

Alma: You've Got Serial Prediction Patterns!



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The bridge to knowledge

ExLibris

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Agenda

Introduction

Set-up

Workflow

Check-in

Summary and resources

Introduction

Alma supports:

- Creation of serial prediction patterns for print journals
- Opening expected issues
- Enhanced check-in



Objectives

By the end of this training session, you will be able to...

- Complete the workflow for setting up prediction patterns
- Perform check-in



User Roles

Three different roles are involved in setting up prediction patterns and performing check-in



- Purchasing operator
- Cataloger
- Receiving operator

Agenda

Introduction

Set-up

Workflow

Check-in

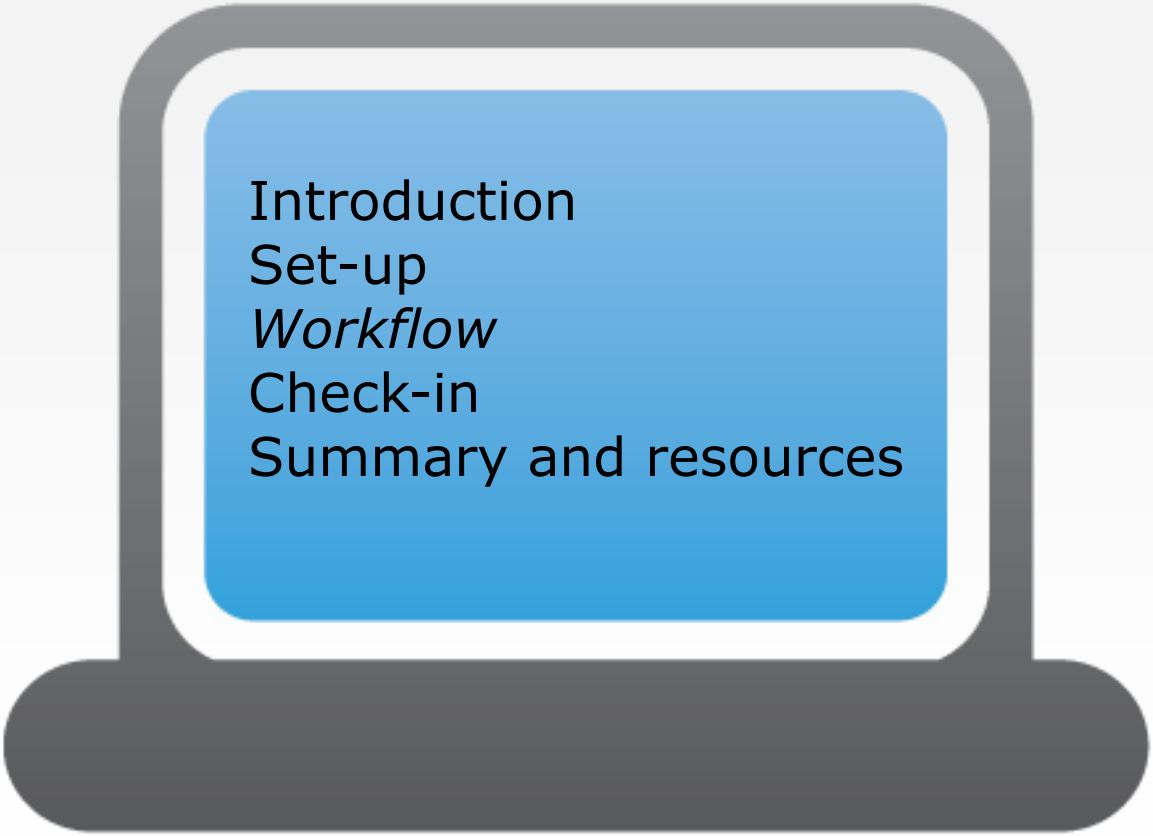
Summary and resources

Setting Up

For prediction patterns to be used there must be:


1. An acquisitions order for the serial item
2. At least one of 853/4/5 captions and pattern fields in the holding record
3. Information registered in the 'Next predicted item's information' field

Agenda



Introduction
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PO Line

 PO Line Summary

[Back to PO Line list](#) Save and continue Go

Description [Popular music., Cambridge University Press, 1-, 0261-1430 0261-1430, ISSN](#)

Order/Line-/ POL-11101 Status In Review (2015-01-26)

Order line type Print Journal - PO Line Owner Music Library

Sent Date -

Summary

Description

Alerts

Invoice Lines

Associated PO Lines

Communications


Interested Users

History

Notes

Attachments

Ordered items

 Quick Add



Number of holdings to create

Library/Location

Library	Location	Call Number
1 Music Library	Music Periodicals	780/.42/05

Receiving note



Vendor information

Material Supplier*  

[EBSCO \(EB\)/ Scholarly Journals \(23456\)](#)

Claiming grace period (days)

Expected receipt after ordering (days)

Or expected receipt date  

Subscription interval

Pricing

List Price*

Net price

Quantity for pricing*

Discount (%)

- Library has POL 11101 for this title
- Subscription begins with v. 34, no. 1
- Order was made with vendor, EBSCO
- Subscription interval is 90 days

Exercise 1

1. Go to *Search External Resources* to locate a Bib record for a journal title not in the repository
2. Import the record and create a PO Line
3. Fill in details for PO Line including *Subscription Interval* and *expected receipt date*
4. Enter *Subscription from and to dates*
5. Enter *Renewal date* and *Renewal reminder period*
6. Order Now!

Caption for Holdings Record

- Many out-of-the-box prediction patterns
- Contain 853 captions and pattern-fields along with 590 note fields

The screenshot displays the ExLibris software interface. At the top, there are menu bars for 'File', 'Edit', and 'Tools'. Below the menus, a status bar indicates 'Record saved at 15:13:56.' and the current record is 'Working on -Popular music.(99786 (22195397)'. The main area shows a Holdings Record with fields: LDR, 00144nx##a22000611n#4500, 008, 1011252u####8###4001uueng0000, 005, 20150126151355.0, and 852 0 \$\$b MUS \$\$c musicper \$\$h ML3469 \$\$i .P66. A dialog box titled 'Expand from Template' is open, showing a 'Choose Template:' dropdown set to 'Books'. Below this, a list of 12 serial prediction templates is displayed, with 'Serial prediction quarterly seasons' selected. At the bottom of the interface, there are buttons for 'Info' and 'Alerts'.

File Edit Tools

Record saved at 15:13:56.

Working on -Popular music.(99786 (22195397)

LDR 00144nx##a22000611n#4500

008 1011252u####8###4001uueng0000

005 20150126151355.0

852 0 \$\$b MUS \$\$c musicper \$\$h ML3469 \$\$i .P66

Expand from Template

Choose Template: Books

Serial prediction daily

Serial prediction daily 6 levels

Serial prediction lacks a top level of enumeration and has continuous issue numbering

Serial prediction monthly combined using 853

Serial prediction monthly omits

Serial prediction monthly regular

Serial prediction quarterly combine

Serial prediction quarterly months

Serial prediction quarterly seasons

Serial prediction semiannual alternative enumeration

Serial prediction semiannual continuous issue numbering

Serial prediction semimonthly

Info Alerts

1. Search for the title for which you just created a PO Line
2. Edit the Bib record
3. Retrieve the Inventory and edit the Holdings record
4. In the Holdings record, go to Edit – Expand from Template
5. Select an appropriate template for your title
6. Save the Holdings record

Next Predicted Item

The screenshot shows the ExLibris software interface. The 'Tools' menu is open, displaying various options. The 'Next predicted Item's information' option is highlighted in the submenu.

File **Edit** **Tools** [Icons: New, Save, Print, Find, etc.]

Record saved at 08:54:53. You have 2 warnings

Working on -Popular music.(9

LDR	00369nx##a22000
005	20150412085452.0
008	1011252u####8##
852 0	\$\$b MUS \$\$c mus
853 0 0	\$\$8 1 \$\$a v. \$\$b n
590	\$\$a A quarterly pul

Tools

- Search External Resources
- View Versions
- Validate Ctrl+U
- Browse call numbers Alt+C
- View Notes
- Release All Records for User
- MARC Bibliographic
- MARC21 Authorities
- MARC21 Holdings** ▶
 - Dublin Core
 - Next predicted Item's information** F3
 - Open predicted items
- Set Management Tags ▶
 - Add another holding Ctrl+Alt+H
 - Add Item Alt+I
 - Duplicate holding
 - View bibliographic record Ctrl+Alt+B
 - Update from Bibliographic Alt+U
 - Relink to a different bibliographic record
 - Generate Accession Number

y connie.braun (26/01/2015 14:46:38 CST)

v q

Jan.) and uses months in the second level of ch

Next Predicted Item

Next predicted item's information

First level of enumeration(a)	<input type="text" value="2"/>
Second level of enumeration(b)	<input type="text" value="1"/>
First level of chronology(i)	<input type="text" value="2016"/>
Second level of chronology(j)	<input type="text" value="01"/>
Issue Date	<input type="text" value="20160101"/>

Remove

Close

1. Place the cursor in the 853 field and go to Tools – MARC21 Holdings – Next predicted item's information
2. Change default values, as appropriate for...
 - First and second level of enumeration
 - First and second level of chronology
 - Issue date
3. Close the Next predicted item's screen

Open Predicted Items

The screenshot shows a library catalog application window. The 'Tools' menu is open, displaying various options. The 'Open predicted items' option is highlighted at the bottom of the menu. The background shows a MARC record for a book titled 'Working on -Popular music'.

File **Edit** **Tools** [Icons: New, Open, Save, Print, Find, etc.]

Record saved at 08:54:53. You have 2 warnings.

Working on -Popular music

LDR	00369nx##a22000
005	20150412085452.0
008	1011252u####8##
852 0	\$\$b MUS \$\$c mus
853 0 0	\$\$8 1 \$\$a v. \$\$b n
590	\$\$a A quarterly pul

Tools

- Search External Resources
- View Versions
- Validate Ctrl+U
- Browse call numbers Alt+C
- View Notes
- Release All Records for User
- MARC Bibliographic
- MARC21 Authorities
- MARC21 Holdings** ▶
- Dublin Core
- Set Management Tags ▶

Right-click context menu (over 'Open predicted items'):

- Add another holding Ctrl+Alt+H
- Add Item Alt+I
- Duplicate holding
- View bibliographic record Ctrl+Alt+B
- Update from Bibliographic Alt+U
- Relink to a different bibliographic record
- Generate Accession Number
- Next predicted Item's information F3
- Open predicted items**

Open Predicted Items

Predicted Items

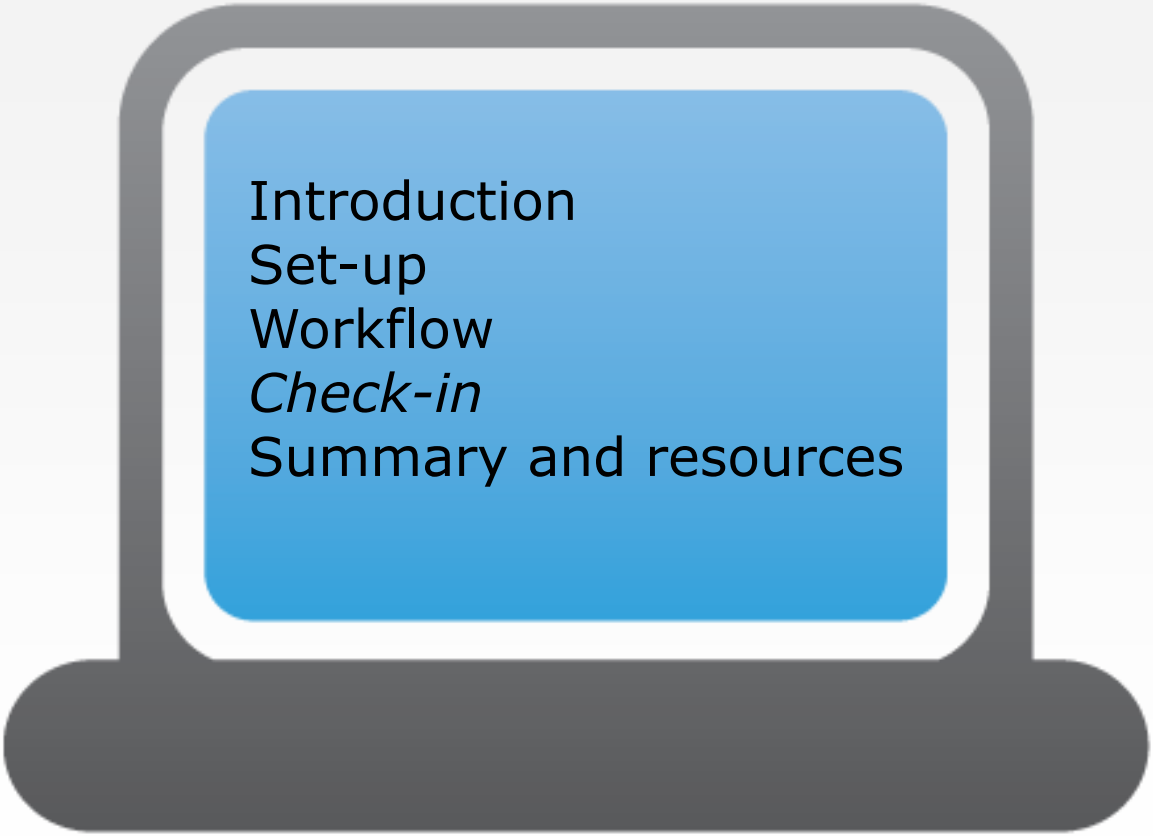
	Description	Status	Expected Arrival Date
1	v.2:no.1(2016:Jan.)	Item not in place	2016-03-31
2	v.2:no.2(2016:Apr.)	Item not in place	2016-06-30
3	v.2:no.3(2016:July)	Item not in place	2016-09-29
4	v.2:no.4(2016:Oct.)	Item not in place	2016-12-30

Discard

Save

1. Place the cursor in the 853 field and go to Tools – MARC21 Holdings – Open predicted items
2. Review the predicted items screen to confirm accuracy
3. If correct, Save the list; if not correct, Discard and begin again

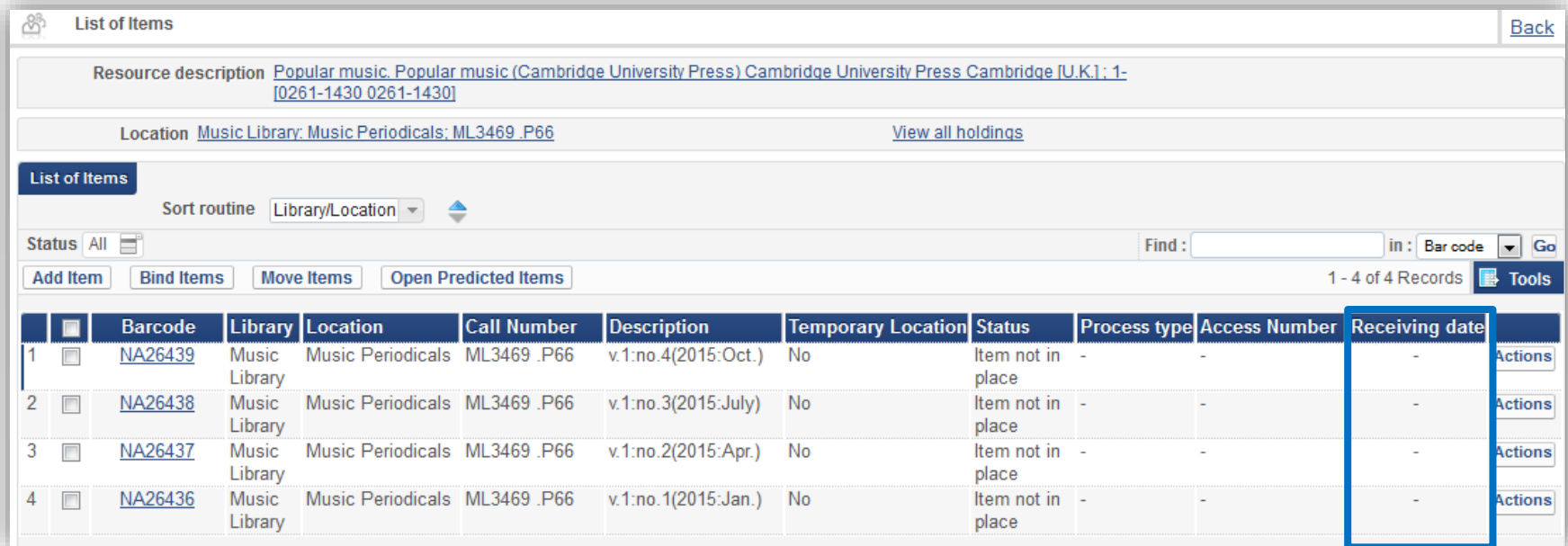
Agenda



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List of Items Before Receiving

All predicted items have been created and display through the list of items; no receiving date is shown because they have not yet been received



List of Items

Resource description [Popular music, Popular music \(Cambridge University Press\) Cambridge University Press Cambridge \[U.K.\] : 1-0261-1430 0261-1430](#)

Location [Music Library: Music Periodicals: ML3469 .P66](#) [View all holdings](#)


Sort routine [Library/Location](#)

Status [All](#) Find : in : [Barcode](#) [Go](#)

[Add Item](#) [Bind Items](#) [Move Items](#) [Open Predicted Items](#) 1 - 4 of 4 Records [Tools](#)

		Barcode	Library	Location	Call Number	Description	Temporary Location	Status	Process type	Access Number	Receiving date	
1	<input type="checkbox"/>	NA26439	Music Library	Music Periodicals	ML3469 .P66	v.1:no.4(2015:Oct.)	No	Item not in place	-	-	-	Actions
2	<input type="checkbox"/>	NA26438	Music Library	Music Periodicals	ML3469 .P66	v.1:no.3(2015:July)	No	Item not in place	-	-	-	Actions
3	<input type="checkbox"/>	NA26437	Music Library	Music Periodicals	ML3469 .P66	v.1:no.2(2015:Apr.)	No	Item not in place	-	-	-	Actions
4	<input type="checkbox"/>	NA26436	Music Library	Music Periodicals	ML3469 .P66	v.1:no.1(2015:Jan.)	No	Item not in place	-	-	-	Actions

Physical Item Editor

 Physical Item Editor Cancel Save

Resource description [Popular music. Popular music \(Cambridge University Press\) Cambridge University Press Cambridge \[U.K.\] ; 1-\[0261-1430 0261-1430\]](#)

Holding [Music Library: Music Periodicals: ML3469 .P66](#) [View all holdings](#)

Barcode NA26436 [View all items](#)

Process type -

Summary

General Information

ENUM/CHRON information

Notes

History

Barcode

NA26436

Copy ID

Material type

Journal

Item policy

Inventory date

Provenance

Holding PO Line

[POL-11101](#)

Is Magnetic

Receiving date

Expected receiving date

26/04/2015

Enumeration A

1

Enumeration B

1

Chronology I

2015

Chronology J

01

Description

v.1:no.1(2015:Jan.)

Generate

Clear

Replacement cost

Receiving operator

Process type

Location Information

Permanent Location Information:

Permanent library *

Music Library

Permanent location *

Music Periodicals

Alternative call number type

Alternative call number

Inventory number

Storage Location ID

Pages

Pieces

Receive Items

Description
[Popular music. Cambridge University Press. 1- 0261-1430 0261-1430. ISSN](#)

Vendor/Account
[EBSCO/ Scholarly Journals](#)

Order/Line
[PO-14714/ POL-11101](#)

Status Ready (2015-01-27)
Order line type Print Journal - Subscription
PO Line Owner Music Library
Sent Date -

Bibliographic Information

Title Popular music.

Identifier 0261-1430 0261-1430

Vendor's Title Number -

Publisher Cambridge University Press

Frequency 3 times a year,

Language eng

Identifier Type ISSN

Publication Place Cambridge [U.K.] ;

Publication Date 1-

Start/End 1987-

+ Holdings Information

PO line Items

Receiving note -
Sort routine Library/Location

Receiving status All Location All

Receive New Items

1 - 4 of 4 Records Tools

	<input type="checkbox"/>	Library	Location	Temp Loc	Date Received	Modified	Call Number	Barcode	Description	Current Step	
1	<input type="checkbox"/>	Music Library	Music Periodicals	No	-	26/01/2015	ML3469 .P66	NA26439	v.1:no.4(2015:Oct.)	-	Actions
2	<input type="checkbox"/>	Music Library	Music Periodicals	No	-	26/01/2015	ML3469 .P66	NA26438	v.1:no.3(2015:July)	-	Actions
3	<input type="checkbox"/>	Music Library	Music Periodicals	No	-	26/01/2015	ML3469 .P66	NA26437	v.1:no.2(2015:Apr.)	-	Actions
4	<input type="checkbox"/>	Music Library	Music Periodicals	No	-	26/01/2015	ML3469 .P66	NA26436	v.1:no.1(2015:Jan.)	-	Actions

1. Go to the Receive Items page and search for your title
2. Click on Actions – Manage Items and receive the first issue

Receive Items

Description
[Popular music., Cambridge University Press, 1-, 0261-1430 0261-1430, ISSN](#)

Vendor/Account
[EBSCO/ Scholarly Journals](#)

Order/Line
[PO-14714/ POL-11101](#)

Status Ready (2015-01-27)

Order line type Print Journal - Subscription

PO Line Owner Music Library

Sent Date -

Bibliographic Information

Title Popular music.
Identifier 0261-1430 0261-1430
Vendor's Title Number -
Publisher Cambridge University Press
Frequency 3 times a year,
Language eng

Identifier Type ISSN
Publication Place Cambridge [U.K.] ;
Publication Date 1-
Start/End 1987-

+ Holdings Information

PO line Items


Receiving note -
Sort routine Library/Location

Receiving status All Location All

[Receive New Items](#)
1 - 4 of 4 Records
Tools

		Library	Location	Temp Loc	Date Received	Modified	Call Number	Barcode	Description	Current Step	
1	<input type="checkbox"/>	Music Library	Music Periodicals	No	-	26/01/2015	ML3469 .P66	NA26439	v.1:no.4(2015:Oct.)	-	Actions
2	<input type="checkbox"/>	Music Library	Music Periodicals	No	-	26/01/2015	ML3469 .P66	NA26438	v.1:no.3(2015:July)	-	Actions
3	<input type="checkbox"/>	Music Library	Music Periodicals	No	-	26/01/2015	ML3469 .P66	NA26437	v.1:no.2(2015:Apr.)	-	Actions
4	<input type="checkbox"/>	Music Library	Music Periodicals	No	02/02/2015	02/02/2015	ML3469 .P66	NA26436	v.1:no.1(2015:Jan.)	-	Edit

List of Items

 List of Items Back

Resource description [Popular music. Popular music \(Cambridge University Press\) Cambridge University Press Cambridge \[U.K.\] : 1-0261-1430 0261-1430\]](#)

Location [Music Library: Music Periodicals: ML3469 .P66](#) [View all holdings](#)

List of Items

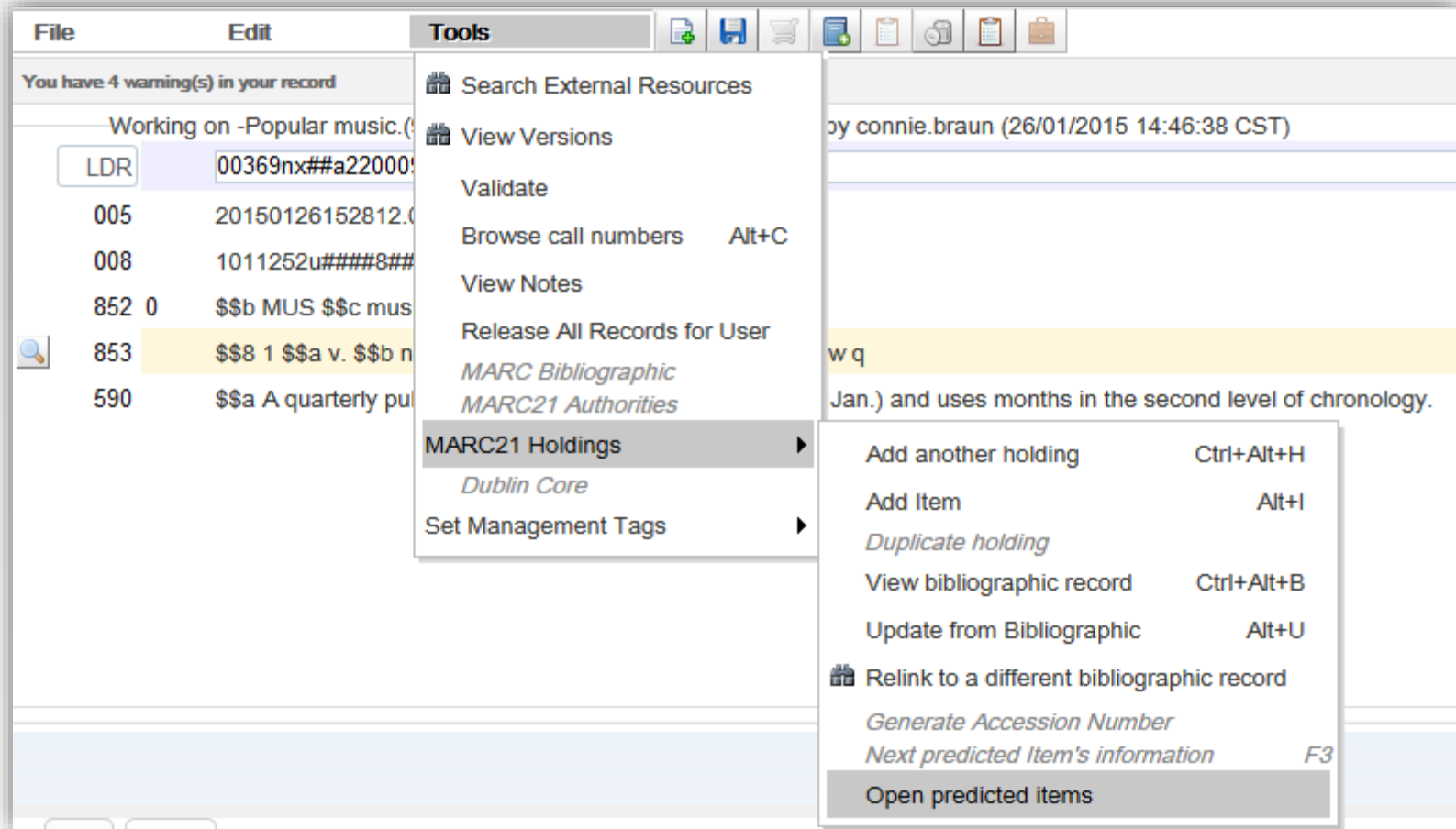
Sort routine Library/Location

Status All Find : in : Bar code Go

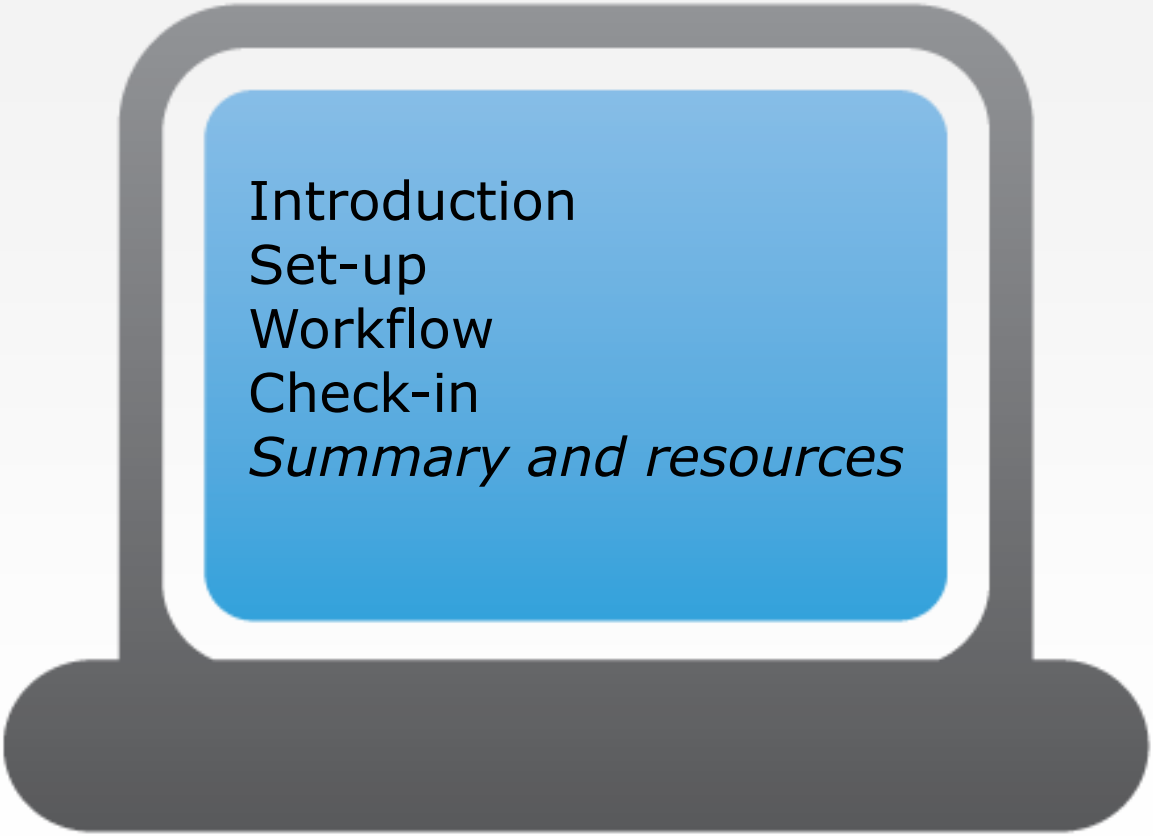
Add Item Bind Items Move Items Open Predicted Items 1 - 4 of 4 Records Tools

		Barcode	Library	Location	Call Number	Description	Temporary Location	Status	Process type	Access Number	Receiving date	Actions
1		NA26439	Music Library	Music Periodicals	ML3469 .P66	v.1:no.4(2015:Oct.)	No	Item not in place	-	-	-	Actions
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Next Volume



Agenda



Introduction
Set-up
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Summary



During this session, we looked at

- The workflow for setting up prediction patterns
- How to perform check-in

Resources

Using Prediction Patterns (Inventory Creation)

- Available via Alma Online Help

This presentation

Thank You

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