Aleph Serials Module-Predictive Check-in Workflow

1 First Time Check-In in Aleph Using Prediction

This is the workflow currently being taught in the Aleph training program. This is NOT a how-to document. This workflow document is meant to complement the Predictive Check-in Learner's Guide, available at http://hul.harvard.edu/ois/systems/aleph/doc-acq.html#serials

1. Start in Cataloging Module (for more generic titles, begin in the Search Module and push to Cataloging).
   - Search for bibliographic record
   - Review bibliographic record
   - Bring up HOL record
   - Check HOL record for legacy holdings data and RLN lines
   - Verify that the latest 853 field has all relevant publication pattern subfields to create a prediction pattern

2. Push to the Serials Module
   1. Review the Subscription Log; review and delete any action dates as needed
   2. Review the Subscription Information Form
      - Note the Subscription Sequence Number of your library's subscription
      - Verify the Item Status for the title; change if necessary
      - Verify the number of days in the First Claim field ("action interval"); change if necessary
      - Other options: Set Temporary Location Flag, Copy ID flag, or Remote Storage ID if the piece is going to be sent to the Harvard Depository

3. Return to HOL Record
   - Add 853X field

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2 Subsequent Check-In Using Prediction in Aleph

This is the workflow currently being taught in the Aleph training program. For more detailed instructions on how to process materials, please see the Predictive Check-In Learner's Guide, available at [http://hul.harvard.edu/ois/systems/aleph/doc-acq.html#serials](http://hul.harvard.edu/ois/systems/aleph/doc-acq.html#serials).

1. Start in Cataloging Module-confirm HOL record data-if you see 853X field, proceed to Serials Module.

2. Push to Serials Module-cursory check of Subscription Log and Subscription Information Form

3. Bring up Items List

4. Check-in expected issue by clicking on Arrive button

5. When all issues for the volume are received, click on Open Items on the Subscription List to open up the next volume's cycle of issues to be checked-in.

3. Sending Issues to the Bindery

1. Bring up title in Items Module

2. Highlight first item checked-in and click Bind/Change

3. Select all issues checked-in to Aleph in the Bind/Change Window

4. Click Bind

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5. Modify Item to reflect the volume; remove **Temporary Location** flag if applicable

6. Charge item out to bindery pseudopatron, if applicable

When bound volume is returned from the bindery:

1. Discharge item from bindery pseudopatron, if applicable

2. Move to Items Module, remove **Item Processing Status** of "At bindery"

3. Bring up **Navigation Window** and click **Catalog HOL** to bring up **Holdings List** in **Cataloging Module**

4. Select your **HOL record**

5. Update the 863 field with the bound volume information (or create new 863 if applicable)

Delete **RLN** fields (if applicable)