not necessarily in the same order as your find query.
You can use boolean commands here to combine titles and authors or other fields.

The search query produces a List of Sets showing the number of records found if any. You can view brief records or full records from this window.

You can also ‘refine’ a List of Sets with a ‘Find’ search in another field such as publisher or place of publication. This kind of search would only be used as a last resort with difficult material.

4. Converted orders and new orders

When we go live in May, all order records in Aleph will be converted records. Our test records will have disappeared and we will not have created any new records yet.

The NOTIS number for a converted record will always be visible in the bibliographic record on the Nav. Map.

a) Converted record showing the Nav. Map and the Order List:
The three tabs of the Order Form for a converted order:
b) New order placed on a converted bibliographic record:
In this case, as the new order was placed on a converted record, the NOTIS number shows in the bibliographic record on the Nav. Map.

When a new order will be created on a new bibliographic record, there will obviously be no NOTIS number in the bibliographic record on the Nav. Map.

The three tabs of the Order Form for a New Order:
The Order Form for converted orders and new orders will look alike. What will be very different is the order log for each.

5. Order Log

Converted orders will show the various notes from the DORD in the Order Log. They will include the notes found at the bottom of the DORD screen such as Payment, Claim, Dealer report and Receipt notes. These show already in the training file.

The rest of the notes found everywhere else in the DORD will also show in the order log. Each note will have a prefix showing where in the DORD it came from. The limited space in NOTIS forced us to put notes in fields not designed for them. These notes are not showing in the order logs yet in the training file.

New orders will show the notes we put in the appropriate fields on the Order Form, the notes we add to the order logs ourselves as well as the log of all actions related to the orders.

The following two examples show the difference between the order logs for a converted order and a new order.
Note that the **Title Bar** of an order log shows the **order number**.

**Order log - converted order**

![Order log screenshot](image.png)

Note that the **date** shows but **not the time** as there is no equivalent in NOTIS.

The **Description** and **Details** clearly show what the note was. Those of you who are familiar with the notes at the bottom of a NOTIS DORD will recognize the abbreviations and text if the details.

The other notes from the various NOTIS DORD fields will be showing here also with prefixes so we can identify where they came from. This is not showing here yet.

The **User** column will always show **CONV** for a converted record.
Order log - New order

<table>
<thead>
<tr>
<th>Date &amp; time</th>
<th>Description</th>
<th>Details</th>
<th>User</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>04 Feb 2000</td>
<td>Item process status</td>
<td>Item process status set as OP.</td>
<td>NADEAU</td>
<td></td>
</tr>
<tr>
<td>02:53 PM</td>
<td>Next claim</td>
<td>Order next claim date set as 04 May 2000</td>
<td>NADEAU</td>
<td></td>
</tr>
<tr>
<td>04 Feb 2000</td>
<td>Order status</td>
<td>Order status set as SV.</td>
<td>NADEAU</td>
<td></td>
</tr>
<tr>
<td>02:53 PM</td>
<td>Item(s) created</td>
<td>1 items created. Material type set as BOOK, Item status set as 01.</td>
<td>NADEAU</td>
<td></td>
</tr>
<tr>
<td>04 Feb 2000</td>
<td>Budget</td>
<td>Encumbrance for budget ANDREW/S-1959 altered to</td>
<td>NADEAU</td>
<td></td>
</tr>
<tr>
<td>02:53 PM</td>
<td>Estimated price</td>
<td>Estimated price set as 24.00 (USD). Local amount set as 35.04.</td>
<td>NADEAU</td>
<td></td>
</tr>
<tr>
<td>04 Feb 2000</td>
<td>Order status</td>
<td>Order status set as NEW.</td>
<td>NADEAU</td>
<td></td>
</tr>
<tr>
<td>02:53 PM</td>
<td>Order created</td>
<td>Order created.</td>
<td>NADEAU</td>
<td></td>
</tr>
</tbody>
</table>

Note that the **date and time** are showing for this new order.

The **Description** column lists the fields affected by each action showing in the **Details** for this order.

The **User** shows the **Login Name** of the person who created or updated the order, in this case I did it.

There is no **Action date** in this case but there is a claim date on the Order Form.
6. STANDING ORDERS

Using the Mini OPAC in the Acquisitions Module

To save having to access the OPAC module in order to find a bibliographic record, a mini OPAC is available within the Acquisitions module that enables you to search the catalog directly. This will be used after pre-ordering searching and after you have either GTO’d a record from one of the utilities we use or have created a provisional record.

You can activate the mini OPAC in one of three ways by:

- clicking on the ‘Orders / Find record’ menu option:

- using **Alt + r then f**

- by clicking on the ![ toolbar icon.](image)

All three ways give you the same form. The screenshot below shows the mini OPAC search form:
7. Creating a simple standing order

The same five basic steps for creating a monograph order also applies to a standing order:

1. Getting the bibliographic record into the Acquisitions Module
2. Adding an order to the Order List
3. Filling out the order form
4. Saving the order
5. Sending the order to the vendor

Step 1. Getting the bibliographic record

To place an order on a title, we first require a bibliographic record in the database. GTOing will be discussed in later sessions. For the purpose of today’s training, we have already downloaded a record from Laser Quest, OCLC or A-G Canada.

Step 2. Adding an order to the Order List

As previously seen, whenever a bibliographic record is brought up in the Acquisitions module, the Navigation Window appears which is identical to the one seen in the OPAC. The **Order List** for the same record will also be displayed in front of the ‘Nav. Map’ window.
If there have been previous orders on this record, they will show as separate lines on the order list. Otherwise, the Order List screen will be blank. It is extremely rare to have two concurrent orders for a standing order. However we may have previous orders on a standing order for a number of reasons.

**Step 3. Creating the order**

For our standing order today we will be placing an order on a blank order list. To create an order, click on the ‘Add’ button or use **Alt + a**.

The ‘Order type’ form will appear and you will have three choices: Monograph, Serial or Standing order. The default here is monograph. You must select standing order and <enter> or click on OK.

![Order Type Form](image)

**Step 4. Filling out the Order Form**

Some fields are automatically assigned by the system and some are mandatory. All fields need to be checked even when the system fills them in with defaults. You may override the defaults in any field that is white. If the field is gray, you cannot type in that field to add new information or change existing information.

For a standing order you will fill in a form that is very similar to the monograph form and includes the following boxes.

- **Order Information tab:** Material type
  - Sub-library
  - Acquisition method

- **Vendor tab:**
  - Vendor code + <enter>
  - Maximum arrival days

- **Quantity and Price tab:**
  - Number of units as 1 only
  - Encumber budget
List of the various fields in the three windows of the Order Form

A. **Order Information** tab Fill in fields as follows:

- **Order number 1**
  - Automatically assigned by the system

- **Order number 2 & 3**
  - We will determine if & how these will be used.

- **Order status**
  - This defaults to NEW. Clicking on the arrow will show the other options. The system updates the order status automatically when necessary.

- **Order ISBN**
  - If there is an ISBN in the bibliographic record, the system will display the first one here. You can override it.

- **Order group**
  - To be used for reports
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Open date</strong></td>
<td>Date the order was initiated. It is inserted automatically by the system and cannot be overwritten.</td>
</tr>
<tr>
<td><strong>Order date</strong></td>
<td>Date the order is sent to the vendor. It is inserted automatically by the system and cannot be overwritten.</td>
</tr>
<tr>
<td><strong>Status date</strong></td>
<td>Date the order status was last changed. It is inserted automatically by the system and cannot be overwritten.</td>
</tr>
<tr>
<td><strong>Update date</strong></td>
<td>This is the date any change was last made on the order. If inserted automatically by the system.</td>
</tr>
<tr>
<td><strong>Invoice status “Complete”</strong></td>
<td>The system will automatically fill in this field when you check the order complete in the General Invoice &amp; line item invoice process.</td>
</tr>
<tr>
<td><strong>Arrival status “Complete”</strong></td>
<td>The system will automatically fill in this field when you check the complete arrival in the arrival process.</td>
</tr>
<tr>
<td><strong>Material type</strong></td>
<td>This can be used for reporting purposes.</td>
</tr>
<tr>
<td><strong>Sub-library</strong></td>
<td>Mandatory. Select the sub-library to which the order belongs.</td>
</tr>
<tr>
<td><strong>Acquisition method</strong></td>
<td>Mandatory. Click on arrow for options. “P” for purchase will be the most commonly used.</td>
</tr>
<tr>
<td><strong>User ID</strong></td>
<td>May be used by Serials to send directly to branch libraries.</td>
</tr>
<tr>
<td><strong>Send directly</strong></td>
<td>May be used by Serials.</td>
</tr>
<tr>
<td><strong>User name</strong></td>
<td>Automatically filled in if User Id is used.</td>
</tr>
<tr>
<td><strong>Library note</strong></td>
<td>An optional note of up to 100 characters</td>
</tr>
</tbody>
</table>
B. **Vendor tab**

- **Vendor code**
  Mandatory. You may select a vendor from a list by clicking on the arrow button or you may type it into the field. If you choose to type it in, ensure that you press the enter key, with the cursor inside the Vendor code field, when you are finished typing. This will enable the default information to be inserted on the Order form.

- **Vendor name**
  The system will automatically fill in the vendor name.

- **Vendor reference**
  It is used for a reference number which may be supplied by a vendor.

- **Vendor note**
  100 characters to use as necessary.

- **Order delivery type**
  By default, the system will automatically fill in the delivery type that’s on the vendor record, but this can be overwritten. The options are **LI** (List) which enables all of the orders for a
single vendor to be collated and dispatched together as a single communication, LE (Letter) which produces a single communication for each order or EDI for electronic orders.

**Letter type**
If LE delivery type is selected. It will default to the letter format recorded in the vendor record but can be overwritten.

**Send letter by**
If LE delivery type is selected. It will default to the letter format recorded in the vendor record but can be overwritten. Up to 99 different formats for each language can be defined by the library.

**Delivery type**
By default this is taken from the vendor record, but can be overwritten with any of the values in the Delivery 1-3 (ACQ) fields of the vendor record.

**Rush**
Rush order-Rush cataloguing

**Max. arrival days**
This is the maximum number of days that may elapse either since you first created the order (no receipts yet) or received the last volume. You may print a report of Standing Orders that need claims sent to the supplier.

Ignore Subscription start, subscription end, budget cycle and renewal date boxes.
C. **Quantity and Price** tab

**Number of units**
You must enter the number of units you wish to order.

**Unit price**
If you enter the price per unit in this field, you can leave the ‘Total price’ and the ‘list price’ fields blank, as the system will generate these automatically when the record is saved (or the ‘Refresh button clicked).

**Total price**
This is calculated by the system if the unit price is entered.

**Quantity note**
An optional note of up to 100 characters which will be printed on the order slip.
<table>
<thead>
<tr>
<th><strong>Currency</strong></th>
<th>Select the currency in which you will be invoiced by the vendor or choose the currency from the drop down list of currencies that have been assigned to the particular vendor in the vendor record.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>List price</strong></td>
<td>You may enter the estimate of the cost in order to encumber the amount against the appropriate budget or leave it blank and the amount will be calculated by the system by taking the value from the ‘Total price’</td>
</tr>
<tr>
<td><strong>Terms sign &amp; Terms percent</strong></td>
<td>This is an option to indicate whether there is a surcharge or a discount applied by the vendor. We will not be using this feature</td>
</tr>
<tr>
<td><strong>Final price</strong></td>
<td>This is calculated by the system. For our use should be the same as ‘Total price’</td>
</tr>
<tr>
<td><strong>Local price</strong></td>
<td>This is calculated by the system by multiplying the List price by the Terms by the Currency exchange rate</td>
</tr>
<tr>
<td><strong>Price note</strong></td>
<td>An optional note of up to 100 characters</td>
</tr>
<tr>
<td><strong>Encumber budget</strong></td>
<td>If the encumbrance will be on a single budget this is the simplest way to do it. Enter the budget code here or choose from the drop down list</td>
</tr>
</tbody>
</table>

**Step 5. Saving the order**

When you have completed the three tabs of the Order Form, click on ‘Refresh’ to see the calculations applied by the system to the pricing and then click on the ‘OK’ button to save the order. If any mandatory field was left blank or if there are any other problems with the order record, an error message in red will appear at the bottom of the appropriate screen. After you fix the problem, click on ‘OK’ to save the order.
Step 6. Sending the order

After saving the order, you will return to the Order List window. Your order will be listed as ‘NEW”. Click on the ‘Send’ button (or Alt+s) and depending on the order delivery type you have chosen (LE or LI) the order will be printed and ‘sent to vendor (status will change to SV) or the order will be stored on the server for collation with other orders to the same vendor (status will change to ‘ready to send to vendor or RSV).

8. Standing order : Mini-step version

STANDING ORDER (SO)

You are signed onto ALEPH and have opened the Acquisitions Module. You have already completed your pre-order search and you now have a known record in the database from one of the utilities to place your order on. You also know the vendor code and the budget code and that 120 days is the action date interval for claiming.

Placing a standing order on a bibliographic record:

1. Click on Binoculars Icon on the Acquisitions Module toolbar or Orders-find record
2. Click on the title box of the Search for an Administrative Record form
3. Key in your title <enter> or click on search

Two records appear: the Navigation Window and the Order List (Note: the 2nd record is the active one--bar is highlighted in red)

1. Click on Navigation Window for Admin Record No ...
2. Verify that this is the correct record by looking at the Tag/Contents middle frame of the Navigation Window
3. If correct click on Order List of Admin Record ...
4. Verify there are no orders on the Order List Form and click on ADD the only active button

NOTE: Records with orders already on the Order list Form will use "add" or "duplicate" depending on the similarities between your order and the previous order and will be discussed at a later session.
The Order Type form now appears

    Monograph is the default in this form

1. Select the standing order option
2. <enter> or click on OK button

NOTE: if you make a mistake at this point and don't notice it you will only
discover it either when you are filling out the form or when you verify your new
line order on the order list. You cannot correct it and you must delete your order
and start all over again.

An Order Form with three tabs appears: Tab 1: Order Information, Tab 2:
Vendor and Tab 3: Quantity and Price (underlined Tab name is the active part of
the form)

On Tab 1: Order Information

1. Order status NEW is the default .
2. Verify ISSN if there is one and correct if necessary or key in ISSN if known
3. Click on material type box and keyin material type code or select from drop
down list <tab>
4. Key in sub-library code in sub-library box or select from drop down list <tab>
5. Key in acquisition method in acquisition method box or select from drop down
list <tab>
6. Click on Tab 2

On Tab 2: Vendor

1. Key in known vendor code and <enter> (If vendor code unknown see A
   below)
2. Verify that the system generated information on tab 2 is valid for your order
3. Verify if your order is a Fast order or not. Click on Rush box as appropriate
4. Key in maximum arrival days
5. Click on Tab 3

On Tab 3: Quantity and Price appears

    Default for units box is going to be 1

1. Verify that the number of units is 1 in the units box (SO must be 1 only)
2. Verify that Unit price is blank . (No money is encumbered for SO; do not click
on unit price box and key in a unit price)
3. Verify currency is accurate
4. Click on Encumber Budget box and key in known budget code. (If budget unknown see B below)
NOTE: this box disappears from the order form after you have finished
5. Click on Refresh button (Any errors in this 3 tab order form will now be indicated)
6. Correct errors if any
7. Verify that Total price is 00.00
8. Verify that List price, Final price and Local price that was system generated are all 00.00
8. <enter> or click on OK button

NOTE: Tab 3 on standing orders has neither a create item records box or an item collection box and will require an additional step of creating and item record (listed further below)

Order List of Admin Record ... form appears

1. Verify that a new line appears on the Order List of Admin Record ... for the order you just created. It’s status=new
2. Verify that you have the correct order type
3. Verify that you have a budget in the budget column (If no budget appears see C below)
3. Click on send button. This creates the order to send to the vendor.
4. Verify that the status of your new order has changed: status=SV

Create an item record

1. Click on copies on the Order list

Items for order ... form appears

1. Click on new

Item form (3 tabs) now appears

On Tab 1: General information 1

1. Click on sub-library and key in "location"
2. Click on Collection and key in "sub-location"
3. Key in material type
4. Select item status from drop down menu
5. Select item process status from drop down menu
6. Click on update
A. If VENDOR CODE unknown

1. Open drop down arrow to select vendor

2. Vendor List Filtered by ... form appears
   a. Select either name or code in Sort by area
   b. Click on Enter starting box and key in appropriate information <enter>
   c. select vendor (highlighted line) from list in Code/Name box <enter> or click on select button

B. If BUDGET unknown

1. Open drop down arrow to select budget

2. Budget List Filtered by ... form appears
   a. Click on Enter starting box and key in appropriate information must hit <enter>
   b. select budget (highlighted line) from list in Code/Name box must click on select button

C. If BUDGET is missing from order line

1. If there is no budget showing click on encumber button on Order List for Admin Record ...

Encumbrances for order ... form appears

1. Key in the budget in the encumbrance box and click on add budget (if budget unknown see B above)
9. Item records

STANDING ORDERS AND ITEM CREATION

Since the standing order form does not have an automated item creation box like the monograph order form we must create the item manually. The following is a very brief look at Items in Aleph. You will see the Items module in more detail in Cataloguing Module 1 and other training sessions.

ITEMS IN ALEPH

When and where are items created?

NOTIS workflow: In Notis items are created in the final stage of the order/cataloguing process. Processing staff create the item record and barcode the material after it is fully catalogued.

ALEPH workflow: In Aleph items are created in the first stage of the order/cataloguing process. When a bibliographic record (full or provisional) is generated in the system an item record will be created at the same time with an ALEPH system generated barcode.

IN MIGRATION: all bibliographic records with item records in NOTIS/McGill will migrate having an item record. If a record on NOTIS does not have an item record it will not have an item record in ALEPH. (say that there is the I=in process records that are the major bulk of records that will not have an item record??)

How do you know if the barcode is an ALEPH system generated barcode or a real NOTIS/McGill barcode?

All our current NOTIS/McGill barcodes will migrate into the new system looking just like they do now:

3101802290T
All empty items records in NOTIS will have an ALEPH system generated barcode entered in migration. ALEPH system generated barcodes are very distinctive and look like this:

Migrated record barcodes: CVB303-10

Non-migrated barcodes: B000000088

**ITEM Form.**

At the order stage we only use the first tab of this three tabbed item form and are required only to fill in five boxes: Sub-library, Collection, Material type, Item status and Item process status.
Barcode:
*Mandatory:* This number is supplied by the system when the item is created automatically. It can be changed, but must be unique. If you leave this blank, the system will insert a barcode when you click on the refresh button or update button.

Sub-library:
*Mandatory:* The sub-library will be entered from the order, but can be changed. Clicking the button will give you a list of sub-libraries.

Collection:
*Optional:* Enter the code for the appropriate collection or click the button to choose from a list.

Material type:
*Mandatory:* Enter the code for the material type or click the button to choose from a list.

Item status:
*Mandatory:* Enter the code for the item status or click the button to choose from a list. (This will determine the circulation rules and will become active whenever there is no Item Process status filled in.)

Item Process status:
*Optional:* Enter the code for the item Process status or click the button to choose from a list. Although some process statuses are created / modified automatically, you must remove this status when it is no longer needed.
Mini-step version for filling in the Item form Tab 1

1. Click on Sub-library and key in the library or select from drop down menu
2. Key in collection or select from drop down menu

Note: Collection drop down menu only lists valid ones for the Sub-library already entered in the Sub-library box

3. Click on material type box and key in appropriate term or select from drop down menu
4. You must select from the drop down menu for item status
5. You must select from the drop down menu for item process status
6. Click on refresh and correct any errors

Note: Any errors will now show at the bottom of this first tab of the form and must be corrected. An ALEPH system generated barcode will now appear in the barcode box

7. Click on update
10. Exercises

PRE-ORDER SEARCHING IN THE OPAC

1. Look for the following ISBN numbers:

   0133723916  0415116201

Which of the two numbers is in the system already?

Remove the checkmark in the ‘Exact key’ box and search again for the one that was not found. How many records do you find this time? What is the ISBN number on the first record?

2. In the OPAC search for the 2 books below and answer the following questions:

   Title: Mathematical logic and formal systems.
   Series: Lecture notes in pure and applied mathematics ; v.94

   Author: Bolles, Richard Nelson
   Title: What colour is your parachute?

   a) Which of these books is in the library system already?

   b) Does the library hold an American edition for the one that is not in the library system? (Check for variant spelling, i.e. American versus British)

   c) For the title with a series, do we have other books in that series? (Use the ‘Jump’ option)
ORDER LOGS FOR CONVERTED ORDERS AND NEW ORDERS

Search for the following two titles using the Browse option in the OPAC module and push the records to Acquisitions. (Click on the NavMap Button and then the Acquisitions Button – it is not necessary to open the NavMap tree)

One is a converted order and one is a new order.

For each order, open the order log and answer the two questions below, choosing the appropriate questions for each kind of order.

British diplomatic representatives 1789-1852  Order no.: 0009999-1

Archaeology of bookbinding  Order no.: 000024515-00201

Questions for the Converted order:

a) On what date in 1998 was a CLAIM sent with ‘Any news? in the message?

b) In the NOTE of 03 Apr 1997, the dealer reported that the book was n.y.p. (not yet published). What was the due date for the book?

Questions for the New order:

a) Who created this order?

b) On what day and at what time was the Item created?

CREATING A STANDING ORDER

You will each be given two records in this session. You will place orders only on records without a previous order.
11. Helpful Web Sites

General information about the ALEPH/McGill conversion:
http://www.library.mcgill.ca/aleph/

ALEPH/McGill Staff Mode Training site:
http://www.library.mcgill.ca/aleph/training/

12. Contacts

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