

axiell

**Axiell Collections**  
**model applications 5.1**  
release notes





## Axiell ALM Netherlands BV

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# 1 A brief list of the major changes

Version 5.1 of the Axiell Collections model applications (previously known as the Adlib model applications) has been developed for Axiell Collections (version 1.14 and up) only and requires SQL Server 2019 or higher. We recommend always using the latest Axiell Collections core software release available, regardless of the Collections model application version you have.

Note that a new model application is not the same as a new Collections (core software) version. The latter is easy to install, similar to installing updates of other software on your computer. It introduces new functionality and fixes bugs. A new model application on the other hand, means new and changed database structures, screens and application structure. It usually also means that your data has to be migrated, which is a complicated process. If a core software update is like buying a new tv or a new chair, then an application upgrade is like moving house: you probably don't want to do it if you're happy with your current dwelling.

Besides many small improvements, model applications 5.1 contain quite a few major changes too:

- Full text indexes have been implemented for all databases. For you as an end user, this means an increase in search performance in long text fields, fields with both unique and non-unique terms and linked fields plus the new ability for real phrase searching in such fields via the *Standard* search (not via *Advanced* searching yet) and the new option to use the *Starts with* operator in the *Standard* search. Please see the [Collections 1.14 release notes](#) for more information about those search options. This functionality requires Axiell Collections 1.14 or up and SQL Server 2019 or higher to be installed on your server, so model application 5.1 cannot be installed for older versions of SQL Server and won't run on older versions of Collections.
- Reading room functionality (available in English and Dutch): three new data sources (*Users*, *User categories* and *Item requests*) have been added to the model application to support (reading room) user registration in the database itself, the registration of (reading room) user categories and the handling of the different stages of reserving, lending and returning of items in the reading room of your institution via Axiell Collections. See chapter 3.1 for details.



- In a simplified form, functionality from the old Adlib (Library) Acquisitions module has been integrated in the new model application and is available to all users without extra cost. The functionality is implemented through the new *Library purchase orders* data source. See chapter 3.2 for details. This chapter also describes a new and easy way to create multiple copy records for a title record and automatically link them to each other.
- Simplified functionality from the old Adlib (Library) Serials module has been integrated in the new model application as well and is available to all users. The functionality comes in the shape of two new data sources: *Serial subscriptions* and *Manual purge of serial issues*. These allow libraries to register their subscriptions to serial publications and manage the received issues. See chapter 3.3 for details.
- WMTS based map services required an extra editable field in the *Maps* data source to identify the TILEMATRIXSET property, which wasn't present in the 5.0 model application yet, so in 5.1 it has been added still:

## –Tile matrix

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### Tile matrix set

Correct settings for a WMTS based service can be found here: [https://services.datafordeler.dk/GeoDanmarkOrto/orto\\_foraar\\_wmts/1.0.0/Wmts?username=RDPIOHDJXO&password=Axiell-2022&service=WMTS&request=GetCapabilities](https://services.datafordeler.dk/GeoDanmarkOrto/orto_foraar_wmts/1.0.0/Wmts?username=RDPIOHDJXO&password=Axiell-2022&service=WMTS&request=GetCapabilities)

So the Tile matrix set property for this service should be set to KortforsyningTilingDK.

Axiell Collections 1.14.1.8250 or higher is required to be able to display this type of map.

- Another new data source is the *User activity log*, (for new *audit.inf*) which is only fully accessible to administrator users while it is read-only for normal users. Details of bulk operations performed by users and the login of users will be logged in this data source. The relevant bulk operations are importing, exporting, printing, running tasks and find-and-replace procedures (also when available operations are executed by the Axiell background scheduler service running on Collections 1.14 or higher). Administrators and other users can use the logged information to find out who performed which bulk operation when and/or when users have logged in. A new logon record (both on success and failure) will be created



automatically everytime a user logs in to Collections. The following data will be registered:

Audit log

-Audit log

**Record number** 579

**Date** 2022-05-11

**Time** 14:15:03

**Event** LoginSuccess

**User** erik

**Application** Axiell Collections

**Database**

**Record no of aud...**

**Description**

Each bulk operation will get its own record too, a search-and-replace operation for example:



Record details

Audit log

-Audit log-

**Record number** 908

**Date** 2022-06-23

**Time** 11:07:42

**Event** LogActivities

**User** erik

**Application** Axiell Collections

**Database** collect

**Record no of aud...**

**Description** Find and replace finished.

Note that the *Record number of audited record* field is meant for future use.





## 2 A summary of all minor changes

### General

- Added *Simple search* to the top of the *Standard search* form for all data sources.
- All numerical fields now use 2 decimals with padding (except for grid coordinate fields).
- The term 'Media' is now used throughout the application, instead of 'Reproduction'.
- *Management data* tab: increased length for *Input/Edit source* fields.
- For the Archive, Archive+Museum, Library and Museum applications, some setup errors have been solved regarding the accessibility of application elements.
- Obsolete application elements have been removed.

### Catalogue

- *Standard search* now includes more Library catalogue fields.
- A *Standard search* entry (access point) has been added to search the fields with person/institution names simultaneously.
- A *Standard search* entry (access point) has been added to search the fields with geographical names simultaneously.
- A *Standard search* entry (access point) has been added to search the fields with period names simultaneously.
- The field labeled *Administration name* (tag AG) has been renamed to *Department*.
- The *Title article* (tag Ta) is now always included in the *Result set*.
- On the *Recommendations | Requirements* screen tab a repeated field group *Requirements* (Type, Category, Value, Unit, Qualifier) has been added.
- The *Acquisition number*, *Date*, *Method*, and *Source* are now available in *Standard search*, both for locally stored acquisition information and for information stored in a linked Acquisition record.
- The *Acquisition (linked)* screen tab now shows more details of the linked Acquisition record (Date, Method, Source).



- The *Location history* fields have been set to non-exchangeable, so they are not copied or derived.
- The *Change locations* task now by default assigns the current date, time, and user name.
- The URI type settings of the PID fields for the metadata (3p, 3P) were switched and have been corrected.
- PID URI and URL placeholders are no longer added, since they could cause errors. In the future it will become possible to assign PIDs to records using a task.
- A new reverse link was added to exclusively link Museum and Library catalogue records to each other (for customers that do not want to include those links in the general *Related records* field group). This new link is disabled by default and only activated on specific customer demand.

## Archives catalogue

- The *Standard search* option 'Free text' has been replaced by *Simple search*.
- Added field *Barcode* (ba).
- Corrected the *Level* field tag (tag Df) in output format.
- The *Closed until* (Cu) field is now inheritable.

## Film catalogue

- Added field *Barcode* (ba) for *Item* and *Item part* records.
- Improved *Cast character* field name (cw).
- Accession fields are now displayed on a separate tab.
- Made *Work* field help texts also available for *VARIANT* fields.
- Removed FIAF element numbers from zoom screen.

## Museum catalogue

- Accession fields are now displayed on a separate tab.

## Library catalogue (general)

- The *Standard search* option 'Free text' has been replaced by *Simple search*.
- The field *Document number* (IN) is now called *Catalogue number*.



- The *Document type* (Df) field is now inheritable. For records without a broader reference a default value 'BOOK' is set on storage, to make sure the field does not remain empty.
- The *Result set* now displays the *Search year* (Ya) field instead of the free-text field *Year of publication* (yz), for better sorting of record lists on year.
- The non-working task *Print reminders* has been removed.

## Library catalogue (Work level)

- The *Management status* field (tag ms) is now available and mandatory. As in other catalogue parts, it is filled by default with 'internal'.
- The field *Institution name* (BA) is now available, only when *Management status* is not 'internal'.
- The *Level* field tag on the *Abstract and subject terms* screen tab has been corrected.
- The *ISBN Notes* (yl) field has been restored to free text.
- The *Bibliographical form* field (BV) has been restored (it was available in application version 4.5.2b and earlier).
- Removed display of broader title's *Binding method*.
- The *Hierarchical cataloguing* screen tab now displays the narrower record's *Normal location*, not *Current location*.
- Added a tab for *Normal location* fields (as replacement for the *Default shelf mark* field), and made the display of *Normal location* consistent in screens and methods. Work-level records have no *Current location* or *Location history* fields.
- (Serials/Loose-leaves): Added a tab for *Holding|Binding* fields (*Holding|Binding* fields are now available both on *Title* and *Item* level).
- (Serials/Loose-leaves): The *Subscriptions* screen tab is now only displayed when it contains data. The field names of the subscription (merge) fields have been improved.

## Library catalogue (Item level)

- Item-level records can no longer be created using the *New record* button, but only using the *Create items/copies for bibliographic Work*, which automatically links the item(s) to a work-level record and allows to assign locations.



- The field *Institution name* (BA) is now available
- The *Copy details* tab now displays more details of the parent work record (Record type, Title, Default location).
- The *Copy details* tab no longer displays the *Normal location* (aka shelf mark); both the *Normal* and *Current location* are displayed on the *Location | Future movements* screen tab.
- The *Binding method* field (ew) has been restored (it was available in application version 4.5.2b and earlier).
- The *Serial details* screen tab has been renamed to *Holding* and is now only displayed for Serial/Loose-leaf items
- The following fields are no longer supported and have been removed:
  - Loan Category fields
  - (Previous) Issue fields
  - Message fields
  - Location and Counters fields
  - Date Of Issue (eo)

## Accessions

- The *Standard search* option *Title / Description* has been replaced by *Simple search*.

## Acquisitions & acquisition proposals

- *Department* (ad): improved link & zoom screen.
- Corrected display of *Source* fields.
- Improved the *Search data for the field ...* screen tab for fields linking to Acquisition records.

## Events

- The *New record* screen is now only displayed for new records.
- Improved the *Related records* pane captions for the films related to *Manufacture events*.
- Improved the zoom screens for the different types of Event records.



## Exhibitions

- Corrected the presentation of the *Normal location* of related Library catalogue title records.

## Geographical Thesaurus

- Removed out-of-use *Term type* 'site' (LOCATION).

## Loans

- The *Administration concerned* field (AA) has been renamed to *Department concerned* and linked to *Persons and institutions*.
- It is now possible to record an object insurance value specifically related to the loan (separate from the object insurance value as recorded in the object record). The general object insurance value is taken as the initial value.
- Enriched the *Total costs currency* field (SB) with a *Search data for the field ...* screen and Zoom screen.

## Locations and containers

- The *Change locations* task now uses current date, time, and user name by default.
- The *Barcode* field (vb) is now automatically assigned a value when the record is stored and the field is still empty. Assigned values start at 1000000 and can be changed afterwards.

## Maps

- *Simple search* has been enabled.
- A spelling error in field name `layer.colour` (cl) has been corrected.

## Multimedia documentation

- Added the reproduction reference (FN) as ID in the *Gallery* view.

## Mission items

- Set this data source to be hidden by default.
- Renamed the connected database from 'request' to 'missionitem'.
- Updated and corrected the detail screen *Mission item details*.
- Added some methods.



## Missions

- Removed access rights remaining from a customer's implementation (the data source is still hidden by default).

## Persons and institutions

- Replaced domain value ADMINISTRATON by DEPARTMENT
- The field *E-mail* (C8) is no longer prefixed with 'mailto:'
- Added details screen *Supplier details*.
- Removed obsolete supplier letter and supplier language fields.

## Serial subscriptions

- Made use of Library title *Normal location* field consistent with Library Catalogue.

## Thesaurus

- Renamed *Term type* 'collection' (COLL) to 'type of series' (SERIESTYPE), since that is what it indicates.
- Removed out-of-use Term types 'site' (LOCATION), 'loan category' (LOANCAT), 'class / department' (CLASSDEP).

## Transport

- Restored *Transport reason* list value 'disposal' (DISPOSAL).

## Use of collections

- Added field *Status note* (AN).
- Added field *Priority* (PR) with values: high / normal / low
- Added a *Status history* detail screen with fields *Status* (hs), *Date* (hd), *Note* (hn), and a procedure to maintain the status history after a status change.



## 3 Selected topics

### 3.1 Reading room functionality in Collections

Model application 5.1 and up offer three new data sources (*Users*, *User categories* and *Item requests*) to support (reading room) user registration in the database itself, the registration of (reading room) user categories and the handling of the different stages of reserving, lending and returning of items in the reading room of your institution via Axiell Collections.

The databases for internal and external users and user categories are a replacement for the borrower and borrcat databases used in the outdated Adlib Library Acquisitions, Loans, and Serials modules. The users database is also relevant to Library purchase orders, and for granting access to Axiell Collections via the *Adlib database* authentication method.

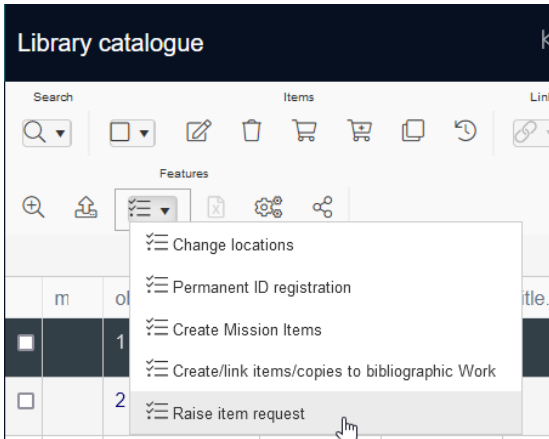
#### Abstract

To start using this functionality you'll first have to fill your *User categories* and *Users* data sources with categories and users respectively. Users are typically your coworkers and any external personnel allowed to request items and/or to process item requests in Collections. User categories specify different groups of lenders and their lending limits. Users must be linked to one of the created categories.

Note that for the Axiell 5.1 sandbox environment at <https://demosystem.adlibhosting.com/Custom Sandbox/> (in which you are invited to play around with this functionality) the user names are also used to determine who has access to this Collections environment, so if you do not have access to the application, please ask your application manager to create a user record with login details for you. If your application manager doesn't have access either, then please request a first user name for your institution via our Sales department.

After that has been done, the reading room personnel working with Collections will be able to create and process new item requests (when users come to the lending desk for a lending request) via the *Raise item request* task in either the *Moving image catalogue*, the *Archives catalogue* or the *Library catalogue* for item or file level records only (copies of books are items too).





The task opens the *Raise item request* task screen for you to enter the details of the current item request.

The 'Raise item request' form is structured as follows:

- Requester:**
  - Requester reference: [redacted]
  - Name: [redacted]
  - User category: [redacted]
  - Access to closed items: [redacted]
  - Max. no. of items/day: [redacted]
  - Max. loan period (days): [redacted]
  - Allowed destination(s): [redacted]
- Request:**
  - Requested for: [redacted]
  - Expected return date: [redacted]
  - Destination: [redacted]
- Task action:**
  - Action: raise request
- Notes:**
  - Notes: [text input field]

Buttons for 'OK' and 'CANCEL' are located in the top right corner.

Using this task will create a new record in the *Item requests* data source, so you do not do that manually in that data source.

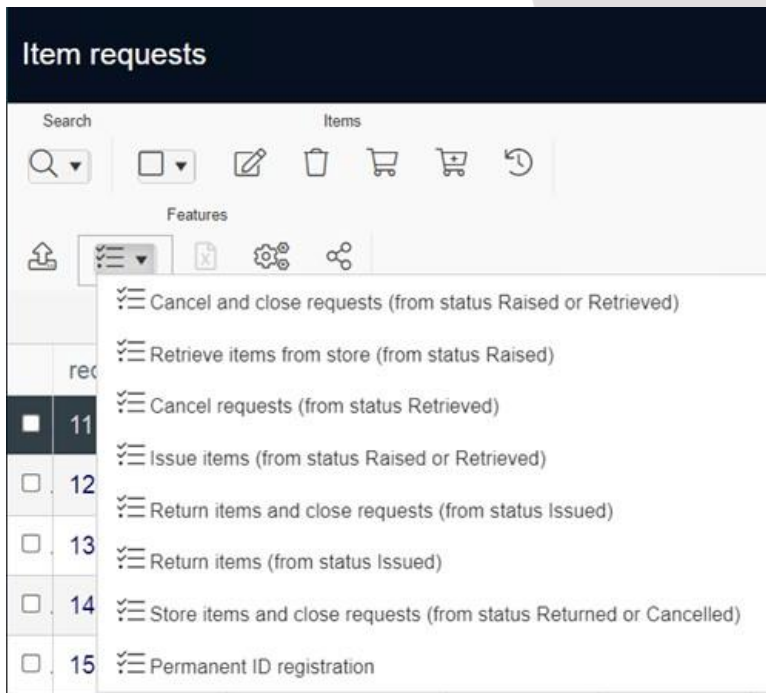
The mere creation of such a record does currently not invoke any e-mails, request slip printing or other signalling of the depot where the item must be collected, readied and brought to the lending desk, so this part must be dealt with in some other way if the lending desk is not at the depot itself: for example, it can be left to the depot employee to regularly check for new request records in Collections or the lending





desk employee may communicate with the depot in some separate way about new requests. Future development of the model application may still remedy this issue.

Once an item request record has been created, both the lending desk and the depot employees may update the request status via one of the seven tasks available for the current or the marked records in this data source (see screenshot below). So you do not edit an item request record manually to change the status, you always do that via a task so that proper checks are executed in the background and the proper fields in the item request record are updated as they should. So the whole process from request to returning and storing of an item is registered in this one item request record. A *Status history* tab in the record will show you the history of the different assigned statuses so far.

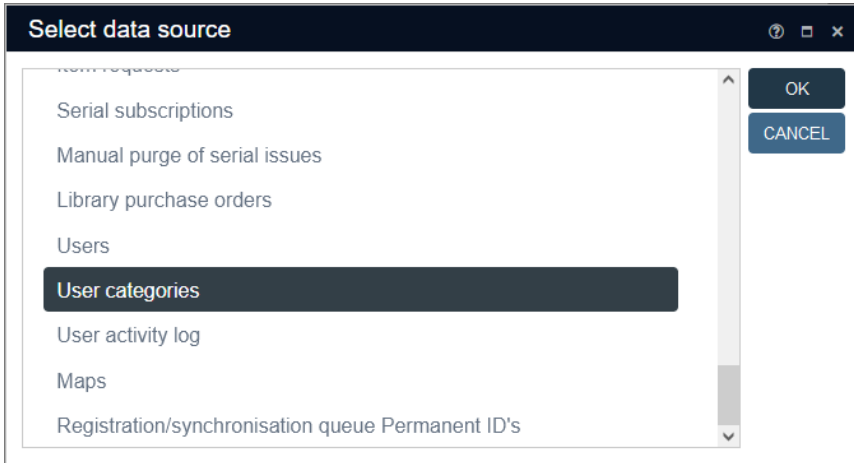


So the *Item requests* records are mainly a compact and organized way to keep track of who lends what and when. Just the communication between lending desk and depot must be handled outside of Collections at the moment.

For more details, read on.



## User categories



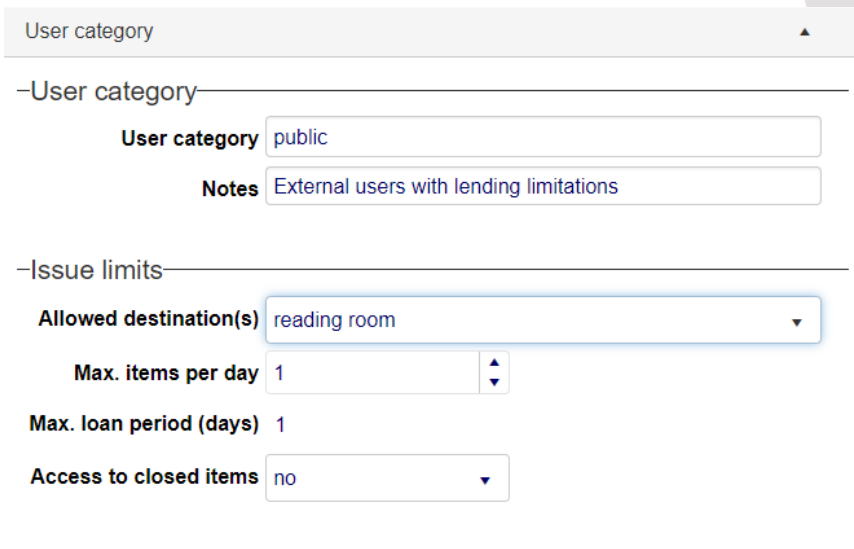
Select data source

- Serial subscriptions
- Manual purge of serial issues
- Library purchase orders
- Users
- User categories**
- User activity log
- Maps
- Registration/synchronisation queue Permanent ID's

OK

CANCEL

Typically you create a few records for your user categories first, in the *User categories* data source. A category is meant for all users with identical issue limits. So you may create one for internal staff, one for visitors and one for freelancers for example.



User category

—User category—

User category

Notes

—Issue limits—

Allowed destination(s)

Max. items per day

Max. loan period (days)

Access to closed items

At least enter the following fields:

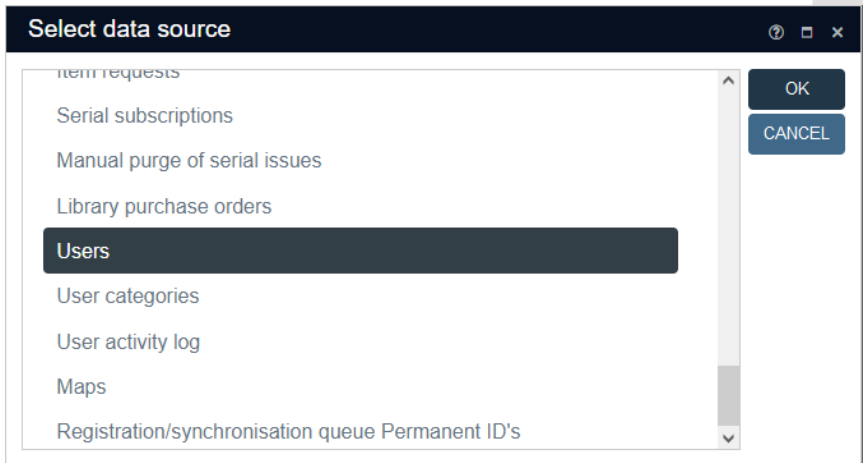
- *User category*: specify a clear, succinct name for the category.



- *Allowed destinations*: select *reading room* if the issued materials for this user category are not meant to leave the reading room. Select *reading room / with user* to allow users with this category to take items home too, if they want.
- *Max items per day*: set how many items can be borrowed per day in this category.
- *Max. loan period (days)*: this is 1 by default for the reading room (so all items in the reading room must logically be returned at the end of the day), while if the users with this category are allowed to take items home, you can change the loan period to any other number of days.
- *Access to closed items*: this refers to archival items which may have been closed after a certain date. So with this setting you specify if such closed items can still be issued within this category.

For more detailed information per entry field, open the contextual Help with the question mark icon in the right upper corner of Collections. Then, with the record in edit mode, click an entry field to display its help text in the Help view.

## Users



After creating your user categories, create a record per individual user of your application. Per user, specify at least the following details:

- *User reference*: enter some internally used unique identification number for this user, an abbreviation of the name for example. If



you have assigned users a barcode, you can enter the user ID by reading in the barcode using a barcode scanner.

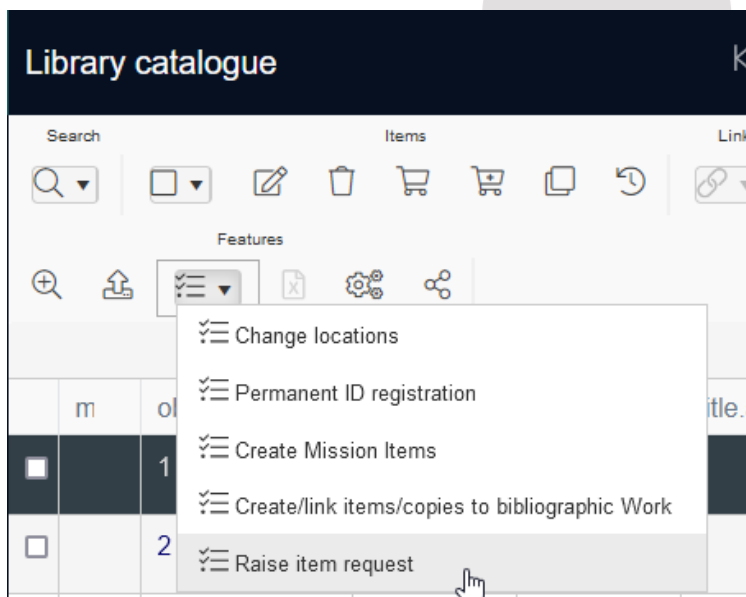
- *Activity status*: select *active* for all active users. Non-active users cannot borrow items.
- *Surname*: enter at the surname. The *Name* field will automatically be put together from the *Surname* and the other name fields when the record is saved.
- *Department*: the department where an internal user works.
- *User category*: the intended user category for this user, as specified in the *User categories* data source. The other fields in this field group will be filled in automatically, depending on the category you select.
- *Login* and *Password* (on the *Access details* tab): enter a Collections login name and password for this user (these are not the Windows user credentials), if the user must have access to the Collections application and access rights are handled via the *Users* database (as is the case in the 5.1 sandbox environment, but doesn't need to be the case in any other Collections application). However, a *Login* user name (but not necessarily a password) always needs to be entered for users who must be able to process item request in Axiell Collections, because this user name is then also used for a different purpose.

For more detailed information per entry field, open the contextual Help with the question mark icon in the right upper corner of Collections. Then, with the record in edit mode, click an entry field to display its help text in the Help view.



## Registering an item request

1. Search the *Moving image catalogue*, the *Archives catalogue* or the *Library catalogue* for the one or more **item** or **file** level records (copies of books are items too), which are requested by a user and mark them. Records of other levels cannot be issued. Note that copies of books can be created by running the *Create/link items/copies to bibliographic work* task (underneath *Features* in the *Result set* context toolbar) for a selected *Work* level record in the *Library catalogue*.)
2. In the *Result set* context toolbar, select the *Raise item request* task.



3. The task opens the *Raise item request* task screen for you to enter the details of the current item request.

The pink fields are mandatory.

In *Request reference*, select the user making the request. This is done easiest by clicking the three-stripes icon on the right side of the entry field. The other data associated with the requester is automatically retrieved and displayed once a requester has been selected.

By default, today's date is assumed as the request date, but you may still change the *Requested for* date. The *Expected return date* is always equal to the request date and cannot be changed if the reading room is the destination.

If the user category allows taking items home, then you can still change the *Destination* to *user*, after which the expected return date can be changed.

The task *Action* is set to *raise request* by default, but you may select *issue items* if the items are already at hand, ready to be issued.

Checks are performed when you click OK in the task screen, to make sure that requested items are available. You'll be notified of any errors. If the task is successful, it will create a new record in the *Item requests* data source with the appropriate status.

In the catalogue records for which you raised a request, you can find a *Reading room requests* tab which lists the current requests for this item or file. The list is ordered on the *Requested for date* column. You may have to switch records briefly to get the list to display a request that you just made.



## Further handling of a requested item

As mentioned before, the mere creation of an item request record does currently not invoke any e-mails, request slip printing or other signalling of the depot where the item must be collected, readied and brought to the issuing desk, so this part must be dealt with in some other way if the lending desk is not at the depot itself: for example, it can be left to the depot employee to regularly check for new request records in Collections or the lending desk employee may communicate with the depot in some separate way about new requests. Future development of the model application may still remedy this issue.

Further handling of any stage of the issuing, returning and closing of the request must now be done from within the *Item requests* data source.

Open the *Standard* search in the *Item requests* data source to look for specific records. You can use a number of normal access points, but at the top of the list of access points you will also find two so-called fixed queries, one to find overdue issued items (only enter an asterisk in this box and click OK), and one to find *Active requests for user* (enter a user name or user reference). Hover the mouse cursor over an access point entry field to display a tooltip with search instructions.

Search Item requests

STANDARD ADVANCED SAVED SEARCHES

Issued and overdue

Active requests for user

Request number equals

Find all overdue issued items. Type an asterisk (\*) to enable the search.

Search Item requests

STANDARD ADVANCED SAVED SEARCHES

Issued and overdue

Active requests for user

Request number equals

Destination equals

Find all items which are currently in process (i.e. retrieved or issued) for a specific user. The search field accepts user reference numbers and names. Enter an asterisk (\*) to find the active items of all users together.

Once you've found the records you are looking for you can process them further if the occasion demands for it. Both the lending desk and the depot employees may update the request status of one or more



marked records via one of the seven tasks available (see further below for their specs). So you do not edit an item request record manually to change the status, you always do that via a task so that proper checks are executed in the background and the proper fields in the item request record are updated as they should. So the whole process from request to returning and storing of an item is registered in this one item request record.

For more detailed information per entry field, open the contextual Help with the question mark icon in the right upper corner of Collections. Then, with the record in display mode, hover the mouse cursor over an entry field to display its help text in the Help view.

You can edit an item request manually too, up to a point, but try using the dedicated tasks as much as possible.

The screenshot shows the 'Item requests' interface. At the top, there is a search bar and a toolbar with icons for search, view, edit, delete, and refresh. Below the toolbar, there is a 'Features' section with icons for home, list, print, settings, and share. A table of records is visible, with a context menu open over one of the rows. The context menu contains the following tasks:

- Cancel and close requests (from status Raised or Retrieved)
- Retrieve items from store (from status Raised)
- Cancel requests (from status Retrieved)
- Issue items (from status Raised or Retrieved)
- Return items and close requests (from status Issued)
- Return items (from status Issued)
- Store items and close requests (from status Returned or Cancelled)
- Permanent ID registration

The available stages of the lending process are all optional, but each task requires a particular current status of the item request to function, as indicated in the task label.

The different statuses do not imply any registered location change of the relevant items or files either, even if an item is physically being





moved from depot to issuing desk to reading room and back, for example.

The different available tasks open with their own task screen that already contains some Help information. The *Notes* field is optional.

When returning one or more items and closing the requests at the same time, it's possible to immediately create follow-up requests for the same items and user if the destination is *reading room*, by just marking the *Raise request* checkbox in the task screen. You'll get to see some extra options: by default the new request will be for the next day, but you can change that if required. This task will create new request records.

### Return items and close requests

Click OK to return the selected items and close the requests.

This task only processes requests with a status 'issued'.

---

-Return

Notes

---

-Follow-up request

Tick the check box to also raise a follow-up request for each item.

Follow-up requests are made only after a successful return.

Follow-up requests keep the same requester and contain destination 'reading room'.

Raise request  Destination *reading room*

Requested for   Expected return date

Notes

A request can be closed when an item has been returned okay and nothing else needs to be done. Hold off on closing if something still needs to be done to the returned item.

A request needs to be cancelled (and not closed) if the item was already retrieved from storage and needs to be brought back. If the item wasn't retrieved yet, the request can be cancelled-and-closed.

A *Status history* tab in the item request record will show you the history of the different assigned statuses so far.



## Task specifications

---

**Raise item request** task in the catalogues

The *Moving image catalogue*, the *Archives catalogue* and the *Library catalogue* offer one reading room specific task: **Raise item request**. In the task screen you can select one of two actions, **Raise** or **Issue**:

### **(Selected action: Raise)**

General performed checks before action is allowed:

- Requested-for date should not be in the past
- The return date should not be beyond the max loan period (this check is currently disabled in the task adapt)
- Requester should be active
- Requester should not have overdue items
- The issue limit should not have been exceeded

Checks per item before action is allowed:

- The description level should be correct (item or file)
- The item shouldn't have been closed to the requester
- There should be no conflicting requests

Automatic actions if checks are okay:

- Creates Item request record
- Adds Notes info (when provided by user)
- Adds Raised info
- Sets status of item request to Raised

### **(Selected action: Issue)**

General performed checks before action is allowed:

- Requested-for date should not be in the past
- The return date should not be beyond max loan period (this check is currently disabled in the task adapt)
- The item should have been requested for today
- Requester should be active
- Requester should not have overdue items
- The issue limit should not have been exceeded

Checks per item before action is allowed:



- *The description level should be correct (item or file)*
- *The item shouldn't have been closed to the requester*
- *There should be no conflicting requests*

Automatic actions if checks are okay:

- *Creates Item request record*
  - *Adds Notes info (when provided by user)*
  - *Adds Raised info*
  - *Sets status of item request to Issued*
- 

**Retrieve items from store** task in the *Item requests* data source

The *Item requests* data source offers one task specific for the request status *Raised*: **Retrieve items from store**.

Checks per item:

- *Status should be Raised*

Actions:

- *Adds Notes info (when available)*
  - *Adds Retrieved info*
  - *Sets status of item request to Retrieved*
- 

The *Item requests* data source offers two tasks specific for the request statuses *Raised* and *Retrieved*: **Issue items** and **Cancel and close requests**.

**Issue items** task in the *Item requests* data source

Checks per item:

- *Status should be Raised or Retrieved*
- *Item should not be retrieved or issued on other request*
- *Requester should be active*
- *Requester should not have overdue items*
- *The issue limit should not have been exceeded*
- *The item should be requested for today*

Actions:



- Adds Notes info (when available)
- Adds Issued info
- Sets status to Issued

### **Cancel and close requests** task in the *Item requests* data source

A request can be closed when an item has been returned okay and nothing else needs to be done. Hold off on closing if something still needs to be done to the returned item.

#### Checks per item:

- Status should be Raised or Retrieved

#### Actions:

- Adds Notes info (when available)
- Adds Cancelled info
- Sets status to Closed

---

### **Cancel requests** task in the *Item requests* data source

The *Item requests* data source offers one task specific for the request status *Retrieved*: **Cancel requests**.

A request needs to be cancelled (and not closed) if the item was already retrieved from storage and needs to be brought back. If the item wasn't retrieved yet, the request can be cancelled-and-closed.

#### Checks per item:

- Status should be Retrieved

#### Actions:

- Adds Notes info (when available)
- Adds Cancelled info
- Sets status to Cancelled



---

The *Item requests* data source offers two tasks specific for the request status *Issued*: **Return items** and **Return items and close requests**.

**Return items** task in the *Item requests* data source

Checks per item:

- Status should be *Issued*

Actions:

- Adds Notes info (When available)
- Adds Returned info
- Sets status to *Returned*

**Return items and close requests** task in the *Item requests* data source

Checks per item:

- Status should be *Issued*

Actions:

- Adds Notes info (when available)
- Adds Returned info
- Sets status to *Closed*

Optional: Raise follow-up request via checkbox in task screen

General checks:

- Requested-for date should not be in the past

Checks per item:

- Requester should be active
- Requester should not have overdue items
- There should be no conflicting requests

Raise actions for option:

- Creates new reading room request for requester
- Adds Notes info (when available)
- Adds Raised info
- Sets Status of new item request to *Raised*



---

**Store items and close requests** task in the *Item requests* data source

The *Item requests* data source offers one task specific for the request statuses *Returned* and *Cancelled*: **Store items and close requests**.

Checks per item:

- Status should be Returned or Cancelled

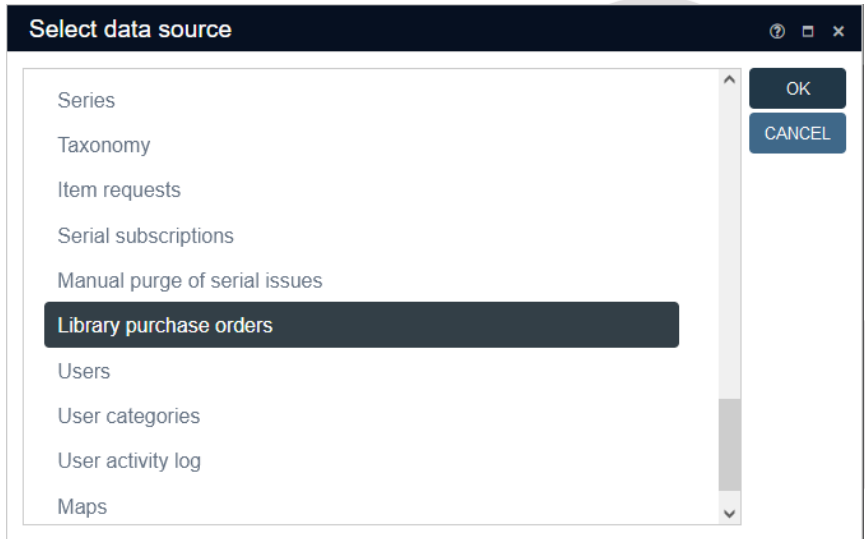
Actions:

- Adds Notes info (When available)
- Adds Stored info
- Sets status to Closed



## 3.2 Library purchase orders (acquisitions)

Model application 5.1 and up offer the new *Library purchase orders* data source, which is in fact a simplified version of the old Adlib (Library) Acquisitions module, with all the rarely used functionality (like the printing of physical letters to suppliers and most financial accounting) stripped out. The new data source allows you to register purchase orders for already registered or new library materials in an easy way.



### Abstract

You can register a new purchase order record for one or more titles at any time around an actual purchase order to a supplier. The actual order is not handled here. Here in Collections you can just register the order details to keep track of the actual order.

You can register the ordering of library titles which are already present as records in your *Library catalogue* data source in Collections or you can order titles which are not (and needn't be) registered in the *Library catalogue*.

You can link an order to an existing supplier as registered in your *Persons and institutions* data source (with the *supplier* name type) or register a new supplier while editing the purchase order record.

The requester of the order must be registered in the new *Users* data source (see chapter 3.1 for a description of that data source): you can



do that while editing the purchase order or beforehand in the *Users* data source.

Note that for the Axiell 5.1 sandbox environment at <https://demosystem.adlibhosting.com/CustomerSandbox/> (in which you are invited to play around with this functionality) the user names are also used to determine who has access to this Collections environment, so if you do not have access to the application, please ask your application manager to create a user record with login details for you. If your application manager doesn't have access either, then please request a first user name for your institution via our Sales department.

## Registering suppliers

You can link an order to an existing supplier as registered in your *Persons and institutions* data source (with the *supplier* name type) or register a new supplier while editing the purchase order record.

In *Persons and institutions* there's a separate screen tab available for *Supplier details* to enter the supplier reference number, the possible discount percentage (without percentage character), the standard delivery period in days for this supplier and the currency used by the supplier. Upon saving any purchase order record linked to this supplier, the *Delivery time* will be used to calculate the expected *Due date* when orders are placed and the *Due date* has not been filled in manually, although you can still change that automatically calculated date afterwards too.

Supplier details ▲

—Other details—

Customer number

Discount %  ▲▼

Delivery time  ▲▼

Currency  ☰





## Registering and managing a purchase order

Create a new *Library purchase order* record and fill it in as desired. The *Order form* details and *Order item* tabs are the relevant tabs.


The *Order number* can be filled in manually, or you can leave it empty to have an automatic number generated upon saving of the record. In that case, Collections will use the date notation: *yyyymmdd*, followed by a hyphen and a serial number consisting of four digits. (For each new order, this number is incremented by 1 and each day begins with 1). Thus, the order number 20220703-0003 will be the number of the third order that was entered on the third of July 2022.


Order form details ▲


---

—General details—


**Order number**

**Date**  

**Due date**  

**Supplier**  

**Supplier number** KN002

**Discount %**  

**Currency** EUR

**Delivery time (days)** 15

**Library location code**

**Message to supplier**

**Notes**

**Total amount**

Enter the *Date* on which the actual order was placed, enter an expected *Due date* or leave it empty for Collections to calculate that date when the record is saved, using the *Delivery time* registered with the linked supplier. You can still change the *Due date* later on, if required.



Link to the relevant *Supplier*. A supplier is mandatory. In the *Find data for the field* window you can also create a new supplier record and immediately link to it.

The three fields below *Supplier* are automatically retrieved from the supplier record, but you can still alter the *Discount* here if for this order a different discount applies. A discount of zero means no discount is applicable.

Further you can enter any *Library location code*, a *Message to supplier* that was conveyed with the actual order and any *Notes* pertaining to this order.

The *Total amount* is the total value of the order (for all ordered title together), including discount. This read-only field will be filled upon saving when the other relevant price fields have been filled in too.

---

On the *Order item* tab you enter the details of the purchase order and this is also where you register the receiving of items: no Adlib-like database menu tasks are required anymore. All the fields on this tab belong to a repeatable group, so you can register multiple ordered titles in this one record if the purchase order consisted of multiple titles. Just add a new occurrence to any field to repeat the field group.

Per ordered title, you can register a library title which is already present as a record in your *Library catalogue* data source or you can order a title which is not (and needn't be) registered in the *Library catalogue*. Use the *Title* field (the second entry field behind the *Title* label, the first field is the merged-in lead word field) to enter or search for an existing title. Or use the *Title (not in catalogue)* field to enter any title that doesn't need registering in the catalogue.

The *Additional data* field can be used to enter any internal notes about the ordered title, maybe its author, edition or anything else to further specify the title.

In *Quantity* you enter the number of copies of this title that you have ordered.

The *Unit price* is the price per copy.

In *Extra* you can register extra costs, like shipping and handling costs.

Also select the used *Currency* and the *Subtotal* for this ordered title will be calculated.

When you save the record, the *Status* of every ordered title will become *On order* if this is a new record and it will change to *Received* for a title once all ordered copies of that title have been received and



registered as such in this record. After cancelling an ordered title, its status will become *Cancelled*.

When you have received item from the order, you register the amount received in *Receive now* (you could even do that when you register this record for the first time). Your *Receive now* entry will be processed once you save the record. The previously received amount will be shown in the read-only field *Already received* while the number of copies still to be received can be found in the *Still expected* field. Once all items of the entire order have been received, the *Status* will become *Received*.

Order item ▲

---

–Order item–

**Status**

**Title**

**Title (not in catalogue)**

**Additional data**

**Quantity**  ▲▼

**Unit price**  ▲▼

**Extra**  ▲▼

**Currency**  ☰

**Rate** 1

**Subtotal (incl. discount)** 36.00

**Receive now**  ▲▼

**Already received**

**Still expected**

**Fully paid**  ▼

**Invoice no**

**Cancelled?**  ▼

**On**  📅



Further you can register the invoice number and whether it was already fully paid or not, but this is purely as a note for internal use: it has no consequences elsewhere.

If you had to cancel an ordered title, you can register that in the *Cancelled?* field and the date in the *On* field. The status for this title will change to *Cancelled*.

The *Requester* of this ordered title must be user from the Users data source. New users can be registered here in the *Find data for the field* window too.

If you have notified the requester or the order of the received items, then you can register the date in *Requester notified on*. Notifying the requester must be done outside of Collections.

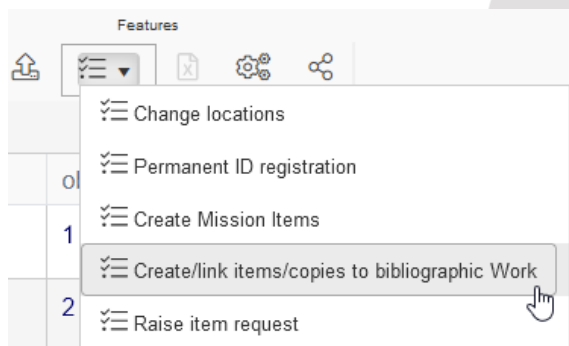
Register any notes about the received item in *Item note*.

## Registering the received copies

In 5.1, titles are registered in the *Library catalogue* as record type *Work*. Copies are registered in there as well, as record type *Item*. Between a title (*Work*) and its copies (*Item*) a parent/child relation must exist.

So after receiving items from a purchase order for a title already present in your catalogue, you will want to create *Item* records and link them to the relevant *Work* record. This can be done very easily in 5.1:

1. Just search your *Library catalogue* for the title record you'd like to add copies to and select it in the *Result set*.
2. Then select the task *Create/link items/copies to bibliographic Work* in the *Result set* context toolbar.



3. The task screen opens. Enter the *Number of items/copies* for which you'd like to create *Item* records.

Create/link items/copies to bibliographic Work

-Number of items to create-

Number of items/copies 1

-Item/Copy number-

Collections will automatically generate item/copy numbers.  
Only when a single item is created, (optionally) assign its item/copy number here.

Copy number

-Item title-

Leave the item details fields empty to inherit the data from the bibliographic work.

Title

-Item location-

The work's normal location is also assigned to the items, unless specified otherwise.  
Optionally assign a new normal location (no containers).

Do not copy the normal location from the bibliographical work  
 Assign the normal location as current location as well.

-Notes-

Add a note to all of the created items (optional).

Notes

OK  
CANCEL

If you're just creating a single *Item* record, you can enter a copy number for it manually (or use a barcode scanner to scan the number from a barcode), but you don't need to: Collections can generate new copy numbers for all created *Item* records: then leave the *Copy number* field empty.

If you want the *Item* records to have the same title as the currently select *Work* record, then leave the *Title* field here in the task screen empty, otherwise fill in a different title: the first entry field is meant for a lead word, the second for the rest of the title. The *Normal location* of the *Work* record will be assigned to the *Item* records too by default, as their *Normal location*. The *Current location* of the *Item* records will be left empty by default. You can change this behaviour by marking either or both of the *Item location* checkboxes. If you mark *Do not copy the normal location from the bibliographical work*, you'll get to see some extra fields allowing you to enter a different *Normal location* for the *Item* records (or use a barcode scanner to scan the location from a barcode).



-Item location-

The work's normal location is also assigned to the items, unless specified otherwise.

Optionally assign a new normal location (no containers).

Do not copy the normal location from the bibliographical work

Normal location

Barcode

Location context

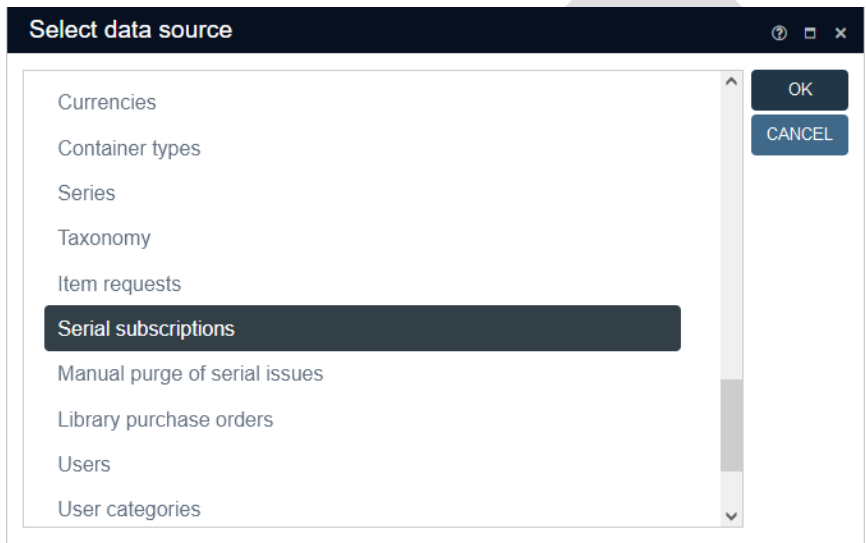
Assign the normal location as current location as well.

4. After clicking *OK* in the task screen, the *Item* records will be created and linked to the *Work* record, and a *Task summary* will be displayed.



### 3.3 Serial subscriptions and issues management

Model application 5.1 and up offer the new *Serial subscriptions* and *Manual purge of serial issues* data source, which constitute a simplified version of the old Adlib (Library) Serials module, with all the rarely used functionality (like the printing of physical letters to suppliers, distribution lists and most financial accounting) stripped out. The new data sources allow you to register your subscriptions to serial publications and manage the received issues.



#### Abstract

You can register a serial subscription to a serial title which is already present in your *Library catalogue*, at any time before or after actually subscribing in real life. Actually subscribing to a serial (its communication and payment) must be done outside of Collections. Here in Collections you can just register the subscription details, register a renewal or cancellation of the subscription and book received issues to keep track of the subscription.

You can link a subscription to an existing supplier as registered in your *Persons and institutions* data source (with the *supplier* name type) or register a new supplier while editing the serial subscription record.



## Registering suppliers

You can link a subscription to an existing supplier as registered in your *Persons and institutions* data source (with the *supplier* name type) or register a new supplier while editing the purchase order record.

In *Persons and institutions* there's a separate screen tab available for *Supplier details* to enter the supplier reference number, the possible discount percentage (without percentage character), the standard delivery period in days for this supplier and the currency used by the supplier. The *Discount* percentage and the *Delivery time* are used for *Library purchase orders*, not for *Serial subscriptions*.

Supplier details ▲

---

—Other details—

Customer number

Discount %  ▲▼

Delivery time  ▲▼

Currency  ☰

## Registering a subscription

You can register a serial subscription to a serial title which is already present in your *Library catalogue*, at any time before or after actually subscribing in real life. Actually subscribing to a serial (its communication and payment) must be done outside of Collections. Here in Collections you can just register the subscription details and book received issues to keep track of the subscription.

A subscription is mainly registered on the *Subscription details* tab. An internally used, unique *Subscription code* (a short title for example, maybe including an abbreviation for the supplier) and the *Title* are mandatory: link to an existing serial title from your *Library catalogue*. If the title doesn't exist in the catalogue yet, then create it in there first, with document type *Serial* and record type *Work*.

Then enter the other subscription details as far as you know them.





## Subscription details

### -Title data-

**Subscription code** AX

**Title** [Axiell Newsletter](#)

### -Subscription details-

**Start date** 2022-01-03

**End date**

**Frequency**

**Issues per** month

**Supplier** [Axiell](#)

**Subscription number** AXNL

**Number of subscriptions** 1

**Price**

**Currency**

**Remarks**

*Start date /  
End date*

The *Start date* is the date on which the subscription starts (or has started). You can leave the *End date* empty if you don't know yet when the subscription will end.

*Frequency /  
Issues per*

With the values you enter or choose here, you indicate the edition frequency of the serial. If you don't know the frequency of appearance for this serial, e.g. because it appears irregularly, then



select the maximum period there may be between two issues.

Always use the smallest time unit, e.g. *1 issue per week* rather than *52 per year*, and *1 per month* instead of *12 per year*, etc.

For a daily, fill in how many times a week it appears, e.g. 6 issues per week.

<i>Supplier</i>	Enter the supplier's name. This field is linked to the <i>Persons and institutions</i> database.
<i>Subscription number</i>	Enter the subscription number that your supplier gave you for this serial. This subscription number is referred to in correspondence about this serial for the supplier.
<i>Number of subscriptions</i>	Enter the number of copies you will be receiving of each issue.
<i>Price</i>	Enter the subscription price of the serial. This price is not used in any financial processing.
<i>Currency</i>	Enter the currency code for the amount.
<i>Remarks</i>	Enter any comments about this subscription.

Read-only information underneath *Last received issue* will automatically appear once issues have been booked.

Underneath *Administrative details* you can specify the order details, a renewal or cancellation and a purge policy for old issues.


<i>Ordered on</i>	Enter the date on which the order for the subscription was placed.
<i>Order number</i>	Enter your order number of this serial.
<i>Renew/cancel</i>	If you wish to cancel your subscription to this serial, select <i>Cancel</i> . To renew your subscription, select <i>Renew</i> . If you neither want to cancel nor renew the subscription, or you don't know yet what you want to do with the serial, then select <i>No action</i> from the drop-down list or leave the field empty. Cancellation or renewal letters must be created outside of Axiell Collections

<i>Before</i>	Enter the date by which notice of renewal or cancellation must have been sent.
---------------	--




- Renewed on*            If renewed, enter the date on which the subscription was last renewed.
- Cancelled on*         If cancelled, enter the date on which the subscription to the serial was cancelled.

—Administrative details—

Ordered on  

Order number


Renew/cancel  

Before  


Renewed on  

Canceled on  

Purge policy for old issu...  

After how many months ...   

—Purged issues log—

Purge history log	Date
<input type="text" value=""/>	<input type="text" value=""/> 

## Booking received issues

On the *Booking* screen tab of a *Serial subscription* record, you can check in newly received issues. If you are registering a new subscription, then only fill in the fields in the *Next expected issue* field group: the fields in the *Issues* list will be filled in on receipt of an issue only.

Although you can enter data in fields of the *Issues* field group manually, it's easier to fill in the *Next expected issue* details and work from there.

To check in a received issue, then simply click the *Insert occurrence for new issue?* checkbox, to insert a new field group occurrence at the top of the *Issues* list with most data filled in correctly already: the details from the *Next expected issue* will have been copied to the new occurrence and the details for the new *Next expected issue* will have been recalculated automatically using the issuing frequency. You'll maybe only have to enter the *Issue name* manually: however, when



the *Issues* list is long enough and it already contains an *Issue no.* from a previous year that's now come up as the *Next expected issue* number, then its *Issue name* will be copied along too, so to make your work easier you should set your purge policy to two years minimally.

Subsequently you'll only have to enter the number of copies which you received of this issue up till now, in the *Received* field of the new field group occurrence in the *Issues* list. In *Copies* you can see the total number of copies to be expected, while in *Due* you can see the number of copies currently still expected; this field will be recalculated when you leave the *Received* field. (In *Received*, do not enter a higher number than *Copies*.) The *Date received* can of course be adjusted, if the issue hasn't been received today.

Save the record to store the changes you made.

For a deviating received issue, you can always insert an *Issues* field group manually and fill it manually, so you're not stuck to the automatic way.

Booking ▲

---

–Next expected issue–

Volume	Issue no	Issue name	Year	Expected on
<input type="text" value="5"/>	<input type="text" value="5"/>	<input type="text" value="May"/>	<input type="text" value="2022"/>	<input type="text" value="2022-05-13"/>

---

–Missing issues–

**Remarks**

---

–New issue?–

**Insert occurrence for ne...**

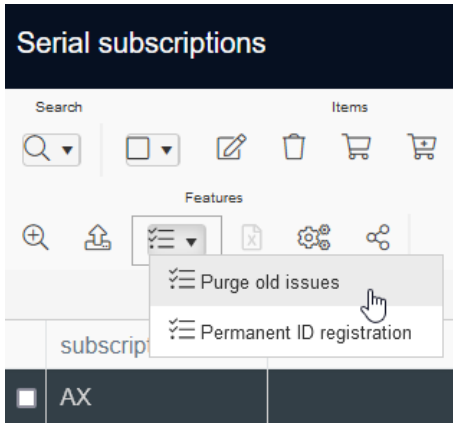
---

–Issues–

Volume	Issue no.	Issue name	Year	Copies	Received	Due	Date expected	Date received
<input type="text" value="5"/>	<input type="text" value="4"/>	<input type="text" value="April"/>	<input type="text" value="2022"/>	<input type="text" value="1"/> ▲▼	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="2022-04-13"/>	<input type="text" value="2022-04-14"/>
<input type="text" value="5"/>	<input type="text" value="3"/>	<input type="text" value="March"/>	<input type="text" value="2022"/>	<input type="text" value="1"/> ▲▼	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="2022-03-13"/>	<input type="text" value="2022-03-13"/>
<input type="text" value="5"/>	<input type="text" value="2"/>	<input type="text" value="Februari"/>	<input type="text" value="2022"/>	<input type="text" value="1"/> ▲▼	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="2022-02-13"/>	<input type="text" value="2022-02-13"/>



## Purging old issues



Since you probably don't want old issues to be registered in these subscription records indefinitely, you can remove old issue details from these records. You can do that manually via the *Manual purge of serial issues* data source or semi-automatically by running the *Purge old issues* task for the selected or marked *Serial subscription* records. A purge log file will be created either way and linked in the *Purge history log* field. The task will use the purge policy that you've specified in your *Serial subscription* records, at the bottom of the *Subscription details* tab, to purge all relevant issues.

### *Purge policy for old issues*

Enter the policy according to which old issues are to be semi-automatically purged. You can choose between:

- *Do not automatically purge* (default): old issues are never purged when the task is started. They will have to be purged manually via the *Manual purge of serial issues* data source.
- *Move old issues to the holding*: if issues of this serial are found during automatic purging that are older than the number of months entered in the next field, these issues will be removed from the current record. The details of these issues will be combined and added to the holding data according to the format: *Vol. <from Volume> (<Year>) no. <Issue no.>* - *Vol. <up to and including Volume> (<Year>) no. <Issue no.>*, so for instance *Vol. 14 (2005) no. 1 - Vol. 15 (2006) no. 12*, and added in a new occurrence at the top of the *Holding* field on the *Holding | Binding* tab of the serial title record in the *Library catalogue*.



- *Remove old issues*: if issues are found during automatic purging that are older than the number of months in the next field, they will be removed. The holding will not be adjusted.

*After how many months should old copies be purged?*

If you selected *Move old issues to the holding* or *Remove old issues* in the previous field, then you can specify after how many months this can be done. Issues older than the number of months stated here are removed during automatic purging and, if required, moved to the holding.

The *Manual purge of serial issues* data source (which accesses the serial subscription records too) allows you to do just that. Simply look up the subscription record you'd like process, put it in edit mode and in the *Issues to be purged* list, mark the issues to be removed from the subscription record. Save the record and the issues will be removed without changing the holding, but a purge log file will be created and linked in the *Purge history log* field along with the creation *Date*.

-Issues to be purged-

Delete	Volume	Issue no.	Issue name	Year	Copies	Due	Date expected	Date received
<input type="checkbox"/>	5	1	January	2022	1	0	2022-01-03	2022-07-12
<input checked="" type="checkbox"/>	5	2	Februari	2022	-1		2022-07-13	2022-07-13

