

# Management of serials

BiblioMaker PRO includes the management of serials and makes your life easier in the following domains :

- Cataloguing of serials
- Checking of the arrival of new issues
- Printing of a circulation list for issues
- Cataloguing of articles

This document describes how to manage your serials with BiblioMaker.

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## 1. Cataloguing a periodical

Each serial you have subscribed must be entered in the Titles file. When cataloguing a serial, please choose the **Serial** title type.

It is very important to understand that the record you enter under this type is for the whole serial and not for 1 issue only. This is why the information you enter are quite general : serial title, publisher, first year of publishing, previous title (if the serial has changed its title), ISSN, subscription price, etc.

Usually, when a serial changes its title, you create a new record in the Titles file : in the NOTES ZONE of this record, you enter the previous serial title. And in the record of the old serial, complete the NOTES ZONE with the new title.

### 1.1 Formula for automatic numbering of issues

Numbering				
Method	No [1;1;52;1;1], [1;1;0;2;1]			
Next	12/2011/	Sample	No 12, 2011	
Remarks				
Periodicity	7 days	Weekly	End date of subscription	31.12.13

Enter a numbering method and a next number at the **Issues** page.

Entering a numbering method is like entering a function with several parameters in a spreadsheet.

With the numbering method filled out, BiblioMaker is able to calculate the next issue number depending on the last registered issue. This makes the issues registration easier.

You will find further information on the numbering method in the BiblioMaker reference handbook. Furthermore, a database with some serials and an assistant for creating a numbering method are available on the web site <http://serials.bibliomaker.ch/Assistant/French/assistant.html> (french) or <http://serials.bibliomaker.ch/Assistant/German/assistant.html> (german).

In the cataloguing template for serials, enter a value in the PERIODICITY and END DATE OF SUBSCRIPTION fields. Using these data, the system will be able to highlight serials for which you have not received the last issue that should have been already delivered.

## 1.2 Creating a circulation list

Addresses	Code	Type	Surname
  	L106	Reader	Bonanomi Sonia
	L111	Reader	Cygan Pauline
	L120	Reader	Meyer Peter
	<u>L122</u>	Reader	Rossel Simon

If you'd like to let a serials circulate among interested readers, you can fill out the ADDRESSES field. Enter the reader's code (or the name after a slash) in the circulation order. This **Circulation list** can be printed after you have registered an issue.

After you have registered all serials you have subscribed to, print the list called **Issues control barcodes**. This list prints for each serial a barcode used for the serial identification when registering issues.

## 2. Issues control

You register the issue delivery in the **Issues** file, using the **Action>New** command.

The screenshot shows a dialog box titled "Add issue - Nr 1". It features a standard macOS-style title bar with three window control buttons (red, yellow, green) on the left. The main area contains several input fields: "Title ref." (a small text box), "Title" (a large text area), "Remarks" (a large text area), "Status" (a dropdown menu), "Copies" (a numeric input field with left and right arrows), "Issue Nr" (a text box), "Own title" (a text box), "Arrival date" (a date picker showing "04.09.2015"), and "Observations" (a large text area). At the bottom, there is an orange bar with icons for back, forward, delete, help, and attach, and two buttons: "Cancel" and "Validate".

### 2.1 Serial identification

First, identify the serials for which you register the issue : enter a value in the TITLE REF. field using one of the following methods :

- scan the barcode printed on the issue (works only if the barcode begins with 977).
- scan the barcode printed on the **Issues control barcode list**
- enter some words from the serials title after a slash (example : */journal american psychology*)

### 2.2 Checking the issue number

When the serials has been identified and if a numbering method has been entered for the serial, BiblioMaker automatically fills out the ISSUE NR field with the issue number you should have received (number based on the previously entered issue number). Two situations can arise :

- If the suggested issue number is correct, just complete the record and validate it.
- If the suggested issue number is wrong, there is a good chance that BiblioMaker suggests the previous issue number, meaning that you didn't receive it. In this case, click on the **Copies** button, modify the copy and tick the **Missing** check box. Validate the issue record and register the issue you have received.

### 2.3 Printing the barcode label and the circulation list

After you have registered an issue, you can print a **barcode label** and maybe the **Circulation list** for the issue.

### 3. Cataloguing articles

If you find relevant articles in the issue, you can catalogue them.

You catalogue an article in the Titles file. After you have called the **Action>New** command, choose the **Article** title type.

Cataloguing rules for articles are quite similar to the rules for books. The main differences are :

- Leave the IMPRINT field empty
- The article source is mentioned in the NOTES ZONE field, as follows : IN : [Serial title], [Issue number] ([publication date or month]), pp. [page number]

There is a function making the data entry in the ZONE NOTES field easier : enter in the ISSUE REF. field the issue barcode generated by BiblioMaker. The ZONE NOTES field is automatically filled up by the software and you just have to complete the field with the number of pages.

<b>Issue ref.</b>	234
<b>Notes zone</b>	IN : Byte, Nr 4, April 2009, pp. 34-40

#### 3.1 Managing barcodes

By default, BiblioMaker generates a barcode for each article. This barcode can be printed on a label if the article is a photocopy.

But if you catalogue an original article inside an issue, the latter already has a barcode and it is not necessary to attribute a barcode to each article. In this case, it is recommended to delete the generated barcode on the **Copies** page of the cataloguing template for the article.

If an article has been linked to an issue with the ISSUE REF. field and the article has no barcode, in the online catalogue the detailed view of an article will show the availability of the issue the article comes from. Said in another way, if an issue is lent, all articles within this issue are also displayed as lent.

## 4. Serials control

By checking the serials, you will notice if the subscription for a serial is not over (and you would not receive issues any more) and if you have not received due issues.

### 4.1 Checking subscriptions

In the Titles file, do a search in the field END DATE OF SUBSCRIPTION to find serials for which the subscription is not valid any more. You can also print the **Schedule of serials subscription** after you have searched for all serials titles.

### 4.2 Checking the delivery of issues

Usually, issues are missing for one of the following reasons :

- after an administrative mistake, you don't receive the issues from a certain date on. Print the **Serials control list** from the Titles file. This list highlights the serials for which you have not received any issue for a long time (duration exceeding the serials' periodicity). The system takes the expiration date of subscription into account and does not consider an issue to be too late if there is no more subscription for the serial.
- after a problem with the post service, you don't receive a particular issue, but the following ones are distributed. You will realize the problem when registering the issue following the missing one. Indeed, BiblioMaker will suggest the issue number corresponding to the missing one. The **List of missing issues** (available from the **Issues** file) also highlights the missing issues.
- after you have received an issue, you realize later that it is missing (stolen or put at the wrong place). In this case, modify the issue record and tick the **Missing** check box in the copies management. You may then print the **List of missing issues**.

There is no function for sending a reminder to a supplier. This function will be developed in a future version of BiblioMaker.