Using Routing Lists

Libraries wishing to route materials to a group of patrons can use the Routing List functionality in the Serial Tab.

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1. What is the Aleph Routing List Functionality?

• The routing list function allows you to create a list of people to which you can route serial issues.

• The functionality allows you to print a routing slip with the names of the members of the routing list.

• The function allows you to simply create and print a routing list, or you can loan issues to keep track of issues being routed.

2. Records Required for Creating a Routing List

• A Serial Order Record

• A Subscription Record

• An Item Record containing the issue details. This item must be linked to the Subscription Record.

• A Patron Record for the Group Leader: The Group Leader is the patron responsible for the routing list. The Group Leader can be a patron, or the library can create a Routing Pseudopatron. If material is charged out to members of the routing list, it is the Group Leader that will receive any overdue notices for any items not returned by the end of the routing period.

• Patron record for each member of the group
3. Additional Information about Routing Lists

- Staff members who set up routings lists must have access to the patron file. This should be limited to 1-2 people in your unit.

- If you decide to loans issues, we recommend that you set up a Routing List Pseudopatron to serve as the Group Leader.

- You do not have to change the item status for routed issues—issues that have an Item Status of “In Library Use” can be loaned to members of a routing list.

4. Known Problems with Routing Lists

- If you unarrive a predicted issue (as you might if you had checked in the wrong issue), you will not get the message nor will a Routing List be printed when you do check in that issue. Note that if the issue has been loaned, you will have to return it before you unarrive it. When you do check in that issue, you will not get the message and the issue will not be loaned. This problem has been reported to Ex Libris.

5. Setting Up a Routing List /No Loan

To set up a routing list without loaning issues:

1. Go to the Serial Tab.
2. Display the Subscription List.
3. Highlight your Subscription.
4. Click on Routing List under the word Subscription on the Navigation Pane. The Routing List Node will open.
5. Click the New button on the right hand side of the screen. The Lower Pane will open to the Routing Info tab.
6. Fill in Tab 1 (Routing Info) as follows:

**Sub. Sequence**: This is the sequence number of the subscription to which the Routing List is linked. If there is only one subscription, the system will automatically enter 1. If there are multiple subscriptions, display the list of subscriptions by clicking the arrow to the right of the field. Select your subscription from the list.

**Group Leader ID**: Enter the Patron ID of the Group Leader. This is the patron (which can be a pseudopatron) to which the Routing List is assigned. **We recommend that you set up a library pseudopatron for Routing Lists.** If you do not know the Patron ID, you can click on the List button to the right of the field and search the patron file by name or barcode number.

**Add as Member**: Check this box if the Group Leader should also be a member of the group. If using a Routing List Pseudopatron, checking off this box is optional if not loaning issues.

**Budget**: Do not use. Not relevant at Harvard.

**Loan Serial**: The checkbox will be checked off by default. Uncheck this box to set up a Routing List with no loan.

**Loan Days per Member**: Leave this blank for a Routing List with no loan.
**Group Status**: You can temporarily suspend a Routing List by changing the status to NA (Inactive). To reactivate the Routing List, change the status back to AC (Active).

7. Click on the Add button to save the Routing List (the Group Leader information will appear in the upper pane).

8. Go to Tab 2 (Member List) and click on New to add a member to the Routing List.

9. Fill in the Routing List Member Form as follows:

   **Member ID**: Enter Patron ID of first list member. If you do not know the Patron ID, you can click on the List button to the right of the field and search the patron file by name or barcode number.

   **Group**: Leave this field blank.
10. Click Update to add the patron to the routing list.

11. Continue adding members until all members of the routing list are added.

6. Setting Up a Routing List/ With Loans

To set up a Routing List with Loans:

1. Go to the Serial Tab.

2. Display the Subscription List.

3. Highlight your Subscription.

4. Click on Routing List under the word Subscription on the Navigation Pane. The Routing List Node will open.

5. Click the New button on the right hand side of the screen. The Lower Pane will open to the Routing Info tab.

6. Fill in Tab 1 (Routing Info) as follows:

   **Sub. Sequence**: This is the sequence number of the subscription to which the Routing List is linked. If there is only one subscription, the system will automatically enter 1. If there are multiple subscriptions, display the list of
subscriptions by clicking the arrow to the right of the field. Select your subscription from the list.

**Group Leader ID:** Enter the Patron ID of the Group Leader. This is the patron (which can be a pseudopatron) to which the Routing List is assigned. We recommend that you set up a library pseudopatron for Routing Lists. If you do not know the Patron ID, you can click on the List button to the right of the field and search the patron file by name or barcode number.

**Add as Member:** Check this box if the Group Leader should also be a member of the group. We recommend adding the Routing List Pseudopatron as a member of the Routing List because you will be able to see the titles currently on loan to the pseudopatron in the Circulation Module.

**Budget:** Do not use. Not relevant at Harvard.

**Loan Serial:** The checkbox will be checked off by default. If this option is selected, the system will loan the issue to the Group Leader using the circulation loan function. This means that the loan will be displayed in the OPAC in the patron’s list of loans. A due date will be displayed and the library can send the patron (which may be a pseudopatron) overdue notices. If this option is selected, the Loan Days per Member field must be filled in otherwise the Update button on this screen will not be activated. The due date is calculated as the number of days multiplied by the number of Routing List members.

**Loan Days per Member:** The system will multiply this value by the number of members in the list to calculate the due date of the item.

**Group Status:** You can temporarily suspend a Routing List by changing the status to NA (Inactive). To reactivate the Routing List, change the status back to AC (Active).

12. Click on the Add button to save the Routing List (the Group Leader information will appear in the upper pane).
13. Go to Tab 2 (Member List) and click on New to add a member to the Routing List.

14. Fill in the Routing List Member Form as follows:

   **Member ID:** Enter Patron ID of first list member. If you do not know the Patron ID, you can click on the List button to the right of the field and search the patron file by name or barcode number.

   **Group:** Leave this field blank.

15. Click Update to add the patron to the routing list.
16. Continue adding members until all members of the routing list are added.

7. **Checking in Issues with Routing Lists**

1. On Check-In List, check in issue as usual. A dialog box will appear indicating that the subscription has a Routing List.

2. Click on OK.

3. Routing slip will print automatically.

4. If the loan option has been selected, the issue will be loaned to the Group Leader.
8. Returning Loaned Issues

1. Bring up the title in the Serial Tab

2. Click on Utilities from the Main Menu

3. Select Return Item from Routing Group. Return Item form will display.

4. Enter/scan the barcode number (if the piece does not have a barcode label, you can copy the barcode number from the Check in List or the Items List)
5. Click on OK

Note: You may also return routed issues that have been loaned in the Circulation Module.

9. Displaying the Last Item Loaned
To determine the last item loaned on the Routing List:

1. Bring up the title on the Serial Tab
2. Display Subscription List
3. Highlight your Subscription
4. Click on Routing List on the Navigation Pane. The last item routed will be display in the Last Item Column

5. Note that this display does not indicate whether the issue is still being routed or has been returned. If you loan routed issues, you can see if the issue is still on loan in the Check-In List. If there is an asterisk next to the number in the Loans column on the Check-In List, the issue is currently on loan.
10. Viewing Issues Charged to the Group Leader

To see the issues that are currently charged out to the Group Leader:

1. Go to Serial Tab
2. Display Subscription List
3. Highlight your Subscription
4. Click on Routing List on the Navigation Pane
5. Click on Tab 2 (Member List)
6. Highlight Group Leader
7. Click on Push to Circ button which will open the Circulation module and display the list of loans for the Group Leader.

Note that you must have authorization to view the patron list in order to see information about the Group Leader ID. No more than 1-2 people should have this authorization in your unit.

11. Removing Members from a Routing List

To remove a member from an individual Routing List:

1. Go to the Serial Tab
2. Display the Subscription List
3. Highlight your Subscription
4. Click on Routing List on the Navigation Pane
5. Click on Tab 2 (Member List)
6. Highlight the list member
7. Click on the Delete button
To remove a member from all Routing Lists:

1. Go to the Serial Tab
2. Click on Utilities from the Main Menu
3. Select Remove User from Routing Groups. Form will display

   ![Remove User from Routing Groups](image)

4. Enter the Patron ID of the User you want to remove from the lists. If you do not know the Patron ID, you can click on the List button to the right of the field and search the patron file by name or barcode number.
5. Click on OK. You will get a confirmation message.

   ![Delete Confirmation](image)

6. Click on Yes to confirm that you want to remove the user from all Routing Lists.

12. Creating Multiple Routing Lists

   It is possible to create more than one Routing List for the same title. For example, if you wanted to route a title to a group of supervisors, then to library staff, you could create two routing lists for the same title. You can decide which members will be added to each group, but you cannot add the same member to both groups. Therefore, if you use a Routing Pseudopatron, you will only be able to use this pseudopatron on one of the groups.