# ITEM Learner’s Guide

## Item Processing in Aleph

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1. Introduction

This class documentation provides information needed to edit and end-process monographs and serials in Aleph for both the stacks and the Harvard Depository (HD) and covers all processes involved in updating or creating an item record to reflect its housing status.

The following topics will be covered:

1. Selecting the proper bibliographic record for the item being end-processed
2. Understanding the Item List
3. Identifying the difference between item records for monographs or serial issues to be bound (how to identify what sub-library, copy, and volume or issues a particular item record belongs to, for example)
4. Barcoding monograph volumes for the stacks and HD
5. Barcoding serial volumes for the stacks and HD
6. Creating item records
7. Setting defaults for creating item records
8. Using the “Bind/Changes” function to merge and edit item records in order to prepare serial issues for binding
9. Charging end-processed items to a pseudo-patron ID
10. Setting the Item Processing Status using the Item Process Status utility

1.1 Access the Items Tab

1. Click on **Start>Programs>Aleph 19** and select the **Cataloging Module** from the drop down menu
2. Type in the username and password when prompted

Aleph will remember the tab you were last working with in the module, so the module may open to a different tab other than the Items Tab. To access the Items Tab, you can click on it or press the **F8** key.

The **Items Tab** is used for the creation and editing of item records, binding and labeling materials.

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1.2 Layout of the Items Tab - Cataloging Module

**Title Bar:** Name of Module, Library and Server Information.

**Menu Bar:** Main menu options. You can open up these menus using the keyboard equivalent `<Alt> + the first letter of each menu choice`.

**Cataloging bar:** The Cataloging bar allows you to input a system number to call up a bibliographic record in HVD01. When you input a system number into the Cataloging bar, the record will display in the Upper Pane. To access the Cataloging Bar, click on it or press the `<Ctrl> + 5` keys.

**Record Information:** Once you bring up a record using the Cataloging Bar, the system number, record format, title and author information displays next to the Cataloging Bar.
You will also see icons to the right of the Cataloging bar that will perform specific functions. These icons are defined in the *CATA: Creating and Editing Bibliographic and Authority Records* Learner’s Guide.

**Item bar:** The Item bar allows you to input a barcode number, Bib Sys. No. or ADM number to retrieve an item record. Once you input a search, the system will open up the Items Tab and the Items List will appear in the Upper Pane of the module. If searching by barcode, the item containing the barcode you input into the Item bar will be highlighted on the list. Otherwise the first item will be highlighted. If you click on the box with the three dots next to the Item bar, a dialog box will open that will allow you to search for an item by the call number found in the item record. To access the Item Bar, click on it or press the <Ctrl> + 6 keys.

**Record Information:** Once you bring up a record using the Items Bar, the system number, record format, title and author information displays next to the Items Bar.

![Figure 3: Items Bar](image)

To the right of the title, you will see two icons:

The **Clear Item** icon: This icon will clear the items list that is in the Items Tab. You can set your own keyboard equivalent for this icon using the method described in the *STFS: Introduction to Aleph and Search Options* Learner’s Guide.

The **Push to Cataloging** icon: This icon will move a title from the Item Tab into the Record Tab where you can edit the bibliographic record. You can set your own keyboard equivalent for this icon using the method described in the *STFS: Introduction to Aleph and Search Options* Learner’s Guide.

**Upper Pane:** This will contain the Items List- list of all items owned by all libraries associated with the title. To put the Items List in focus, click on the Upper Pane or press the <Ctrl> + 2 keys.

**Lower Pane:** This will contain the Item Record information for whatever item is highlighted in the Items List. To put the Items Record in focus, click on the Lower Pane or press the <Ctrl> + 3 keys.

**Navigation Pane:** The Navigation Pane contains all of the functions that you can use on the Items Tab. To put the Navigation Pane in focus, click on the tab or press the <Ctrl> + 1 keys.

**Main Tabs:** Tabs that indicate a specific functional area within the module. In Cataloging, there are three tabs:

- **Record tab:** Used for creating and editing bibliographic, holdings and authority records.

- **Items tab:** Used for creating and editing item records, binding and labeling.
Administration Tab: Access the Print Daemon from the administration tab to activate and print Aleph Print Products.

Search tab: Used for searching for bibliographic and authority records.

Operations Bar: The Operations bar contains icons that you can use to open up another module such as Acquisitions or Circulation.

Opens Module, Does not Push: Note that you cannot use the icons on the Operations bar to push a title into another module. If you select another module from the Operations bar only the module will open, and you will need to search for a title in that module.

Other icons on the Operations Bar: The bar also displays the icons to change your password/log in information, database options and language icons. The orange X will close Aleph completely, all modules at once. The operations bar will also display server prompt messages such as "Processing request."

2. Definition of an Item Record in Aleph

An Item Record is a record affiliated with a bibliographic record which tracks the status of a physical unit of library materials throughout all stages of its library processing, from ordering to circulation.

All elements of this definition are important. First, an Item Record must be affiliated with a bibliographic record. There is no such thing as an "unlinked" Item Record in the Aleph environment.

Second, the Item Record tracks the status of a physical unit in Aleph. For example, in Aleph, an item record is created for each periodical issue checked in. When individual issues are brought together to be bound in one physical volume, then the item records are also merged into a single item record.

Third, the Item Record tracks an item throughout all stages of its library processing, from ordering to circulation. In Aleph, it is the Item Record which causes the display of statuses such as “On Order” and “Ordered-Received” in the public catalog for monograph titles. Therefore, Item Records in Aleph are generally created for monographs in all physical formats—for example books, videos, CD’s, CD-ROMs, etc.—at the point of ordering, although they may also be created at the point of receipt or later, depending on workflow. For serials, item records may be system-generated—in those cases where predictive check-in has been implemented, or manually created by staff—in those cases where issues being added one at a time. Item Records are generally created prior to receipt of the serial issues, but also may be created at point of receipt or later, depending on workflow.

As materials are received, cataloged, and end-processed, the status codes in the Aleph Item Record are updated, so that their status can be tracked through all the stages of technical services processing.

Item records can be created and edited in the following modules:
- **Cataloging Module, Items Tab**: Generally used for end processing materials, for gifts without orders, other type of piece-in-hand materials, binding and labeling.

- **Acquisitions/Serials Module, Order Tab**: Items can be created by the system at the point of order for a monograph record, or by staff at the point of receipt for a standing order.

- **Acquisitions/Serials Module, Serials Tab**: A set of predicted items representing issues for a periodical volume can be created all at once by Aleph, or items can be created one at a time by staff for those titles not being predicted in the system. Serials staff who are involved with binding can also use the Bind/Change feature, which is available on this tab as well as in the Items Tab in Cataloging.

- **Circulation Module**: Items can be created when a patron brings a book to the Circulation Desk that does not contain a barcode. In this way, the book can be circulated immediately.

In many libraries, item records for monographs will be created automatically at the point of ordering. When they are, the item record is created without an actual physical piece in hand or a holdings record. Aleph generates a system-supplied numeric identifier, or barcode, for the item and places that in the barcode field. This barcode is replaced later with a permanent one when cataloged. Aleph also creates system-generated barcodes for items created for individual issues of a periodical.

The status of a book during the acquisitions, cataloging, and shelf preparation processes is generated by the item record. Item records are used for tracking items as they move from one department to another. These are used for locating an item after it has been placed on the shelves. They are necessary for Circulation control and serials control and can be used for various reporting functions.

Copy specific information can be recorded in the item record.

### 2.1 Definition of a Barcode in Aleph

Each Aleph **Item Record** includes a unique item identifier. In Aleph, this item identifier is called a Barcode, but it actually does not always correspond to a physical barcode. When the item record is created (whether at point of ordering or receipt), Aleph creates a system-generated Barcode number. This number will be replaced with the physical barcode number at the point that the physical barcode is placed on the item at the time of end-processing, if your library uses physical barcodes.

When looking at the Aleph barcode field, it is possible to tell whether it contains a system-generated barcode or a physical barcode number by its format.

- A **Harvard stacks barcode** is 14 digits, and begins with 32044.

- A **Harvard Depository barcode** is 6 alpha-numeric characters long, beginning with a two-letter code (HH, HL, HW, etc.). Note that most libraries now use the Harvard stacks barcode to send items to the Depository, but there are many Harvard Depository barcodes that you will still see in Aleph.

- An **Aleph system-generated barcode** is numeric, with a varying number of digits, and may also include a sequence number suffix.

When end processing a monograph or periodical, it is important to verify if the item record contains a system-generated barcode or a physical barcode. If it is a system-generated barcode,
and your library uses physical barcodes, it will be necessary to replace it with a physical barcode. If it is a physical barcode, you should verify that the physical barcode is actually on the item.

3. Searching for and Retrieving Item Records

Within the Cataloging Module, there are a number of ways to locate item records: using the Item Bar, the Search Tab and the Records Manager Pane on the Records Tab.

3.1 Searching by Item Bar

You can search for an item by its barcode, Bib Sys no. or ADM number using the Item bar in the Cataloging Module.

To search by barcode:

1. Scan or type in the barcode and click the arrow key (or just press the Enter key).

   ![Barcode Search Using Items Bar](image)

   Barcode Search Using Items Bar

To search by Bib Sys No. or ADM No.

1. Select the appropriate choice from the drop down menu

2. Type in the bib sys number or ADM number in the field to the right and click the arrow key (or just press Enter).

   ![BIB Sys No. Search using Items Bar](image)

   Bib Sys No. Search using Items Bar

When you bring up an item in the Items Tab, you will see the SYS number, bib number, title and author (if the record has one) at the top of the screen in the Items Bar. An Item List will display in the Upper Pane.
Barcode index selected (note: display is AFTER barcode was scanned in and Enter key was pressed)

System No., ADM No, Title appears next to Item Bar.

Item highlighted on list will be item with barcode that was searched in item bar

Details of highlighted item appear in lower pane

Item Barcode Search Result

If searching by barcode, the item record that corresponds to the barcode you entered into the Item Bar will be highlighted on the List. If searching by BIB Sys. No. or ADM Number the first item that appears on the Item list will be highlighted.

3.2 Searching By Call Number

NOTE: IT IS NOT RECOMMENDED THAT YOU USE THIS SEARCH TO LOCATE ITEM RECORDS. A description of how the search currently works and why it is not useful is described below. IF YOU WISH TO SEARCH BY CALL NUMBER, USE THE CALL NUMBER SEARCH FOUND IN THE SEARCH TAB.

Clicking on the List Box next to the barcode field on the Items Bar brings up a window that allows users to search for items by call number.

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When you bring up the Call Number search, a dialog box will open.

1. In the second box, select the call number type you want first by clicking on the drop down arrow and selecting the appropriate classification scheme from the list.

2. In the first field, type the call number you want to search to find. You can type the point where you wish to begin searching in the first box.

**How to enter a call number based on its classification scheme:**

- If searching for an **LC call number**, type the beginning of the call number (e.g. kf1) and hit the <Enter> key. You will be brought to the point closes to what you searched.

- If searching for a **type 7 call number**, you must type $$Z and the library value, then $$h and the call number (e.g. $$ZHCL$$hSoc). Then hit the <Enter> key.

- If searching for a **type 8 call number**, you must type $$h before the call number (e.g. $$hITA 580) Then hit the <Enter> key.

**Please note that not all call numbers will appear in this index.** If you cannot find an item by call number using the list box, proceed to the **Search Tab** and perform a browse search by call number and push the title into the Items Tab using the method described in section 3.3 below.
When you find your item, make sure it is highlighted and click the Select button. The Items Tab will open, the Items List will appear in the Upper Pane, and the item will be highlighted on the List.

3.3 Searching using the Search Tab

You can use the Find and Browse Searches in the Search Tab to find a title. Click on the Search Tab or hit the F9 key to open the Tab.

The process of searching a title is covered in the STFS: Introduction to Aleph and Search Options class. A brief demonstration of searching will be provided here. Since most end processing units are searching for a piece in hand, we will review the Browse Search, where an exact title search can be performed for your title. The Browse Search can also be used to search call numbers.

**Browse Search Review:**

Click on Browse or type <Ctrl>+<Alt> + B to open the Browse Search

Select Titles from the Headings List

Search for your title. The Browse List of Titles will open beneath your search

Highlight the title form the Browse List and click the Show button on the right hand side or type the <Alt> + W keys to open the Show Node.
When the **Show Node** opens, review the title in the **Full + Link** display in the Lower Pane to confirm that the title matches the piece you have in hand. Then click the **Items Tab** button (or press <Alt> + B) to open up the **Items Tab**.

![Screenshot](image)

Search Tab, Show Node: Push to Items by Selecting Items Tab Button on Lower Pane

When you bring up an item in the **Items Tab**, you will see the SYS number, bib number, title and author (if the record has one) at the top of the screen in the **Items Bar**.

### 3.4 Loading Items from the Records Tab

If you have been editing a bibliographic record in the **Records Tab** in the **Cataloging Module**, you can move an item from the **Records Tab** to the **Items Tab** by using the **Record Manager pane**.

The **Record Manager** pane is only found in **Cataloging Module** on the **Records tab**. The pane displays bibliographic, holdings and items information. You can see the items associated with each holdings record in this display. Double-clicking on an Item will open up the Item Record in the **Items Tab**. Note that Aleph sets a display limit of 99, so all records may not be viewable in this display.

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To Open Items from the Record Manager:

- Use Shift + Tab to put the Record Manager Pane in focus, or click on the Pane.
- Highlight an item on the Record Manager (by clicking on it or using the down arrow keys to highlight the item).
Select Barcode on Record Manager Pane

- **Double-click on a barcode** in the **Record Manager Pane** to open the **Items Tab** to the **Items List**. The item record of the barcode you double-clicked on in the **Record Manager Pane** will be highlighted on the **Items List**.

If there are no items in the **Record Manager Pane**, **double-click on the word ITEMS** in the **Record Manager Pane**. This will open up the **Items Tab** where you can then create an item record.

If you wish to use keyboard equivalents, highlight the item, then press the <Alt> + M keys to open up the **Records Manager** menu, then press the letter L (or hit the Enter key) to load the item into the **Items Tab**.

When you bring up an item in the Items Tab, you will see the SYS number, bib number, title and author (if the record has one) at the top of the screen in the Items Bar.
4. The Items Tab Functional/Overview Modes and the Item List Root

4.1 Functional and Overview Modes

The first modes you will see on the Items Tab are Functional and Overview. You can use the keyboard equivalents <Ctrl> + <Alt> + 1 (the number 1) to move to the Functional Mode and <Ctrl> + <Alt> + 2 to move to the Overview Mode.

**Functional Mode**: The Functional radio button will be selected by default when you open the Items Tab. This means that you are looking at the functions on the Items Tab.

**Overview Mode**: The Overview Mode will bring you to a display of the bibliographic record information and a layout that will display bibliographic, holdings, items, orders, subscriptions and loan information about the title. This is where you will push a title to another module such as Acquisitions or Circulation by clicking on the appropriate button on the right hand side (or choosing the <Alt> + the underlined letter on the button).
4.1.1 Interpreting the Overview Node Navigation Pane

- **HVD01-[Aleph system number]**: When this is highlighted, a display of bibliographic, holdings and call number information displays in the center pane. This display can be printed by putting the center pane in focus and hitting the <Ctrl>+P keys.

- **OBJECTS**: Beneath HVD01, you will see a pyramid icon. This represents the Aleph Digital Assets Module, or ADAM, introduced in Aleph Version 17.01. Harvard is not using ADAM at this time, so you will see no records associated with this icon in the Overview Mode display.

- **HVD60**: This is a display of all of the holdings records associated with the title. Beneath the holdings record is Barcode information for any item records that are linked to the holdings record. If you highlight any of the holdings or barcodes, you will see a display of that data in the center pane. Use <Ctrl>+P to print this display.

- **HVD50**: This is administrative data including any Orders, Subscriptions, Items not linked to holdings and Loans made on the title. By clicking on a specific order, subscription, item or loan, you will see more detailed information about the order, subscription, item or loan in the center pane. Again, use <Ctrl>+P to print this information.

The **buttons** on the right hand side of the **Overview** allow you to move the title from the Order Tab to another part of Aleph. The buttons on the right are:
• **Catalog Record button**: If you click on the **Catalog Record Button** (or press the <Alt>+C keys), the **Records Tab** in the **Cataloging Module** will open and the bibliographic record will be displayed in the Upper Pane.
  
  - If you need to go directly to a holdings record in the **Records Tab**, you must **highlight a holdings record** on the Navigation Pane under HVD60 on the left hand side of the **Overview Node** and then click on the **Catalog Record button**. This will bring you directly to the holdings record.

• **Items Tab button**: The **Items Tab** button will return you to the Functional node, or you can simply click on **Functional** from the Navigation Pane or press the <Ctrl>+<Alt>+1 keys on your keyboard to return t the functional display on the **Items Tab**.

• **Circulation**: This button will open the **Circulation Module** and the title will display on the **Items Tab in Circulation**.

• **ILL**: This button will push the title to the **Interlibrary Loan Module**. Since Harvard has not yet implemented the Aleph ILL Module, you will not be able to do anything with the title here.

• **Order Tab**: This will open the Acquisitions/Serials Module and push the title to the **Order Tab** where you can order or edit order information.

• **Serial Tab**: This will open the Acquisitions/Serials Module and push the title to the **Serial Tab**.

• **Push to Search button**: The **Push to Search button** push this title to the **Search Tab** in the **Cataloging Module**.

To return to the functional display, click on the **Item Tab button**, or click on **Functional** on the Navigation Pane, or press the <Ctrl>+<Alt>+1 keys.

### 4.2 Items List Root

Beneath the **Functional** and **Overview Modes** on the Navigation Pane you will see the **Items List Root**.
Items List Root selected

Item list displays all items from all libraries

Item highlighted in upper pane

Details of highlighted item appear in lower pane

Items Tab: Functional Mode, Items List

You can access the Root by clicking on it on the Navigation Pane or pressing the <Ctrl> + <Alt> + L keys.

Next to the words Item List Root you will see a display of numbers in parentheses. The first number relates to the circulation transactions that have taken place on the items in the Items List. The second number displays the total number of item records that you can edit based on your login for this title.

Note: Do not assume that the item highlighted on your Item List is one of the items out on loan. On the items list, look at the Loans column. Those items that have an asterisk (*) next to the number of loans are the items that are currently out on loan.

4.2.1 The Items Tab - Upper Pane

The Upper Pane will display the Items List. Highlighted on the Items List will be the item that was called up by barcode or selected in the Record Manager on the Records Tab. If the record was pushed from the Search Tab, or searched by BIB Sys no or ADM from the Items Bar, the first item associated with that title will be highlighted on the list.

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4.2.2 Item List Column Headings

A number of column headings can display on the Item List. You can add or subtract to the column headings in the Items List by following these steps:

1. **Right click** next to the words on a column heading to bring up the **Header Configuration box**.

2. **Check off** the column headings you want to display in the Items List. **Uncheck** any columns you do not want to display on the Items List.

3. Click **OK** to save your changes.

The columns will remain persistent on your workstation until you change them.

**Column Headings:** The column heading choices include on the Items List are:

- **Item Seq.**: Barcode Sequence No.
- **Subn Seq.**: Subscription Sequence No.
- **Hol no.**: Holdings Record Number
- **Hol +**: Holdings Record number + sublibrary, collection and call number information
- **Sublib**: The full name of the sublibrary
- **Sublib code**: The three-letter code of the sublibrary
- **Coll**: The full collection name (note: GEN will display as blank)
- **Coll. Code**: The collection code
- **Temp Loc**: If the item has a temporary location, a red checkmark will appear in this column.
- **Call no.**: Call number from holdings record

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- **Descr**: Piece level information (v.1, v.1:no.1 (2003:Jan.), for example)
- **Pages**: If you wish to record the pages of a serial that has continuous numbering, you can enter this information on the Item Form and that information will display in this column.
- **Copy no.**: the Copy number from the Copy ID field of the Subscription
- **Barcode**: The item’s barcode
- **Notes**: If the item contains an OPAC Note, Circulation Note or Internal Note, a red checkmark will appear in this column
- **Loans**: Total number of times the item has been loaned, if any. If the item is currently out on loan, an asterisk will appear in this column next to the number of loans.
- **Item Stat**: The Item Status written out (e.g. “Regular Loan”, “In-Library Use”, etc.)
- **Item Stat. Code**: The Item Status display by code (e.g. “01”, “02, etc.)
- **Expected Arrival**: The Expected Arrival Date of an item; associated with serials that have not yet arrived in Aleph.
- **Arrival**: The date a serial issue arrived in Aleph.
- **Claim**: The number of claims made on the item.
- **Vendor**: If the item is attached to an order, the vendor code of the Vendor that is associated with the order will display in this column.
- **Enum-a**: If there is any data in the Enum-a field on the Serials Levels tab, that information will display in this column.
- **Call No.2**: If there is any data in the call number 2 field on the Item, it will appear in this column (note: this field is not used at Harvard).
- **Direct**: Not used at Harvard.

### 4.2.3 Buttons on the Items List

To the right is a series of buttons that can be used with the Items List

- **New**: Add a new Item
- **Duplicate**: Duplicate an Existing Item
- **Delete**: Delete one or more items (you must have authorization in your login to do this)
- **Label**: Print a single label for a single item. To print labels for a group of items, use the Utilities>Print Item Labels menu option.
- **Global Change**: Available to users with Moving Records functionality. Used to make global changes on a selected set of item records.
- **Bind/Change**: Select a set of items to merge into a single item record representing the bound volume.
- **Completed Volumes**: Not in use at Harvard.
- **Refresh**: Will refresh the Items List based on changes made to an item.

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4.2.4 Item Sorting Options

At the bottom of the **Items List** is a box that provides sorting routines for items in Aleph. There are five sorts available in the **Items Tab**:

![Item Sort Routines](image)

**Item Sort Routines**

Here are the basics of how item sorting works in Aleph:

**Default Sort in Aleph Modules:**

- Each Aleph module has its own sort options choices for the **Items List**.
- In addition to the **Items List** sort, the **Serial Tab** in Acquisitions also has another default item sorting routine. This routine is used for item sorting in the **Check-In Node** and for item sorting under the **Subscription Root** in Serials.
- Sorts can be changed by choosing a different sort routine from the drop down menu in the **Items List** in each module.

**Types of Sort Routines Available in Aleph:**

- Aleph uses different sort routines based on the item’s material type.
- Items that have a material type beginning with “ISS” (ISSUE, ISSBD, ISSCD, etc.) have different sorting rules than other items. Aleph refers to the sort routines for these types of materials as “issue sorts”. Most serial items in Aleph have a material type beginning with “ISS.”
- All other item that have a material type OTHER THAN ISS (e.g., Book, CD-ROM, etc.) uses what is known as “non-issue sorts.”

**Sorting Criteria for Items**

- Aleph first looks at the **Material Type** of the item to determine if it has a material type beginning with ISS-. This information is found in **Tab 2** of the **Item Form** in the **Material Type** field.
- Aleph then consults **Tab 5** of the **Items Form, “Serial Levels,”** to determine if there is any data found in the **Enum** or **Chron** fields. Aleph consults these fields regardless of whether or not the item has a material type beginning with “ISS.”
- If there is no data in **Tab 5**, Aleph then looks at the **Description Field** of the item (found on **Tab 1** and/or **Tab 4**) and/or the item’s barcode sequence number. The barcode sequence number cannot be viewed on the **Item Form**; you can add a column to the **Items List** in Cataloging, Serials or Circulation to see this information.
- When Aleph looks at the **Description field**, it will display any data found there using a **character-by-character display**. This means that the display will show v.10 before v.2, because Aleph is looking at each character, NOT the number (it relies on the data in Tab 5 for a number sort).

Revised: September 9, 2008
Depending on the sort routine used, Aleph may also consult the **Item’s holdings record number** (if the item is linked to a holdings record) and/or sublibrary information. When looking at sublibrary information, the system looks at the **Sublibrary code**, not the full name of the sublibrary.

### Item Sorting Problems at Harvard

- **“Mixed” item data**: There are many item records that were converted into Aleph from the previous system used at Harvard that have piece level (Description) data but could not be converted into the enumeration and/or chronology data into Tab 5 of the Item Form. This is a particular problem for serials, because this means that we have many item records that do not have data in Tab 5 of the Item Form, but if the serial title is currently being checked-in in the Aleph Serials Tab, new items WILL have data in Tab 5.

- When this happens, Aleph will sort the items that have data in Tab 5 **BEFORE** the items that have no data in Tab 5, regardless of whatever sort routine is defaulted or invoked by staff online.

- The second sorting problem for Harvard is that there is no issue sort routine for items that base the sort on sublibrary, collection, copy number, enumeration and chronology. Most issue sorts use chronology first as the sorting criteria. We hope to see a new sort routine from Ex Libris to handle this problem in the near future.

### Sort Routines Available in Aleph

The following fields in **Tab 5** of the Item Form correspond to the following enumeration and chronology captions:

- **Enum-a**: Volume, or highest level of enumeration
- **Enum-b**: Issue Number, or second level enumeration
- **Enum-c**: Part Number, or third level enumeration
- **Chron-i**: Year, or highest level of chronology
- **Chron-j**: Month or season or second level chronology

Here are the sort routines currently available for staff to resort items on the **Items List**

<table>
<thead>
<tr>
<th>Sort Option</th>
<th>Issue Sort Data in Tab 5 of Items Form</th>
<th>No Data in Tab 5 of Items Form</th>
<th>Non-Issue Sort Data in Tab 5 of Items Form</th>
<th>No Data in Tab 5 of Items Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vol./Desc./Library/Collection</td>
<td>Year then Volume, then Part number, then Issue number</td>
<td>Description field, then Barcode Sequence Number</td>
<td>Volume, then Issue Number, then Part Number, then Sublibrary Code, then Collection code</td>
<td>Description Field, Sublibrary code, then Collection code</td>
</tr>
</tbody>
</table>

Revised: September 9, 2008
<table>
<thead>
<tr>
<th>Sort Option</th>
<th>Issue Sort Data in Tab 5 of Items Form</th>
<th>No Data in Tab 5 of Items Form</th>
<th>Non-Issue Sort Data in Tab 5 of Items Form</th>
<th>No Data in Tab 5 of Items Form</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Vol./Desc./Library</strong></td>
<td>Year, then Volume, then Issue Number, then Part Number, then Barcode Sequence Number</td>
<td>Description Field, then Barcode Sequence Number</td>
<td>Volume, then Issue Number, Then Part Number, Then Sublibrary Code, then Collection</td>
<td>Description, then Sublibrary, then Collection</td>
</tr>
<tr>
<td><strong>Vol./Year/Part/Library</strong></td>
<td>Year, then Volume Number, then Issue Number, then Part Number, then Barcode Sequence Number</td>
<td>Description Field, then Barcode Sequence Number</td>
<td>Volume, then Issue Number, then Part Number, then Description, then Sublibrary</td>
<td>Description then Sublibrary Code</td>
</tr>
<tr>
<td><strong>Vol./Year/Part/Library</strong></td>
<td>Holdings record number, then Year, then Volume, then Issue, then Part, the Barcode Sequence Number</td>
<td>Holdings record number, then Description, then Barcode Sequence Number</td>
<td>Volume, then Year, then Issue Number, Then Part Number, then Sublibrary code, then Item Status</td>
<td>Description field, then Sublibrary, then Item Status</td>
</tr>
<tr>
<td><strong>Description/Library/Status</strong></td>
<td>Sublibrary code, then Barcode Sequence Number</td>
<td>Sublibrary code, then Barcode Sequence number</td>
<td>Holdings Record number, then Volume, then Issue Number, then Part Number, then Sublibrary Code then Collection Code</td>
<td>Holdings Record number, the Description Field, Then Sublibrary Code, then Collection Code</td>
</tr>
</tbody>
</table>

Revised: September 9, 2008
### 4.2.5 The Items Tab - The Lower Pane

The Lower Pane of the Items tab contains a 6-tabbed display of information about an item that is highlighted on the **Items List** in the Upper Pane.

#### 4.2.6 Lower Pane Tab 1

**Tab 1** of the Lower Pane shows brief bibliographic information and a display of the item information. This display can be printed by clicking on the pane and pressing the `<Ctrl> + p` keys.

![](Items Tab, Lower Pane, Tab 1: Item Display)

#### 4.2.7 Lower Pane Tab 2

**Tab 2** contains the **General Information (1)**. This is the first tab where you can edit/add information to the item record.

Revised: September 9, 2008
The fields on Tab 2:

- **Barcode**: This field contains the physical barcode number, HD barcode number, or system-generated barcode number.

- **Item Status**: This is the circulation policy for the item. Based on the sublibrary listed in the Sublibrary field, the drop down menu will contain a list of all circulation policies for that sublibrary.

- **Item Process Status**: This field contains a status that temporarily overrides the item’s normal item status. For example, the Item Process Status OR will display the words “On Order” in the public catalog. If the field is blank then the regular circulation status of the item will display based on the value in the Item Status field. **If you are sending an item to the Harvard Depository, you MUST select the HD Item Processing Status.**

- **Sublibrary**: The drop down menu will contain a list of sublibraries here at Harvard. This field will be filled in for you if you link your item to the holdings record in the HOL link field.

- **Collection**: The drop down menu will contain a list of collections that have been set up for your library.

- **Enum. Level.1 (A) (Vol.)**: This field will contain the highest level enumeration data for multiple volume books and serials, such as “1” for v.1. This field is used in sorting criteria. When predicting serial issues, this field will be filled in for you by the system. For items added without prediction, you populate this field yourself.

- **Copy number**: This field can contain copy-specific data.

- **Enum. Level.2 (B)**: This field contains second level enumeration data for serials, e.g. if the enumeration on a serial piece was v.12:no.5, the number 5 would be in this field. This field is used in certain sort routines. When predicting serial issues, this field will be filled in for you by the system. For items added without prediction, you populate this field yourself.

- **Material Type**: This field designates the physical format of the item and is used as a criteria for sorting.

Revised: September 9, 2008
- **HOL Link:** This field contains the link to a holdings record. When an item is linked to a holdings record, the Sublibrary, Collection, Call Number Type and Call Number fields will all be populated with the data found in the holdings record’s 852 field.

- **85X type/Linking Number:** This is used in serial check-in to link an item to the appropriate 853, 854 or 855 pattern field. The first field value is 3, 4, or 5 depending on the pattern that the item is being linked to. The second field value is the 853, 854, or 855 pattern that the item is linked to.

- **Temporary Location:** When this box is checked off, you can select a temporary location for the item. You can change the sublibrary, collection and/or call number fields. When you remove a temporary location from the item and click the Refresh button, the sublibrary, collection, call number type and call number from the holdings record will refresh into the item. In this way, the holdings record serves as the master record for this item.

- **Call Number type:** The drop down menu will contain a list of classification schemes used at Harvard. This field will be filled in for you if you link your item to the holdings record in the HOL link field.

- **Call number:** The call number of the item. This field will be filled in for you if you link your item to the holdings record in the HOL link field.

- **2nd Call Number Type:** This is the place where a classification scheme for a second call number could be put. Harvard policy is that there is only one call number per item, so this field will remain blank.

- **2nd Call Number:** This is the place where a second call number could be put. Harvard policy is that there is only one call number per item, so this field will remain blank.

- **Description:** This field is used for piece level information and displays to the public. For example, if you had a multiple volume work, you would input v.1 in the Description field and this will display in the public catalog.

### 4.2.8 Lower Pane Tab 3

**Tab 3** contains the **General Information (2).** You can add **Remote Storage** information on this tab for items going to the Harvard Depository and specific notes about this item for public and circulation staff display.
The fields on Tab 3:

- **Inventory Number**: Usually left blank; some libraries may add information that can be used in Reporting.
- **Statistic**: Usually left blank; some libraries may add information that can be used in Reporting.
- **Inventory Date**: Usually left blank.
- **Remote Storage ID**: This field is used to flag an item for the Harvard Depository. Select Harvard Depository from the drop down list if you wish to send items to the depository.
- **Last Invent. Report Date**: Usually left blank.
- **Open Date**: Date that Item was created; will be system supplied.
- **Price**: Usually left blank.
- **Update date**: Date that item was last updated; will be system supplied.
- **OPAC Note**: Adding a note to this field will display in the public catalog.
- **Circ Note**: Adding a note to this field will display a note to Circulation Staff when the item is charged or discharged.
- **Internal Note**: Adding a note to this field will be available to internal staff only.
- **Order Number**: If this item was created by an order, or if you have linked a subscription to an order in the case of predicted serials issues, the order number will display in this field. Staff who add items in serials without prediction add the order information to this field using the Subscr Defaults button.

If you wish to manually link an item to an order, click on the arrow to the right of the field. A list of all orders associated with the bib will display. Double click on your order and the order number will be added to the field. If you click on the list box, you will be brought to the Order Index when you can search for your order using a variety of index fields. See the ACQR: Monographs and Standing Order Receipts guide for more information about using the Order index.

- **Invoice Key**: If you pay for an item linked to an order, the invoice number will display in this field.
• **Invoice Note**: If you add a note to an invoice linked to order-created item, that note will display here.

4.2.9 Lower Pane Tab 4

Tab 4 contains **Serial Information** that includes the link to a particular subscription, issue date, expected arrival date and arrival dates.

<table>
<thead>
<tr>
<th>Item Display</th>
<th>General Information (1)</th>
<th>General Information (2)</th>
<th>Serial Information</th>
<th>Serial Levels</th>
<th>HOL Links</th>
</tr>
</thead>
</table>

- **Subscription**: A serial will be linked to a particular subscription number; this number will be added by the system when predicting issues. If one is not predicting, this linkage is handled manually by staff. Use of this field is described in the *SERM: Introduction to the Serials Tab* guide.

- **Pages**: If a periodical has continuous numbering, you can indicate the pages of a particular issue in this field. This field is optional and will NOT display in the public catalog.

- **Description**: The same **Description field** found on Tab 2. If you enter information on the Description Field on Tab 2, the information will automatically populate the Description Field on Tab 4, and vice versa.

- **Issue Date**: This field is used to base the issue date of the periodical. When predicting issues, Aleph will populate this field for you based on the value you input into the subfield $$3$$ of the 853X field in the holdings record. When adding issues one at a time, staff will add information to this field. This process will be discussed in the *SERM: Introduction to the Serial Tab* class.

- **Exp. Arrival Date**: Aleph will calculate the Expected Arrival Date, or “first claim date” of the piece. The system will take the date found in the Issue Date field and add to it the number of days in the Subscription Form’s First Claim field. This process will be discussed in the *SERM: Introduction to the Serial Tab* class.

- **Arrival Date**: When an issue is checked in on the Serials Tab in the Acquisitions/Serials Module, the system will add the arrival date to this field. This process will be discussed in the *SERM: Introduction to the Serial Tab* class.

- **Gap Indicator**: This field is not in use at Harvard.

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4.2.10 Lower Pane Tab 5

Tab 5 contains Serial Levels information that indicates the enumeration and chronology of a multiple volume work. Aleph takes information from these fields and uses them as criteria for sorting. If you are predicting issues, the system will fill in the appropriate fields on this tab for you. If you are checking in issues without prediction or recording the receipt of a multiple volume work, then you fill in these fields yourself.

The fields on Tab 5:

- **Enum.Level.1(A)(Vol):** Used for recording the highest level of enumeration for a serial or multiple volume work. This is the same field found on Tab 2. If you enter information on Tab 2, the information will automatically populate the field on Tab 5 and vice versa.

- **Chron.Level.1(I)(Year):** Used for recording the highest level of chronology for a serial or multiple volume work. This is the same field found on Tab 2. If you enter information on Tab 2, the information will automatically populate the field on Tab 5 and vice versa.

- **Enum.Level.2 (B):** Used for recording the second level of enumeration for a serial or multiple volume work.

- **Chron. Level.2(J):** Used for recording the second level of chronology for a serial or multiple volume work.

- **Enum.Level.3 (C):** Used for recording the third level of enumeration for a serial or multiple volume work.

- **Chron.Level.3 (K):** Used for recording the third level of chronology for a serial or multiple volume work.

- **Enum.Level.4 (D):** Used for recording the fourth level of enumeration for a serial or multiple volume work.

- **Chron.Level.4 (L):** Used for recording the fourth level of chronology for a serial or multiple volume work.

- **Enum.Level.5 (E):** Used for recording the fifth level of enumeration for a serial or multiple volume work.

Revised: September 9, 2008
- **Enum.Level.6 (F)**: Used for recording the sixth level of enumeration for a serial or multiple volume work.
- **Alt.Enum.1 (G)**: Used for recording the highest alternate enumeration for a serial or multiple volume work.
- **Alt.Chron.(M)**: Used for recording the highest alternate chronology for a serial or multiple volume work.
- **Alt.Enum.2 (H)**: Used for recording the second alternate enumeration for a serial or multiple volume work.
- **Supp.Index (O)**: Used for recording the title of a supplement or index.

### 4.2.11 Lower Pane Buttons, Tab 2-5

To the right of tabs 2-5 are a set of buttons:

- **Add/Update**: Add will appear if adding a new button, update will appear if editing an existing button.
- **Save Defaults**: This button will allow you to save values in the item record so you don’t have to type them over and over when you create new items. See section […] for more information.
- **Refresh**: This button will refresh item data after you add a holdings record in the HOL Link field.
- **Subscr Defaults**: This button will add data from a library’s subscription record when you link an item to a Subscription on Tab 4 of the Item Form. See the SERM: Introduction to the Serials Tab guide for more information on how to use this button.
- **Cancel**: This button will cancel the creation of an item if pressed before pressing the Add button.

### 4.2.12 Lower Pane Tab 6

**Tab 6** is the **HOL Links** tab that allows you to link and unlink items to a holdings record.
The buttons on Tab 6:

- **Edit:** This will open up the Records Tab in the Cataloging Module and allow you to edit the holdings record that you have highlighted on the list.

- **Create New:** This will create a new holdings record for you. A holdings record number will be added to the list and your item will be linked to it (you will see the red checkmark next to the item). Click Edit to then add sublibrary, collection and call number information to your newly-created holdings record (see section 8.5.6 for more information).

- **Link:** This button will allow you to link an item to a holdings record. Note that you must have authorization in your login to do this.

- **Unlink:** This button allows you to unlink an item from a holdings record. Note that you must have authorization in your login to do this.

5. Other Roots and Nodes on the Items Tab

5.1 **All Items History Node**

Beneath the Item List Root on the Navigation Pane is the All Items History Node. This node will display information about Loans, Holds and All Items History about all of the items on the Items List. Access the node by clicking on it from the Navigation Pane or pressing the <Ctrl> + <Alt> + A keys. A three-tabbed display will appear to the right of the Navigation Pane.

The Loans Tab will display information about any of the items that are out on loan.

Revised: September 9, 2008
The **Hold Requests Tab** will display information about any items that currently have a hold request.

History of loan data for all items will appear.

Current loans do NOT appear on this list—check Item List to see if an item is currently out on loan.
All Items History Node: Hold Requests Tab

The Item Changes Tab will display change information about all items based on item barcode sequence number. You can view deleted items from this screen by clicking on the view button (or, with the pane in focus, press the <Alt> + V keys).
5.2 **Item Root**

Beneath the **All Items History Node** on the Navigation Pane is the **Item Root**. You can access the Root by clicking on it on the Navigation Pane or pressing the `<Ctrl> + <Alt> + I` keys. The **Item Root** displays information about the item that is highlighted in the Upper Pane. It will display the barcode number in parenthesis next to the word Item on the Navigation Pane.

If you click on the Item Root, you will see a view of the item information.
Item Root selected.

Next to the word Item, in parenthesis, is the barcode and call number of the item that is currently highlighted on the Item List.

To select a different item, you would have to click back to the Item List and click on another item on the Item List.

Beneath the Item Root are two nodes, the **History Node** and the **Circ Summary Node**.

**The History Node:** Next to the words History Node on the Navigation Pane is a display that will list the last status date made to the item. You can access the History Node by clicking on it from the Navigation Pane or pressing the <Ctrl> + <Alt> + H keys. The Node will open up to 3-tabs to the right of the Navigation Pane. You will see the number of Loans, Holds and All Items History about this item on each of the tabs.
The Circ Summary Node: You can access the Circ Summary Node by clicking on it on the Navigation Pane or pressing the <Ctrl> + <Alt> S keys. The Node will open to a 2-tabbed display to the right of the Navigation Pane.

Tab 1 will provide you with the latest circulation status of the item.

Tab 2 will show you circulation history. You can also set date parameters for this history.
5.3 **Objects List**

The Objects List is associated with the Aleph Digital Assets Module, which is not currently in use at Harvard. You will see no records associated with the Objects List in the Item Tab.

5.4 **Object**

This root is also associated with the Aleph Digital Assets Module and you will not see any records associated with the root in the Items Tab.

5.5 **Bibliographic Info Root**

You can access the Bibliographic Root by clicking on it on the Navigation Pane or pressing the <Ctrl> + <Alt> + B keys. You will see a display of bibliographic record information associated with the item in this display.
5.6 **Triggers Root**

Triggers are not being used at Harvard at this time.

6. **Barcoding Monographs for the Stacks and HD**

As we have seen in our review of the Item Record, there are only small changes that need to be made in order to physically-barcode it for the stacks. The Item Record will normally have been created either at the time of ordering, receipt, or cataloging, and most of its fields—including the Link to Holdings should already have been filled out.

At minimum, the Aleph system-supplied barcode will have to be replaced by a physical barcode, and the rest of the information in the Item Record will need to be reviewed. Potentially the Item Status and Item Processing Status codes may need to be changed, and Notes may need to be added to the fields on Tab 3, depending on the item, and on local library practice. Depending on the policy of your library, you may or may not be authorized to update some of these fields.

6.1 **Updating an Item Record to be placed in the Stacks**

In this example, a monograph title has been ordered and received by the library. The piece has just come from Cataloging, where a holdings record and a call number have been added to the piece. The piece now needs a physical barcode added to it and a review of the circulation policy to make sure it is correct.

1. Search for your item and bring it up in the Item Tab. Make sure the item is highlighted in the Upper Pane of the Item List.

2. On the Lower Pane, Tab 2, wand in a standard Harvard 14-digit stacks barcode in the Barcode field, replacing the system-generated barcode.

3. Check the Item Status for your piece. Item Status denotes the circulation policy for this item. Make sure it is correct. If it is not correct, then choose the appropriate status from the drop down list. Also check the Material Type field to make sure that it is the correct physical format for the piece. If Material Type is not correct, then choose the appropriate type from the drop down list.

4. Remove the Item Processing Status of RE-Ordered-Received, if it has not already been removed by your Cataloging Department. We need to remove this status so that the circulation policy will be the status that the patron will see in the public catalog.

5. If you are working with a multiple volume monograph, add the appropriate volume number in the Enum.Level.1(A)(Vol) field, if it has not been added by your Cataloging Department. This will add sorting criteria to your piece.

6. If you are working with a multiple volume monograph, add the volume number with its caption (e.g. v.1) in the Description Field, if it has not been added by your Cataloging Department. The contents of this field displays to the public and provide piece-level information.

Revised: September 9, 2008
If you wish to add Note information to this item, you need to do this on Tab 3:

- To add a note for the public about this particular item, add this information to the OPAC Note field.
- To add a note for Circulation Staff to see when charging or discharging the item, add this information to the Circ Note field.
- To add a note for internal staff, add this to the Internal Note field.

Updated Tab 3

In the case of a monograph, you do not have to update anything on Tabs 4-5. Since our item is already linked to a holdings record, we do not need to look at Tab 6 (to create a holdings record from items, see section 9.3).

7. After making all of your changes, click the Update button to update your item record. Your updated item will appear on the Items List in the Upper Pane.

Updated Items List

Revised: September 9, 2008
8. In the case of a multiple volume monograph, follow steps to duplicate and edit items found in section […] of this guide.

If the book is also plated and tagged at this point in your library’s workflow, then End-Processing has been completed for this book. However, if it is to go to another office for plating and tagging, or if it needs to be sent off-site for binding, the barcoded volume now needs to be charged to a pseudo-patron ID or have its Item Processing Status changed by the Item Process Status utility, which we will cover later in section […].

6.2 Barcoding a Monograph for the Harvard Depository (Remote Storage)

Processing a monograph for the Harvard Depository (HD) is only slightly more complicated than processing it for the stacks.

1. Search and retrieve your title in the Items Tab.

2. Highlight the item you wish to send to the Depository from the Items List. The item record information for this item will be displaying in the Lower Pane.

3. Click to Tab 2, General Information (1). In the Barcode field, replace the system-supplied barcode or the Harvard stacks barcode with a physical HD barcode.

4. Review the Description field, Enum.Level.1(A)(Vol) and Material Type, fields to verify that they are correct and do not have to be changed.

5. Make sure that the appropriate Item Status is set for your item. In the case of HD materials, there are three item statuses that you can assign:

   ▪ **01 (Regular Loan):** Patron can request item from the Depository and the item can circulate. The status in the public catalog will read “Regular Loan (depository)”

   ▪ **02 (In Library Use):** Patron can request item from the Depository and the item can only be used in the library. The status in the public catalog will read “For use in ... a specific library location.”

   ▪ **92 (Ask at Circulation Desk):** Patron can not request item and item can not circulate. The words “Ask at Circulation Desk” will appear in the public catalog as the circulation policy for the piece.

Note that these three statuses are the most common statuses applied to HD items. Your library may use a different status number for depository items; for example, some libraries use 28, for 28-day loan instead of Regular Loan for a regular circulating item. Check with your supervisor to confirm the appropriate statuses for HD items in your library.

6. From the Item Processing Status field, select HD-Harvard Depository from the drop down list. This field is required for all items being sent to the Harvard Depository.

Revised: September 9, 2008
7. Click to **Tab 3, General Information (2)**, and select **HDEP** from the **Remote Storage** field. **This field is required for all items being sent to the Harvard Depository.**

8. Click **Update** to save your changes. Your item will appear in the Items List.

**Tip to add HD information in one step:** Actually, strictly speaking, you only need to change one field—the **Remote Storage field on Tab 3**—because if you change this field to “HDEP” and click on the **Refresh** button, it will update the Item Process Status on Tab 1 to “HD” automatically.

### 6.2.1 Changing the Collection Field to HD on the Holdings Record

In some workflows, there will be one additional step that needs to be performed at this point to process the book for the Harvard Depository, which is to add a subfield $S$c collection designation for Harvard Depository to the 852 field in the Holding Record. In some libraries this may be done by the cataloger.

**Revised: September 9, 2008**
To edit the Holdings Record:

1. Make sure your item is highlighted in the **Items List**. On the Lower Pane, click on **Tab 6, HOL Links**, or, put the Lower Pane into focus and hit the <AtI> + 6 keys. You will see a display of holdings records associated with your title. You will see a red checkmark next to the holdings record to which your item is currently linked.

   ![HOL Links Tab](image1)

   **HOL Links Tab**

2. Make sure your library’s holdings is highlighted and click the **Edit** button. This will open up the **Records Tab** and the **holdings record** will display in the Upper Pane.

   ![Records Tab](image2)

   **Records Tab, Holdings Record Displays in Upper Pane**

Revised: September 9, 2008
3. Review the 852 field. If there is already a subfield c, as would generally be the case, replace the text in the subfield c with “HD”.

4. After you change the text, you must save your changes to the server. Click on the Save on Server and Local Drive icon, found at the top right of the Cataloging Module.

**Note:** After updating your holdings record, you will see that the revised collection information has been added automatically to your item. To see this, double-click on the item in the Record Manager pane to bring up the Items List in the Items Tab. You will see that your item now contains the updated collection information. Aleph will do this for any 852 fields you change in the holdings record (sublibrary, collection or call number). Aleph will also change all of the items, if you are working with a multiple volume set or serial issues, at the same time.

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### 7. Creating Item Records

In most cases, item record creation will happen outside of the Items Tab.

- **For monographs**, an item is created when an order is created on the Order Tab in Acquisitions.

- **For Standing Orders**, items are created for each piece received on the Order in the Order Tab in Acquisitions, if the library wishes to circulate materials that come with the standing order (not all standing orders require items; some standing order records are used as payment records only).

- **For serials**, predicted items are created based on the publication pattern of the piece found in the holdings record and the subscription record in the Serial Tab. For non-predicted items, items are added one at a time in the Serial Tab by staff.

- **For books that do not have a barcode but can circulate**, Circulation staff can create a bibliographic record and an item record “on the fly” for these types of materials.

The most common case where you will create an item in the Items Tab is to record a gift, or to send previously unbarcoded volumes to the Harvard Depository. For the purposes of this
demonstration, we will create an item for a 2 volume set that we received as a gift. We will create the item for volume 1 and then duplicate the item for volume 2.

To create an item in the Items Tab:

1. From the Upper Pane, click New or type <Alt> + N. The Upper Pane will turn gray and the Lower Pane will open to Tab 2, General Information (1), where you can start entering item data.

   Clicking the New button results in a new item record form

2. Fill in the following fields on Tab 2:

   - **Barcode**: Scan in a barcode. If you do not have a barcode, or you are sending the piece to end processing, you can leave this field blank and the system will fill in a barcode on the record.

   - **Material Type**: Select the appropriate material type for this item. In this example, BOOK will be chosen.

   - **Item Status**: Select the appropriate circulation policy for this item. In this example, 01, Regular Loan, will be chosen.

   - **HOL Link**: Select the correct holdings record for this item.
- **Enum.Level.1(A)(Vol)**: Since this is a multiple volume set, the number 1 will be added to this field to signify that this is the item record for v.1
- **Description**: v.1 will be added here. This information will display to the public.

If this was not a multiple volume work, you would leave **Enum.Level.1(A)(Vol)** and the **Description** fields blank.

**Optional**: In addition to the fields above, you could also fill in the following fields based on the information you have about the piece:

- **Copy number**: if this is multiple copy, you can add the copy number in the Copy number field.
- **Item Processing Status**: If you are sending the piece to the bindery (note: this depends on local library policy; check with your supervisor), or sending it to the Harvard Depository, you would choose the appropriate Item Processing Status for the list. See section 5.2 for instructions on sending a piece to the Depository.
- **Temporary Location**: See instructions about temporary location after step 3 below.

### Tab 2 Fields Filled In

3. Click the **Refresh** button. The following fields will be filled in by the system:

- **Call Number Type**: The 852 first indicator value from the holdings record will be filled in for you.
- **Sublibrary**: The sublibrary code from 852 $$b$$ of the holdings record will be filled in for you.
- **Call Number Type**: The 852 first indicator value from the holdings record will be filled in for you.
- **Collection**: The collection code from the 852 subfield $$c$$ of the holdings record will be filled in for you.
- **Call Number**: The call number from the 852 subfields $$2$$, $$h$$ and $$i$$ (if present) from the holdings record will be filled in for you.

Revised:  \text{September 9, 2008}
Note that if you did not scan in a barcode, the system will add a barcode number to the **Barcode field** for you.

### Item Form Tab 2 Refreshed

**Temporary Location**: If you wish the piece to be located at a temporary location, click on the Temporary Location box and change the appropriate sublibrary and/or collection and/or call number fields.

4. **Click to Tab 3**

**Tab 3** has no required fields unless you are sending a piece to the Harvard Depository (see section 5.2). There are some optional fields you may wish to fill in on this tab:

- **OPAC Note**: If there is something about this item that you wish the public to know, you can add a note to this field and it will display in the public catalog. Note that this is a public note about this specific item only; not about the title generally.
- **Circ Note**: If there is something about this item that Circulation Staff need to know or check, you can add a note to this field and the note will display to the Circulation Staff when they are charging or discharging the item.
- **Internal Note**: This is a note intended for internal staff only.

Revised: September 9, 2008
Tab 4: Since this is a monograph, you will not need to fill in anything on Tab 4. You will note that the Description field is filled in with v.1, which you added to Tab 2. Details on filling in this Tab will be provided in the *SERM: Introduction to the Serials Tab* class.

Tab 5: If you click on Tab 5, you will see that the number 1 has been added to the **Enum.Level.1(A)(Vol)** field on this tab, so you do not have to enter it again. Details on other fields that could be filled in on this tab will be provided in the *SERM: Introduction to the Serials Tab* class.
5. Click the **Add** button (or press <Alt>+A) to add the item. The Item Record will now display in the Upper Pane.

### 7.1 Saving Item Defaults

If you are processing a number of items, it is possible to save certain fields on the Item Record as defaults so that you do not have to fill them in again. Fields such as **Material Type** and **Item Status** and **Note** fields can be saved as defaults.

To save defaults:

1. **Click New** to create a new item

2. Select the fields you wish to save as defaults such as Material Type and Item Status

Revised: September 9, 2008
Note that you should not include a link to holdings unless you intend to use this for a large multiple volume set AND you intend to clear defaults after all of the volumes have been added.

3. Click the **Save Defaults** button (or press <Alt>+V). The system will ask if you wish to save defaults, click **Yes**. Whenever a new item is created, the defaults will automatically populate the item record.

**To Clear Item Defaults:** From the **Main Menu**, select **Items > Delete Item Defaults**.

### 7.2 Duplicating an Item

When working with multiple volume sets, it is possible to duplicate an item and then edit it as you create item records for the volumes in your set.

To duplicate an Item:

1. From the **Items List** on the Upper Pane, highlight the item you wish to duplicate and click the **Duplicate** button on the right (or press the <Alt>+P keys).

2. The duplicated item record will open in the Lower Pane. Edit the **Enum.Level.1(A)(Vol)** and **Description Fields** to indicate the correct volume number.

3. Click the **Add** button (or press the <Alt>+A keys).

### 7.3 Deleting Items

1. To delete one item in Aleph, highlight the item on the Items List and click the **Delete** button.

2. Aleph will ask you to confirm, click **Yes** if you have selected the correct item.

**To delete multiple items:**

1. Highlight the first item you wish to delete

2. Hold down the <Shift> key on your keyboard

3. Highlight the last item you wish to delete.

Selecting a range of items to delete

Revised: September 9, 2008
4. Click the Delete button

5. Aleph will ask if you are sure, if you are, click yes

The items will be deleted

If you wish to delete selected items from the Items List

1. Highlight the first item you wish to delete

2. Hold down the <Ctrl> key on your keyboard

3. Select the items you wish to delete

4. Click the Delete button

5. Aleph will ask if you are sure, if you are, click yes

The items will be deleted

7.3.1 Notes about Deleting Items

- Note that you must have authorization in your logon to delete items

- Note that if an item is on loan, you will not be able to delete the item

- Note that if you delete an item, you will lose all of its loan history

- Note that delete is a permanent process in Aleph. Once you delete one or more items, you cannot get them back. You will have to manually recreate any item mistakenly deleted. You will not be able to get loan history for the deleted item(s).
8. Creating A Serial Item in the Item Tab

Most serial titles are created and maintained in the Acquisitions/Serial Module Serial Tab. See the SERM Guide and the SERP guide for information on how to process brand new and currently received serial issues.

Many libraries never barcoded their older, bound journal collections. Since most libraries do not circulate periodicals, a barcode was not required. As collections grow and more library stack space is needed for new titles, many libraries have opted to send older bound periodical volumes to remote storage. In order to send materials to the Harvard Depository, an item record must be created that includes a barcode. These volumes also require a barcode so that the item can be circulated to Google for digital scanning.

When creating a serial item in the Item Tab, users must be aware of the Material Type for serial items and its impact on public display—see section 8.3 for details.

8.1 Recommended Column Settings for Working with Serials in the Items Tab

Users should add the following two columns to the Items List before adding bound serial items in the Items Tab:

- Expected Arrival Date
- Arrival Date

To add these columns:

1. Point your mouse to any column on the Items List and right-click on the column with your mouse. A Header configuration box will appear on your screen.
2. Check off the boxes next to Expected Arrival Date and Arrival Date fields
3. Click OK

Aleph will add these fields to your column list.

8.2 Adding a Bound Serial Item for Remote Storage in the Item Tab

To create a new serial item for remote storage in the Item Tab:

1. Search and retrieve your title in the Item Tab.
2. Click the New button. The Lower Pane will open to Tab 2.
3. In the barcode field, add the barcode
4. Add Material Type ISSBD for bound volume.
5. Click on the HOL link field and add the holding link.

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6. Add volume and year designation in the **Description** field.

7. Add the **Item Status**. For most libraries, this will be 02, In-Library Use

8. Add Enumeration in the **Enum. Level 1 (A) (Vol.)** field. If necessary add secondary enumeration (e.g. issues numbers), to **Enum.Level.2 (B)**; otherwise, leave blank.

9. Click Refresh. The **Sublibrary, Collection, and call number** information will come into the item.

10. Click to **Tab 3**.

11. Optional: Add notes to appropriate note fields

12. Click to **Tab 4**. The description field will be checked in.
13. Click to Tab 5. The **Enum.Level.1(A)(Vol)** field will be filled in with the volume designation you provided on Tab 2. Add any other numeric and chronological information. Add Year in the **Chron. Level.1(I) (year) Field**; add month or season to **Chron Level.2 (J)** field if necessary.

14. Click the **Add** button to add the item.

### 8.3 Expected Arrival Date Added to item

When bound serial items are added, users must be aware that Aleph is going to add today’s date to the Issue Date and Arrival Date fields on Tab 4 of the Item Form: This is because the material type of the item is a serial-type, that is, the material type field of the item has been defined with a value beginning with the letters “ISS”.

Since you have added the Expected Arrival Date and Arrival Date columns to the Items List, you will see this in the Item List display after you have added the item:
Expected Arrival Date added to Serial Bound Volume after Item is added

Note that Aleph will add this value AFTER the item is added, and not before.

To resolve this issue, you have 3 choices:

1. When you are creating the item, add today’s date to the Issue Date, Expected Arrival Date or Arrival Date fields on tab 4 before you add the item

2. Optionally, add today’s date in the Arrival Date field on Tab 4 AFTER the item is added and click Update to add the change.

3. Optionally, click to Tab 4 and use the F12 key to zero out the dates in the Issue Date and the Arrival Date fields and click Update to add the change.

8.1 Using the Duplicate button for New Serial Items

If you then decide to add the remaining volumes of the serial title by using duplicate, the Arrival Date field will need to be filled in on each item. The recommended workflow:

1. Highlight first created item on Item List and click Duplicate

2. On Tab 2, add new volume and year designation to Description field

3. On Tab 2, add new volume designation to Enum.Level.1(A)(Vol) field

4. Click to Tab 4

5. Add today’s date to Arrival Date field

6. Click to Tab 5

7. Add correct year designation to Chron.Level.1(I) field

8. Click Add to add issue

Revised: September 9, 2008
9. Printing Spine Labels in Aleph

9.1 Printing an Individual Spine Label

An individual spine label can be printed from the Item List, provided that you have access to a printer that can print it on the appropriate media, and that your library has already configured the spine label display.

To print an individual spine label:

1. From the Item List, click on the desired Item Record and click the Label button.

If your Aleph session is set to Print Preview the spine label will appear on your screen first in preview mode. If it is set to Normal Printing, the spine label will be printed directly.

To change from Normal Printing to Preview (or vice versa), click on the Print Configuration icon in lower right corner of the screen and select the appropriate choice.
We can now see the Print Preview screen of the spine label. The spine label will be laid out according to the configuration set up by the library. Note that in our example the label may be different from what your library has configured for your spine labels.

Individual Spine Label

At this time the spine label may be printed if the workstation has access to a printer that may print on the appropriate label media.

9.2 Batch-Printing Spine Labels

A document has been developed for the printing of labels in batch in Aleph. Please see *Printing Labels in Aleph*, located at the Harvard-Aleph Documentation Web Site at: http://hul.harvard.edu/ois/systems/aleph/docs/printing_labels.pdf.

At this point, we are unable to produce labels which can be printed without further manipulation outside of Aleph. We hope to have a better system for labels in the near future.

In the meantime, here is one way to produce spine labels from the Items Module:

1. Right-click on the printer icon located on the lower right hand corner of the Aleph screen.

2. Choose **Preview** from the printer configuration menu

3. Click on **Items** in the top menu bar of the Cataloging Module. Choose **Print Item Labels** from the menu.

Print Item Labels Box

Revised: September 9, 2008
4. Wand in or key in the Barcode of the first item in the **Enter Item Barcode box**.

5. Then click on the **Add** button, or hit the <Enter> key. This will add the barcode to the Barcode window at the top. Up to 99 barcodes may be entered on this list at one time. Any barcode that has been input by mistake may be removed using the **Delete** button. (The **Clear** button will remove all barcodes from the list.)

6. When all desired barcodes have been entered, click on the **Print** button. As with the individual spine label, if your Aleph session is set to Normal Printing, the spine labels will be printed; if it is set to **Preview**, the list of spine labels will appear on your screen.

7. Press the **Ctrl + A** keys to select all text.

8. Press **Ctrl + C** to copy all text

9. Open a text editor such as **Notepad** [outside of Aleph] and press Ctrl + V to paste in label text.

   If you use strip labels, you can print directly from Notepad. If you use full sheet label stock, import the text file into another application (Word, LabelMaker, Excel, etc.) and reformat to produce labels.

   **Note:** The current process is adding extra returns when copying into Notepad. Pasting into Excel first, then copying again and pasting into Notepad removes the extra returns.

   OIS will keep staff updated on improvements to the label function. Please share any methods you develop locally with your colleagues and with staff in OIS.

Revised: September 9, 2008
10. Items in the Acquisitions/Serials Module

Though most of the work in editing item records will happen in the Cataloging Module, it is possible to work with Items in the Acquisitions/Serials Module. The module will allow you to view and edit item records for Order Records and for Serials titles.

10.1 Move title from Items Tab to Order Tab in Acquisitions/Serials

1. Click on the Overview Node or press the <Ctrl> + <Tab> + 2 keys. The Overview Node will open, and a display similar to the Navigation Tree will appear on the screen.

2. Click on the Order Tab button (or press the <Alt> + R keys) to move the title from the Items Tab to the Order Tab in Acquisitions.

10.2 Reviewing/Editing Item Information Associated with an Order

When the Order tab opens, the Order List will display in the Upper Pane.

![Acquisitions/Serials Module, Order Tab, Order List](image)

Revised: September 9, 2008
To see Item information associated with a monograph or standing order:

1. Highlight the **Order** you want to see in the Upper Pane

2. On the Navigation Pane, you will see the **Order Root** indicates the Order that is highlighted in the Upper Pane.

3. Click on the **Items/Subscription Node**, or press the Ctrl + Alt + I keys to open up the node.

Here you will see the item belonging to the Order identified in the Order Root.

You will only see items associated with a particular order on this node, not all items for all libraries.

4. The **Items List** of the item(s) associated with the order will display in the Upper Pane, and the six tabs you see in the **Items Tab** in the Cataloging Module will display in the Lower Pane.

If you wish to edit an item from here, click in the Lower Pane or use the <Shift> + Tab keys to highlight the Lower Pane. Use the <Alt> + tab number keys to navigate within the tabs in the Lower Pane. Edit the field or fields and click the Update button (or press <Alt> + U) to save your changes.

Revised: September 9, 2008
10.3 Creating a Holdings Record from an Item

As mentioned earlier, there may be times when an item record is in existence before a holdings record exists for the title. This is especially true in the case of monographs, where an item record is created at the point of order before the material is received. Here is a workflow you can use to catalog these items when after they are received.

1. When you open an item in the **Items/Subscription Node**, you can see whether or not it has a holding by looking at the **HOL Link field** on tab 2: as you can see, there is no holdings record (there is no HOL no in the HOL column). To add a holdings record from this screen:

   ![HOL Link field empty](image)

   **Items/Subscriptions Node**

2. Click on **Tab 6**, the **HOL Links Tab** on the Lower Pane. A **List of Holdings Records** box displays on the screen. You will see a list of holdings that have been created for this title. You will notice that there is no holdings record for the library that owns this particular item (i.e., there is no holdings record for the Lamont item).
3. To add a **holdings record** for Lamont, click the **Create New** button. This will create a holdings record for the Lamont library and link the item to it. The sublibrary and collection information for Lamont will appear in the List of Holdings Records Window.

4. You **must** now edit this **holdings record** in order to add call number information and the cataloging status (H08) field. To do this, click on the **Edit** button. This will open up the **Records Tab** and the **holdings record** will display on your screen.

5. Edit the **Holdings Record** by adding call number and H08 information as instructed in the CATB Learner’s Guide. If you are creating holdings for a multipart set, add appropriate 853/863 data.

6. Save your holdings record to the server

Revised: September 9, 2008
10.4 Working with Items in the Serial Tab in Acquisitions

In the Serial Tab, it is possible to work with items for serials titles and with items for all material types.

10.4.1 Searching by Barcode Using the Serials Bar

It is possible to search for an item by barcode using the Serial Bar located at the top of the Acquisitions/Serials Module.

Barcode Search Using the Serials Bar

1. Select Barcode from the drop down menu
2. Scan or type in the barcode and click the blue arrow or hit the <Enter> key.

When the Serial Tab opens, the Check-In List will display on the screen.

10.4.2 How to View Items on the Serial Tab – Items on the Check-in List

The check-in list will display serial items that are arrived and not yet arrived. This display is configured so that only serial items belonging to your library can be viewed on this screen.
Here you see a display of serial items that have arrived and not yet arrived. You will only see items belonging to your library.

You will only see items that have a serial material type on this list, i.e., the Material Type field begins with the letters ISS-

Serial Tab, Check-In List

The purpose of the check-in list is to arrive periodical items. To process serial issues, see the SERM and SERP guides.

Note that in addition to only being able to see your library’s items on this screen, you will also only see those items that have a serial material type – that is, the Material Type field begins with the letters ISS-. This means that you will NOT see items with material type BOOK, CD-ROM, etc. on this screen.

10.4.3 View Items on Serial Tab – View All Items, Libraries, Material Types

If you wish to see all items for all libraries associated with a title:

Click on the Items List Root (or press the <Ctrl> + <Alt> + M keys). This will bring you to a display of the Items List in the Upper Pane and the six tab display of item information you see in the Items Tab in Cataloging.

Revised: September 9, 2008
Here you will see a display of all items from all libraries, just like on the Item Tab in Cataloging.

You will be able to see all items with all material types

If you wish to edit an item from here, click in the Lower Pane or use the Shift + Tab keys to highlight the Lower Pane. Use the Alt + tab number keys to navigate within the tabs in the Lower Pane. Edit the field or fields and click the Update button (or press Alt + U) to save your changes.

Along with the Items List Root, you have the same All Item History, Item root, History Node and Circ Summary Nodes that are available to you in the Items Tab in Cataloging. In the Serial Tab, you also have the option of looking at any serial claim that has been processed for a particular issue.

10.4.4 View Items in the Serial Tab – View Items per Subscription

The other view of serials is by subscription. If you wish to see only the items associated with a particular subscription:

1. Select the Subscription List Root or press the <Ctrl> + <Alt> + L keys on your keyboard. The Subscription List will display in the Upper Pane.
2. Highlight the subscription in the Upper Pane. The Subscription Root on the Navigation Pane will indicate the Subscription Sequence Number and the call number associated with the Subscription.

3. Under the Subscription Root, there is a node called Items. This node will indicate how many items are associated with the subscription highlighted in the Subscription List.

4. Click on the Items Node (or press the Ctrl + Alt + I keys), to open the Items List in the Upper Pane and the six-tab display that you see in the Lower Pane in the Items Tab.
Seeing items associated with a subscription:
1. Click on Subscription List and highlight your library’s subscription.
2. Then, click on Items Node under Subscription Root. You will see only the items that have been linked to the library’s subscription on this display.

The link to the subscription is found on Tab 4 of the Item form.

Using the **Items Node** under the **Subscription root** means that you will only see those items that are linked to this subscription. You will not see any items for your library that are NOT linked to the Subscription. This means that, for bound volumes that were converted from our legacy system into Aleph in July 2002 may not appear on this screen.

This view of items associated with a particular subscription can be useful if you wish to merge a set of serials issues for binding. Using the **Bind/Change** button here will only bring up the Items associated with this subscription and make it easier to select and merge items.

### 10.5 Merging Item Records for Bound Volumes and Editing Holdings Records

Once you have received a full volume of issues, the title can be called up for binding. The process of merging items will be used when a set of pulled issues are sent to the bindery. To do this:

1. From the Items Node under the Subscription Root, highlight the first issue you wish to bind in the **Items List** and click on the **Bind/Change** button on the right hand side of the **Items List**. The **Bind/Change** Window will open.
The item records associated with your sublibrary will appear on the left hand side of the list.

2. Click on the first issue and click on the right arrow button to move the issue into the left hand side of the screen. Repeat this process for all of the issues.

**Tip for moving more than one issue**: You can also highlight the first issue, hold your finger down on the <Shift> key, highlight the last issue you wish to bind, and move all of the issue to the right hand side of the screen all at once.

If you inadvertently select the wrong issue, you can simply click on it in the right hand window and click on the left button to return to the left hand side of the Bind/Change List. If you move a bound volume or an issue that is claimed or not arrived, the system will tell you that something is already bound or not yet arrived when you click on the *Bind* button.
3. Click on the **Bind** button. This will open up the item record for the first issue selected. If all issues had not yet arrived and/or had been claimed, the system would have given you an error message.

4. On **Tab 5** of the item, **delete or edit** the issue number in **Enum Level 2** and Chron. Level 2, if applicable. This depends on whether or not you are binding half years.

Remove or edit second level enumeration and chronology from tab 5

5. On **Tab 2**: If you have had the issues at a Temporary Location and will be sending the volume to a permanent location, uncheck the Temporary Location box so that the permanent location will be set in the Item Record.

6. Delete the Description field. Aleph will create it for you when you click Update.

Item Tab 2-Modifications for a Bound Volume

Revised: September 9, 2008
7. Click **Update** to save the changes.

You will return to the **Items List**. Note that you only have an item for your bound volume; all of the other Items have been deleted.

Note that once you press the **Update** button, the issues will be deleted and there is no way to restore them.

Note also that Aleph adds the **Item Processing Status** of **BD**, which displays in the status field as **At Bindery**. **If you do not wish to have this item status, remove the BD status from Tab 2 in the Lower Pane and click the Update button to save your changes.**

### 9.5.1 Updating the Holdings Record with Bound Holdings Data

If you wish to add bound volumes to the **Holdings Record** from the **Serial Tab**.

1. From the **Items List**, click on **Tab 6, HOL Links**. You will see the holdings list with your library's holdings.

2. Click on the **Edit button** to open the **Cataloging Module**. The **Records Tab** will open and the holdings record will display in the Upper Pane.

If you wish to update an existing 863 field, simply add the volume and year.

Revised: September 9, 2008
10.6 Adding an 863 Field using the Create 86X Function

1. Type F6 to create a new MARC tag

2. Give the tag the value of S63.

3. Position the cursor to follow subfield $$a$$. 

4. Type in the volume number of the item you wish to create.

5. Select the Edit..Fix Record menu. A dialog box will appear.

6. Select Create 86X Function from the menu and click OK.

7. Aleph will create an 863 field with the correct values from the bound item record.

8. Save the record to the server.

Use of S63 field to Create 863 field

Revised: September 9, 2008
Once you add the S63 field to the record, you will not need to change or add values to it to update the 863. The subfield $S9 value, set to Y, allows Aleph to update this volume next year.

**To add the next year's volume:**

1. After you bind next year's volume, open the holdings record and choose the Edit…Fix record menu.
2. Highlight Create 86X field
3. Click OK

The volume will be added to the 863.

Next year, just choose Edit…Fix Record from menu to add volume

If you are processing a gap, see the SERP Learner’s Guide, section 15.

4. Save your changes to the Server.
11. Items in the Circulation Module

The **Circulation Module** is used to charge and discharge items for circulation.

Staff that charge bindery items out to a bindery pseudo patron will still use this module for this purpose.

It is not possible to edit item records in the **Circulation Module**, however, the module does provide a means to access the **Items Tab** in **Cataloging** in order for staff to edit items records:

If you want to edit an item record that is displaying within the Circulation module, go to the Circulation Item tab (you can click on it or press the F6 key), select the item, and click the **Edit Item** button (or press Alt i).

The **Cataloging Module** will open and the Cataloging Module's Items Tab will display on the screen.

Revised: September 9, 2008
11.1 Tracking Status for Binding and End-Processing

11.1.1 Charging to a Pseudo-Patron ID

To charge monograph and serial volumes to a pseudo-patron ID:

1. Click on the Loan Tab, the first tab in the Circulation Module, or hit the F5 key.

2. Wand in or type the pseudo-patron ID in the Patron Bar at the top left of the screen, and click on the Blue Arrow or hit the <Enter> key. This will register the Pseudo-Patron ID, and the Pseudo-Patron ID name will appear next to the Blue Arrow.

3. Wand in the barcode for the first item to be charged to the Pseudo-Patron ID into the second box on the upper right of the screen, the Item Bar, and click the Blue Arrow or hit the <Enter> key.
The item information will now appear in the loan session box at the bottom of the screen.

If you are sending many books to the bindery, you may now wand in a new barcode in the Item field. You can repeat the process as many times as is necessary for the items that you have to be charged to that pseudo-patron ID.

When you need to charge items to a different pseudo-patron ID, just replace the pseudo-patron ID in the Patron Bar and click on the Blue Arrow.

Note: In training, you will notice that the pseudo-patron ID’s are textual (“bind1”, “bind26”, etc. However, for actual implementation, they may be numeric, as they are currently in HOLLIS.

Note: If your HOLLIS logon currently has the security level that allows it to charge item records to a pseudo-patron ID, then your Aleph logon should correspondingly have the same ability. However, you should verify that this is the case. If you did not charge item records to a pseudo-patron ID in the past, but your unit’s workflow changes and you need to be able charge item records to a pseudo-patron ID, contact your Aleph Liaison to request a change to your security profile.

11.1.2 Discharging from a Pseudo-Patron ID

Discharging items from a pseudo-patron ID, for example for items returned from the bindery, is handled in Aleph in the same way as are regular circulation discharge transactions.
1. Click on the **Return Tab** or hit the F6 key. This will bring up the **Return** screen.

2. Wand in or key in the barcode for the first item to be returned in the **Item Bar**.

3. Click on the Blue Arrow or hit the <Enter> key. The return will register, and information about the Pseudo-Patron ID and the item will appear in the windows in the middle of the screen.

If discharging a number of books from the bindery, you can then wand in the next barcode number. You can repeat the process as many times as is necessary to discharge items returned from the Bindery or your End-Processing Department. You do not need to reset the Return function to discharge items that were originally charged to different Pseudo-Patron ID’s.

**11.2 Searching and Transferring Items to the Bindery Using ABLE Software**

Libraries have the option of transferring items directly in the ACME Bindery ABLE Software product, which is a third party product outside of Aleph. The ABLE client can search for and retrieve items in Aleph, and the client can also be used to transfer items to the bindery.

For more information, see these two documents located at the Aleph Documentation site: http://hul.harvard.edu/ois/systems/aleph/doc-rept.html#binding:

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12. Printing Item Information

There are two ways to print item record information in the Cataloging Module and the method you use depends on the kind of information you are working with:

**Print Option 1: Use F11 to Print Lists and the Full + Link Display:** F11 is used to print lists such as the Brief List or the Items list, and to print the Full + Link display from the Search tab. You can use F11 on any list that contains gray and white horizontal bars.

Items List (display has gray and white column headings)

To use the F11 key, make sure the Pane containing the display you want is in focus. Change your Print Configuration to Preview to see a preview of what is to be printed. Click Print to print the List.

Depending on the kind of Windows system you have installed on your workstation, you may also be able to export the contents of a list to an Excel spreadsheet by right clicking on the Print Preview and choosing the Export to Microsoft Excel option.

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Export to Microsoft Excel Option

**Print Option 2: Printing Using the Windows Print Menu**: If you wish to print out information about a specific item or if you wish to print a screen that has solid gray lines behind it, you can right-click on the display and choose Print from the menu, or, if the pane is in focus, use the <Ctrl>+P keys.
No Preview Option Available: You will not see a preview of what is to be printed when you choose this display. You can also export the Item Display to an Excel spreadsheet by choosing the Export to Microsoft Excel option, if available.

13. Additional Resources and Help

The Harvard/Aleph Website: To obtain copies of the documentation concerning Aleph, see the Aleph Website at http://hul.harvard.edu/ois/systems/aleph/docs.html

The Aleph Support Center: Please send any problems you find with items or anything else with Aleph to the Aleph Support Center at: http://hul.harvard.edu/ois/systems/aleph/support.html

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