

Periodicals – receiving predicted items

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Change directory

Date	Status	Description of changes	Name
14.09.2020	Draft		L. Kaiser
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Reference documents

Reference	Path to document		
	Knowledge Centre – Prediction patterns		
	Knowledge Centre – Receiving Physical Material		
	Knowledge Centre – How to Withdraw an Item with Attached POL		



Table of contents

Chan	ange directory		
Refe	erence documents	2	
1.	Goal of this document	4	
2.	Status quo	4	
3.	Receive predicted items	4	
3.1.	Regular items	5	
3.2.	Irregular items	6	
4	Delete migrated predicted items	11	



1. Goal of this document

Goal of this document consists in giving directions to librarians on how to receive predicted items.

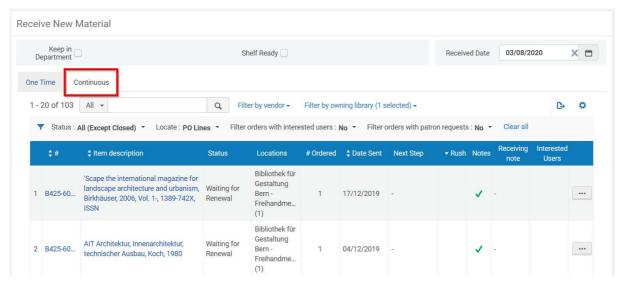
2. Status quo

Once the next predicted items have successfully been created in the metadata editor and saved, they will appear in the receiving module.

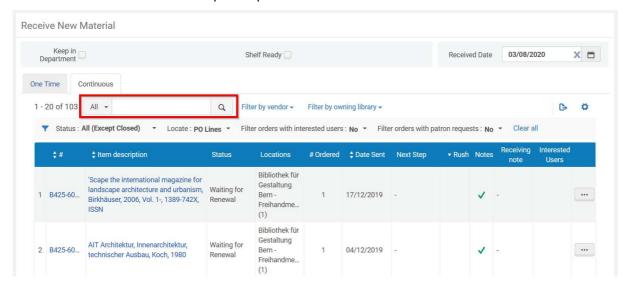
3. Receive predicted items

This chapter explains which steps must be undertaken in order to receive predicted items. For receiving items one must have an acquisition role. In order to open the receiving module click on: Acquisitions>Receiving and Invoicing>Receive.

In order to see the periodicals, choose the "Continuous" tab.



Use the search box to look for a specific periodical.

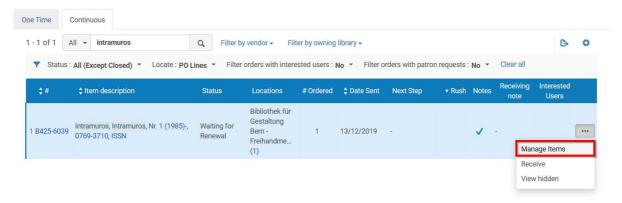




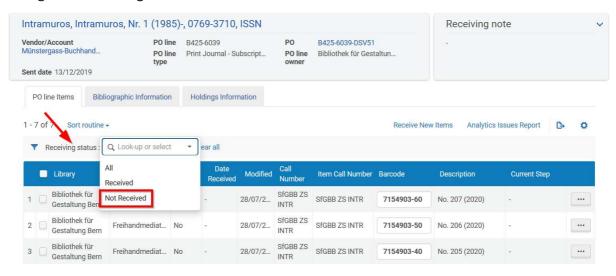
Based on two examples, we will now have a look on how to receive items. The first example shows a periodical with regular items. The second example will show how to handle a periodical with irregular items, that need to be adjusted.

3.1. Regular items

Once you have found the periodical, click on the ellipses and select "Manage Items".

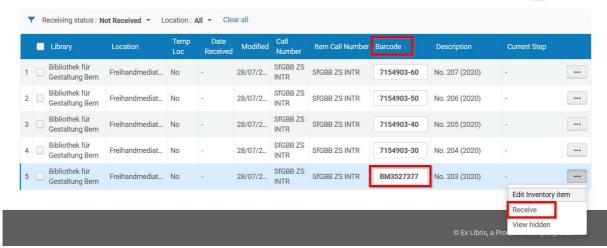


Change the "Receiving status" filter to "Not Received".

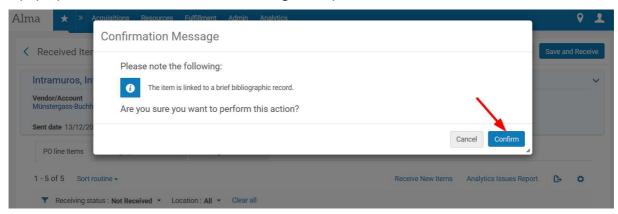


Find your item. Enter a barcode in the "Barcode" field, if applicable. Click on the ellipses next to the item select "Receive".

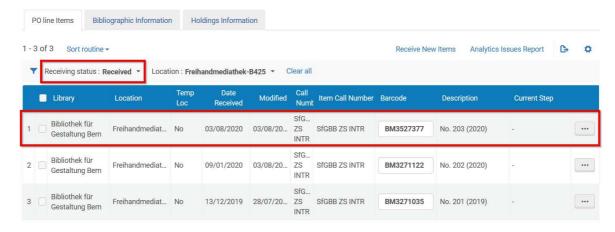




A pop-up window with a confirmation message will open: click on "Confirm".



To see your received items, click on the ellipsis and "Managed Items". Change the "Receiving status" filter to "Received". You should see your received item in the list and it will have the date received.



3.2. Irregular items

Sometimes it happens that a periodical has an irregular double issue (meaning that it wasn't possible to predict it when configuring the field 853 because the double issues are not published

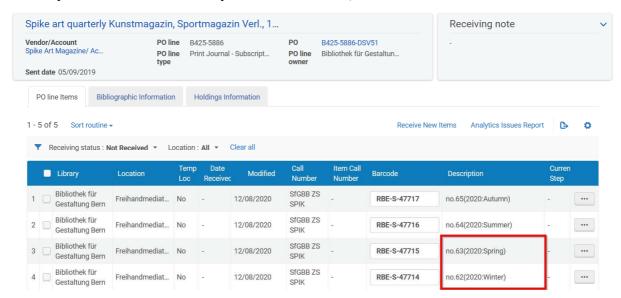


with the same frequency/regularity each year). One must modify one of the item and adjust its description (enumeration and chronology) and delete the other one that has become superfluous.

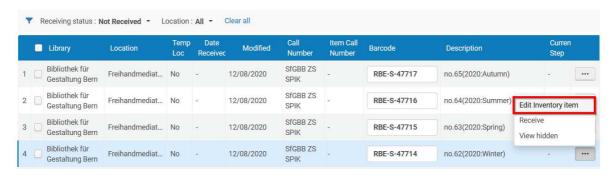
As an example, we will use Spike Art Magazine which has a double issue: no. 62/63

The first steps are the same as for regular items (see chapter 3.1.)

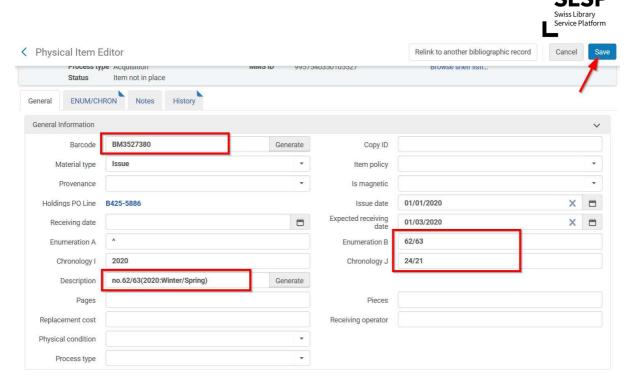
As it wasn't known beforehand that there will be a double issue, it wasn't possible to predict correctly the next items. This is why there are two items, one for no. 62 and one for no. 63.



You need to adjust one item and delete the other one. Click on the ellipses and select "Edit Inventory Item".

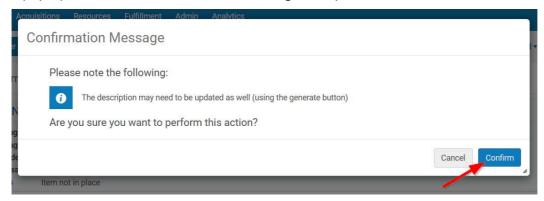


Enter a barcode in the "Barcode" field, if applicable. Adjust the fields "Description", "Enumeration" and "Chronology" accordingly.

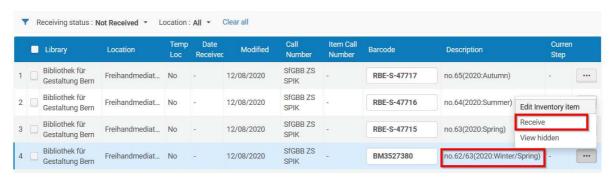


Click on "Save".

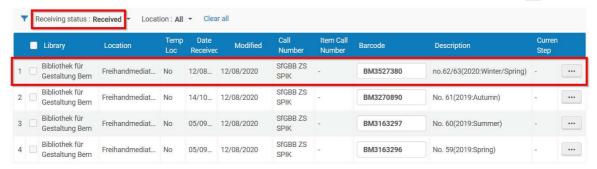
A pop-up window with a confirmation message will open: click on "Confirm".



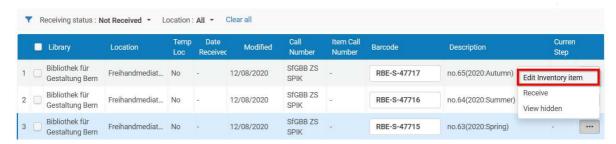
The item has been changed and you can proceed to receive it, by clicking on the ellipses and selecting "Receive".



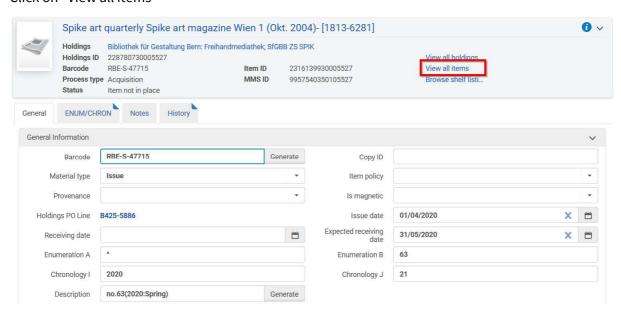




Now you have to delete the item for no. 63 because it has become superfluous. Click on the ellipses and select "Edit Inventory Item".

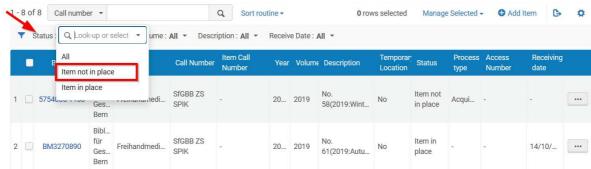


Click on "View all items"

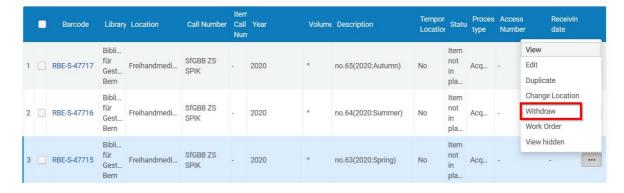


Change the "Status" filter to "Item not in place"

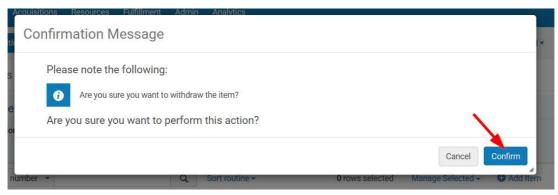




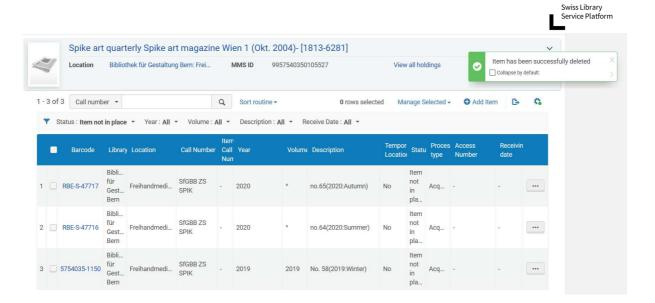
Select the item you wish to delete, click on the ellipses and select "Withdraw"



A pop-up window with a confirmation message will open: click on "Confirm".



Your item has been deleted



4. Delete migrated predicted items

Unfortunately, the process of deleting predicted items described in subchapter 3.2. only works for newly created/predicted items and not for migrated items. Deleting migrated items attached to an active PO line is quite complicated. Therefore, we recommend the libraries **not** to open the predicted items for 2021 before Go-live and to wait until after the migration in order to do it directly in Alma.

This chapter explains which steps must be followed to delete migrated items attached to an active PO line. Search for the periodical's bibliographic record and open the holdings list.



Click on "Add new holdings"

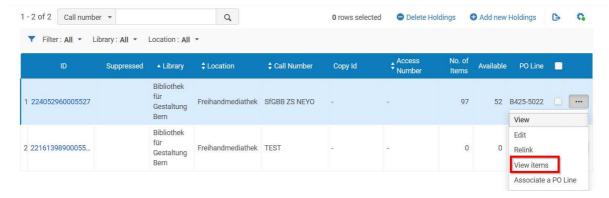


Save the new holdings record and go back to the holdings list

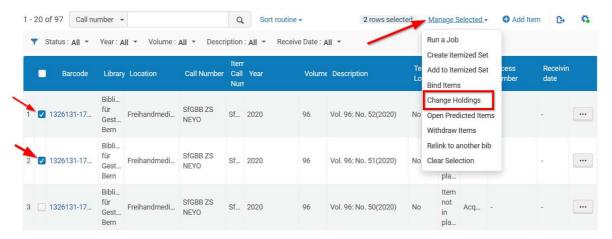




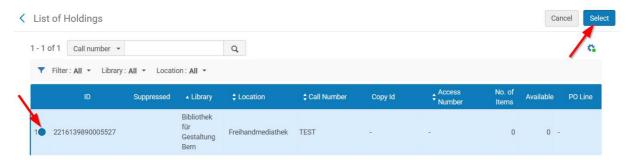
Select the original holdings record, click on the ellipses and select "View Items"



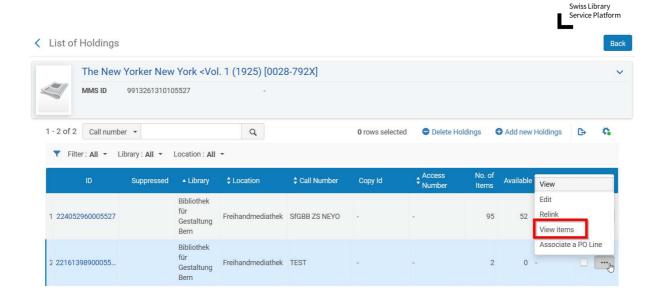
Select the item(s) you want to delete, click on "Manage Selected" and choose "Change Holdings" from the drop-down menu.



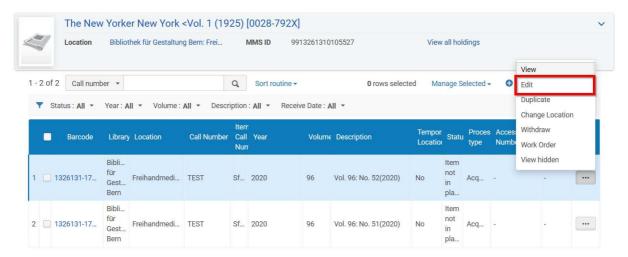
Choose the new holdings record and click on "Select"



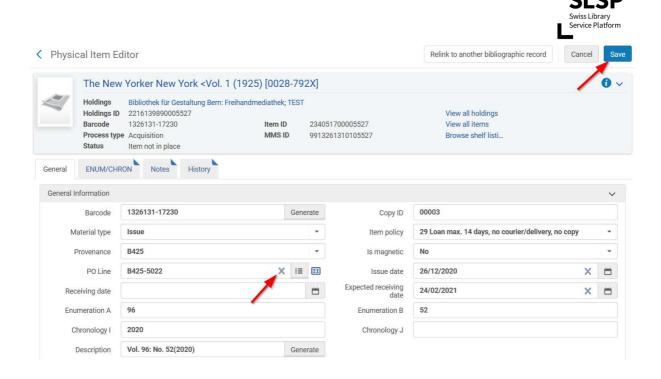
Go back to the holdings list and select the newly created holdings record, click on the ellipses and select "View items"



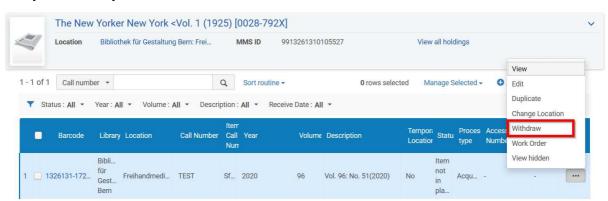
Before you can delete the item, you need to edit it. Select the item, click on the ellipses and select "Edit".



Remove the PO line link in the item by clicking on the X within the PO line field. Click on "Save".



Now you are finally able to withdraw the unwanted item!



Repeat the previous steps for every items. When you withdraw the last item, a pop-up window will open. Select "Delete the holdings record" and click on "Go".

