

Ordering Serials: Creating S-Type Orders in Aleph

7 March 2003

Procedure supplied by the Head of Serial Records, 16 January 2003. Contact your Division Head if you have any questions about using this procedure in your Division.

NOTE: As of 16 January 2003, the title, *Best American Political Writing*, is an example of an order created this way.

Start in the Cataloging module:

1. Pre-order Searching

In order to avoid duplicate record creation, it is advisable that you search Aleph first to see if a record for the new title already exists.

2. Bibliographic Record for New Title

If a bibliographic record already exists in Aleph for the new title, by all means, use it. If no record exists, create a new provisional record in the cataloging module from scratch, from a template, by duplicating or by importing a record from an external database. These methods are described in [the Learner's Guide for Cataloging for Non-catalogers \(CATN\)](#), Lesson 2, called *Moving a Bibliographic Record into the Cataloging Module*. This information may also be found in [the Learner's Guide for Cataloging for Catalogers A \(CATA\)](#), Lesson 3.

Minimally the bibliographic record for the new title should include the 022 and the 245 fields. Save the bib record to the server, but leave the record open on your screen.

3. Push into Acquisitions Module by clicking on moneybag icon on toolbar.

You are now in ACQ:

4. If no order exists for your sublibrary click Add on the Order List.

NOTE: *Many of the steps outlined below may be avoided if you have previously saved your defaults.*

- Select Serial for order type and click **Ok**.
 - In Tab 1 of the Order Form click on **Order Status** and choose whatever order status is needed for placing your order with the particular vendor. Enter:
 - the correct **ISSN (if you have one – do NOT use an ISBN!)**,
 - **Order Group**
 - **Material Type (SE)**
 - **Sublibrary (WID)**
 - **Order Unit (WID03)**
 - **Acquisition Method**
 - Add note such as “Route to ...” in Library Note field on Tab 1, if desired.
 - In Tab 2 of the Order Form, enter appropriate Vendor information. **Vendor Note** should include the starting volume information. Enter **Subscription Start** and **End** dates. (start=today's date & end=12/31/2099)

- In Tab 3 of the Order Form, fill in:
 - **Number of Units (1)**
 - **Unit Price (\$0.01)**
 Click **Refresh**. Then encumber the appropriate budget.
- Click on **OK**.

5. Add Holdings Record (still in Acq)

- Go to Navigation window and click “Catalog Hol.”
 - Click “add record”
 - Highlight the one you just created and click “edit”. Holdings window opens in cataloging module.
 - Highlight the **LDR field** and click Edit/Open Form
 - Change “type of record” to y (serial item holdings) & click “OK”
 - Highlight the **008 field** and click Edit/Open form
 - Change “Receipt or Acquisitions Status” to 3 (on order) & click “OK”
 - Create **852** with subfield b “WID”
 - add an “**own**” field by clicking Edit/Fix Record
 - Highlight “create OWN field from 852 subfield b” and click “OK”
 - Add an **H08** field with subfield a “p” (for preliminary)
- Save the record to the server (this step allows the public catalog to display the title with the status of “on order”)