Unit 1: Overview of the Acquisitions/Serials Module

Acquisitions and Serials functions are combined into a single module in LINCC. The module consists of menu items, search bars, a Navigation Tree that groups major functions under six activity tabs, an upper pane that generally contains list views of records, and a lower pane that generally contains details of the record selected in the upper pane.

This manual describes the module's serials functions. For a description of acquisitions functions, refer to the LINCC Acquisitions manual, available from CCLA's Library Staff Resources web page.

Lesson 1: Navigating the Acquisitions/Serials Module

An overview of the Acquisitions/Serials module interface is shown below. Each area of the interface is described on the following pages.

Figure 1: The Acquisitions/Serials Module Interface (Serial Activity Tab)
Areas of the Acquisitions/Serials module interface are described below:

**Menu Bar**
Contains commands for features of the module, grouped in drop-down menus.

**Serial Bar**
Contains a search field that allows a serial record to be retrieved by search parameters. Displays the record number and title information for the active serial record(s).

**Navigation Tree**
Contains nodes that can be selected to access information or perform specific activities within the module. Options vary according to the selected activity tab.

**Upper Pane**
Displays information related to the node selected in the Navigation Tree. Generally contains list views of records.

**Lower Pane**
Displays information related to the record selected in the upper pane.

**Activity Tabs**
Correspond to major activities within a specific module. When an activity tab is clicked, the Navigation Tree and upper and lower panes will display related information and options.

**Application Toolbar**
Allows other LINCC modules to be opened from the Acquisitions/Serial module.
Lesson 2: Using the Menu Bar

In the Acquisitions/Serials module, very few actions are carried out using the Menu bar at the top of the main window. The most commonly used menu options are described on the following pages.

The ALEPH Menu

- **Connect to**: Determines the bibliographic database being accessed. The only setting is the college’s administrative database, XXX50 (where XXX represents the three-letter institution code).

- **Delete Item Defaults**: Deletes item record defaults after the Save Def function is used.

- **Delete Subscription Defaults**: Deletes subscription record defaults after the Save Def function is used.

- **Delete Order Defaults**: Deletes order record defaults after the Save Def function is used.

- **Show PC/Server Transaction Log**: Shows actions taken between the local computer and the server. Available details are the Database, Date/Time, Service Number, and Service Description.

- **Print History**: Shows the history of files printed during the active session.

- **Options**: Allows customization of some aspects of the LINCC client.

- **Switch Application**: Opens other LINCC modules.

- **Version Check**: Allows updates to the LINCC client to be automatically downloaded and installed.

- **Exit**: Closes the Acquisitions/Serials module.
The View Menu

- **Switch to Order Tab**: Displays the Order activity tab options in the Navigation Tree.
- **Switch to Invoice Tab**: Displays the Invoice activity tab options in the Navigation Tree.
- **Switch to Admin. Tab**: Displays the Administration activity tab options in the Navigation Tree.
- **Switch to Index Tab**: Displays the Index List (Search Order activity tab) in the Navigation Tree.
- **Switch to Serial Tab**: Displays the Serial activity tab options in the Navigation Tree.
- **Clear Order/Serials**: Clears the order or serial records being displayed.
- **Clear Invoice**: Clears the invoice being displayed.
- **Full Screen**: Not used.

The Utilities Menu

- **Return Item from Routing Group**: Displays a window with options to check-in an item that was previously checked out to the group leader of a routing list.
- **Remove User from Routing Groups**: Displays a window with options to remove a user from every routing group of which the user is a member.
- **Item Process Status**: Displays a window with options to change the item process status of a selected group of items.

The Orders Menu

The Orders menu is used with acquisitions functions. Its functionality is described in the LINCC Acquisitions manual.

The Services Menu

- **Serials**: Includes several reports and services that can be used with managing serials, including Claim Letters and Reports, a Report of Routing Lists, the List of Serial Titles and Number of Arrived Issues, and the Bind Alert Report.
Lesson 3: Using the Serial Bar
The Serial bar allows a serial record to be retrieved by matching search parameters.

To use the Serial bar:
1. In the first field of the Serial bar, select a search type.
2. In the adjacent search field, enter the search term or number that corresponds to the selected search type.
3. Click the blue arrow.

The following search types are available in the Serial bar:

- **BIB Sys No.**: Used to locate a title with a subscription record by system number.
- **ADM Sys No.**: Used to locate a title with a subscription record by ADM number.
- **ISSN**: Used to search subscription records by ISSN number.
- **Title**: Used to perform a Common Command Language (CCL) search. The complete title must be entered in the second field. For example, “Journal of nursing care” must be entered in whole – not as a partial title. If the title is found, the Expected/Not Arrived list will be displayed. If more than one match to the term is entered, the message “Multiple matching records found. View in brief list?” will appear. Clicking Yes will display the titles in the Show node of the Search activity tab.
- **Issue Barcode**: Used to perform a numeric search of the barcode entered.
- **Order Number**: Used to search subscription records by their order number.
Lesson 4: Using Activity Tabs

The Acquisitions/Serials module contains six activity tabs, available above the Navigation Tree.

The information displayed in the upper and lower panes and the options in the Navigation Tree are determined by the selected activity tab. The activity tabs included in the Acquisitions/Serials module are the Order, Invoice, Administration, Order Search, Serial, and Search activity tabs. These tabs and the options available in the Navigation Tree are described in this lesson.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
<th>View in Navigation Tree</th>
</tr>
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<tbody>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>The <strong>Order</strong> activity tab is used to process an order. (Used with acquisitions functions; functionality is described in the LINCC Acquisitions manual.)</td>
<td><img src="image" alt="View in Navigation Tree" /></td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>The <strong>Invoice</strong> activity tab is used to process an invoice. (Used with acquisitions functions; functionality is described in the LINCC Acquisitions manual.)</td>
<td><img src="image" alt="View in Navigation Tree" /></td>
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<tr>
<td><img src="image" alt="Icon" /></td>
<td>The <strong>Administration</strong> activity tab is used to work with budgets and vendors and access the Task manager.</td>
<td><img src="image" alt="View in Navigation Tree" /></td>
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<tr>
<td><img src="image" alt="Icon" /></td>
<td>The <strong>Order Search</strong> activity tab is used to access the Index List. (Used with acquisitions functions; functionality is described in the LINCC Acquisitions manual.)</td>
<td><img src="image" alt="View in Navigation Tree" /></td>
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The **Serial** activity tab is used to work with serials.

<table>
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<td><img src="image" alt="Navigation Tree" /></td>
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The **Search** activity tab is used to perform Find and Browse searches for bibliographic records using a variety of parameters.

| ![Icon](image) | ![Navigation Tree](image) | ![Navigation Tree](image) |