

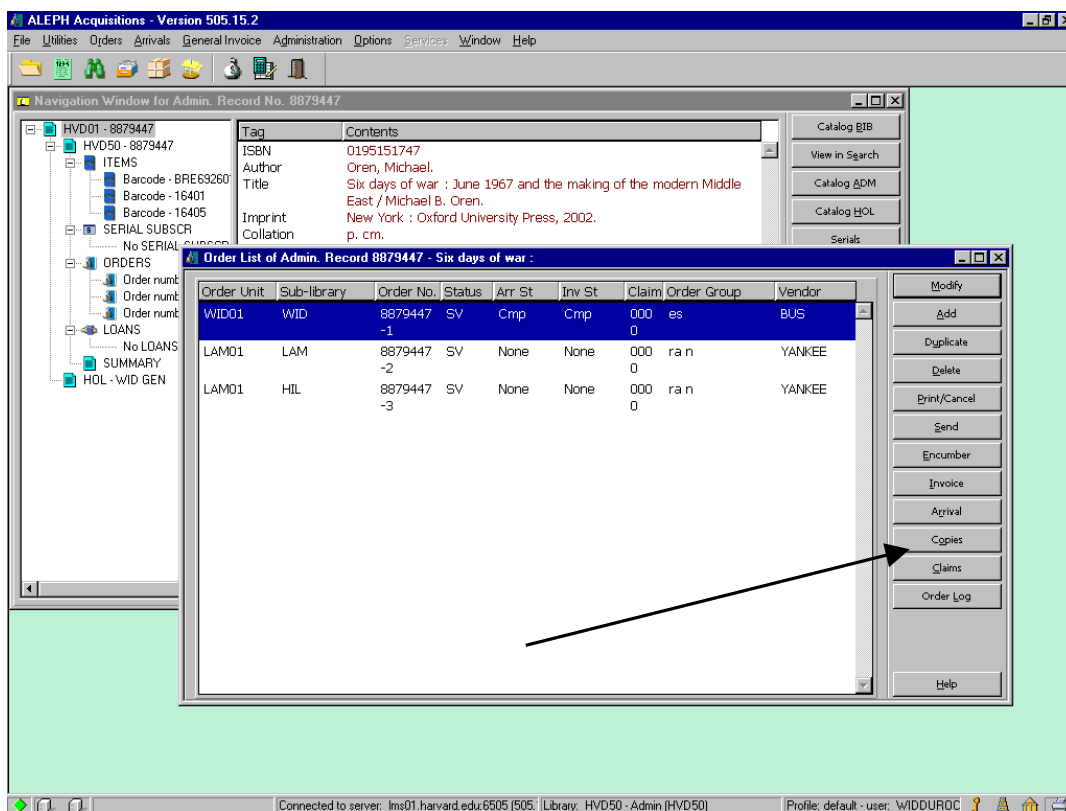
## PATRON REQUESTS – PROCESSING ITEMS RECEIVED IN ALEPH

7 August 2002

Requested items are routed to Materials Management upon receipt and provided to the patron prior to cataloging. These guidelines outline the procedure in Materials Management to prepare the item to circulate to the patron uncataloged.

The procedure ensures that proper status information displays in the OPAC, but Staff module displays are less straight-forward. For information on 1) how these records display in Staff modules and 2) what updates language divisions must make to the item record at the point of cataloging, please consult the document, [Identifying and Processing Catalog Review Materials](#).

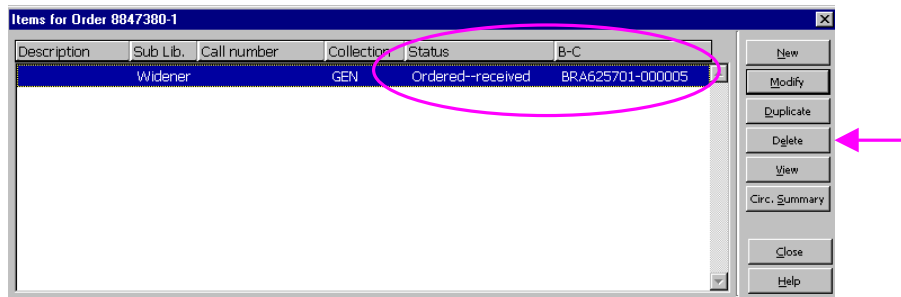
1. Open the Acquisitions module.
2. Use the “Get Order” search (Green page icon on your toolbar OR [Alt + r] ; [o]) to call up the order by Aleph Order number, including the hyphen and sequence digit.
  - This will open the Order List window on top of the Nav map.
3. Verify that you have the correct title by checking the brief bibliographic record displayed on the Nav map.
  - You will need to drag down the Order List to see it properly.



4. Highlight the appropriate Widener order in the Order List and click the Copies button (as indicated in the illustration above).
  - This will bring up a list of item records associated with that order.

- Be sure to customize your header so that the following fields are displaying:
  - Description
  - Sub-library
  - Call number
  - Collection
  - Status
  - B-C (i.e. Barcode)

5. Select the appropriate item record which has a Status of “Ordered-Received” and a system-generated barcode number, rather than a valid Widener Stacks or Harvard Depository barcode.



- As illustrated above, most cases will only have 1 item in the list. For multi-part works, you may have to select from a list and, in addition to the Status and Barcode fields, pay close attention to the Call number and Description information to select the correct one.
  - Please be aware that a bug in the system causes some items to have a “Complete” arrival status, but the Item Processing Status will still say “On order” in this list.
6. Click the Delete button to remove the Item Record which was created at the point of order.
  7. Click Yes to confirm the deletion.
    - At that point, all the buttons will become grayed out except for the New button.
  8. Click the New button to create a new item record.
  9. \*\*On Tab 1 of the Item Form, scan the physical barcode into the Barcode field.
  10. \*\*If a Holdings Record exists, create a link to it by selecting the expansion arrow on the Hol. Link field and double-clicking the WID GEN record number. *Not all records will have one!*
    - If no WID GEN holdings record exists, hit the [Esc] key to exit the selection box.
    - The client’s Acquisitions module Item defaults should be set to fill in the following additional fields on Tab 1:
      - **Sublibrary:**                    **WID**
      - **Collection:**                    **GEN**

- **Material Type:** [ \* default is **BOOK** -- update as needed]
  - **Item Status:** [\* default is **01** for normal loan – update as needed]
- As shown in the illustration below, the client’s Acquisitions module Item defaults should be set to fill in the following fields on Tab 2:
- **OPAC note:** **Ordered—received**
  - **Circ. note:** **SEND FOR CATALOG REVIEW**

- Both of these fields are critical for providing accurate status information in the OPAC while the item remains uncataloged, as well as for ensuring that the book is returned for cataloging after patron use.

11. Click the Update button to save your work.

- To go on to another search, you must close the Item list window.
- After a notification email is drafted to the patron, the item is sent to Widener in the daily Priority bin and shelved at the Circulation Desk under the patron’s name.

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\* See document “Creating Item Records for Non-Book or Special Loan Materials”