Temporary Location functionality in ALEPH for Serials

Many libraries have serial titles that are shelved in two locations. The most common occurrence of this is when the current edition of a serial is shelved in the Reference Collection and the back file is shelved in the General Collection.

Temporary location information is displayed in the OPAC at the item level through the use of the Temporary Location Flag located in the Subscription Record and in Item Records in the Serial Module.

This Workaid contains instructions on how staff can designate the Temporary Location of an item or items in the ALEPH GUI and have that information display in the OPAC.

In HOLLIS, libraries could designate the temporary location of an issue or volume through the use of the |d in the LOC. Subfield d information was converted into ALEPH holdings records and put into the |z of the 852 field. Additionally (in HOLLIS), temporary location was noted usually on the DIV line in the OPR. In ALEPH, DIV line information was converted into the check-in note of the Subscription record. This check-in information is made available to staff when an item is arrived in ALEPH.

SIT recommends that staff consult holdings records for |z information as a first indication that a title has a portion of its’ holdings in a temporary location. For material cataloged in ALEPH, SIT recommends also that staff continue to put Temporary Location information in the |z of the 852 tag in the Holdings Record.
The following instructions are for a first time setup of a Temporary Location in ALEPH.

- Once you have identified your bibliographic record, retrieve the associated holdings record from the server.
- It may also be useful at this time, to note the last receipt for your title. The latest volume or issue will be listed in an 863 tag or an RLN field in the holdings record.
- Check for |z information in the 852 field (e.g. Latest in Reference, Latest in Reading Room).
- Push that record to the Serials module.
- Retrieve the Subscription List.

- Highlight the subscription that applies to your library and click on modify.
Temporary Location Information in the Subscription record

- Change the permanent location to the appropriate temporary location for this subscription.
- Click on the Collection field and choose from the list of Collections. These Collections apply to your library only. This list should contain all the locations, both permanent and temporary for your library.
- Next, click on the Temp Location box.
- All items that are associated with this Subscription Record will contain this same Collection code as listed in the Subscription Record. NB: At this time, this process applies only to items created through predictive check in.

The Temporary Location is set in the Subscription Record because of the linkages that exist between a Subscription Record and items associated with it. Those linkages allow for persistent information between items and associated subscriptions.
Temporary Location in the Note Field of the Subscription Record

In the Subscription Record, the **Note field** on Tab 2 can contain any information relevant to a subscription. In this instance, it contains: Latest on Reference. This information will appear also in the Internal Note field of any items associated with this subscription and will also display in the Item Arrival Form. SIT recommends that Temporary Location information be entered into the Note Field of the Subscription Record, so that it will appear prominently and not be buried within a long Check-in Note.
Temporary Location information in the Items List (Serials Module)

- The Temp Loc column in the Items list contains a check mark because the Temporary Location box was checked off in the associated Subscription record, which, in turn, updates all the associated items. This serves as a visual indicator that this item should be sent to a temporary location when the item is arrived in ALEPH.
Temporary Location within the Item Form (Serials Module)

If you highlight an item in this list and click on modify, it retrieves the Item Form. The Item Form lists Ref in the Collection box and contains a checkmark in the Temporary Location box. This information was expanded from the Subscription record associated with this list of items.
Receipt of an item with a Temporary Location (Serials Module)

In the Serials Module, items are arrived by highlighting an item from the list of items that corresponds to the piece in hand and clicking on the Arrive button. The Item Arrival Form for v. 1, no. 1 (2002: Jan.) contains the instructions: Latest in Reference in the Librarian Note field. Once this item is received in ALEPH, it will be sent to Reference.

NB: Information in the Note field of the Subscription Record is expanded into the Internal Note field of any predicted items that are associated with the Subscription Record. This note will also appear in the Internal Note field on Tab 2 of the Item Form. This Internal Note will then appear in the Librarian Note field in the Item Arrival Form.
Removing the Temporary Location indicator on an individual item record (Serials Module)

- From the Items list, highlight the item that will have the change in collection code.
- Either click on modify or double click on the highlighted item to bring up the item record.
- Remove the Temp Flag
- Click on the Refresh button
- The Collection code will revert back to the Collection listed in the |c of the Holdings record.
- This item will no longer list Reference as the location in the OPAC
Removing Temporary Location information at point of binding.

At many libraries, it is at the point of binding that items are moved from one location to another. In ALEPH the processes associated with binding take place in the Items module. Below is a list of items from the Items Module. As you can see, these items are listed as shelved in Reference. Note, that the Temporary location column is checked off, as is the Note field.

Please refer to ENP training manual for specific instructions on “rolling up” items for binding.
In terms of Temporary location information, when the items are collapsed (rolled up), it is at that point that the Temporary location information could be changed if it is at this point that the volume is moved to another location. This item is for the bound volume (v.1: 2002). The item record now lists the Collection as General and the Temporary Location box is unchecked.
The item display for Vol. 1 (2002) no longer has a Temporary Location flag in the Item List.
Serial titles with more than one Temporary Location

Some libraries have serial titles that are shelved in more than one Temporary Location. For example: a serial title may have the current year of issues shelved in the Reading Room, the previous year shelved in Reference and then finally issues are shelved in the General Collection. ALEPH cannot automatically set the Temporary Location for more than one location. As issues, volumes or editions are checked-in, staff can use information in |z of a holdings record and the Temporary Location information in item records as a way to keep track of where serial volumes should be shelved. In the example above, as issues are received, staff would have to change the Temporary Location from Reading Room to Reference. Please be aware that libraries must establish a Collection in ALEPH for each Temporary Location. Contact Kathy Anderson (5-3724) OIS if there is a Collection that you need to establish.

Duplicating an item record for a title with a Temporary Location

Instructions on how to duplicate an item record are available in SERM and SERP. However, special instructions are required when duplicating an item record that contains a Temporary Location. In order to get call number information into the duplicated item record, please do the following:

- Highlight the item that you wish to duplicate
- Click on Duplicate
- Change the Collection code to what is in |c of the HOL record and uncheck the Temp Loc flag.
- Make other changes as appropriate (e.g. changes to enumeration)
- Click on Refresh (Call number information will be filled in)
- Change the Collection Code back to the Temporary Location and click on the Temp Loc flag box.
- Click on Update

In order for call number information to be brought over from the HOL record into the item record, the Collection code must reflect what is in |c of the HOL record, not the Temporary Location. You can then go back and change the Collection code to the Temporary Location so that Temporary Location information will display in the OPAC.