adlib
serials

module guide

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Contents

1. Introduction

1.1. What is Adlib?

Adlib is not only the name of our company but we also use it to denote our computer programs, with which you are able to manage large quantities of information in a structured manner.

There is a difference between the Adlib software (programs) and the applications. The **software** contains all code that deals with reading and writing in databases, and all accompanying functionality, and is executed in files with the extension .exe and/or .dll (and some peripheral functionality in bin files). This software has been designed especially for the management of data from libraries, museums, archives and similar institutions.

The Adlib **applications** consist of databases and user interfaces (tab sheets with fields, for instance) – really only a collection of data – of which the software creates a usable program.

This structure makes it possible for you to install new software regularly, which contains new functionality, while nothing changes in your application (which you may have customized yourself). That is why your software can be upgraded regularly to a new version number (e.g. 6.5) when you install a new release, whilst your application version always remains the same (e.g. Museum 4.2).

Adlib is structured much like a card tray, with related data (e.g. from a subscription) being stored together. In Adlib however, the equivalents of cards are called records. A collection of records is referred to as a database rather than a card tray, and a subset (partial collection) of a database a dataset. In an application you can fill or edit such a database or dataset.

Data is entered and per subject presented on forms on screen tabs, but is part of one and the same record.

So called indexes are used so that data can be retrieved as quickly as possible; indexes are alphabetical or numerical lists of terms with a link to the record in which such a term occurs. You can search and sort, display, print and/or store the results in different ways.

> Adlib has an exceptionally flexible structure. With Adlib Designer, the system can easily be adapted to meet customers' wishes and requirements. For example, customers can themselves choose what data is to be stored, and how the data is to be displayed. You can also choose for which data indexes are to be made, and in what way these indexes are to be

made accessible. (There is separate documentation available
for Adlib Designer.)

When you buy Adlib software, you'll also get one or more applications,
depending on your licence. An application is sometimes subdivided
into various modules, each of which represents a separate aspect of
the activities in your library. Adlib Library is released as a standard-
ized application. Each application minimally contains a module to de-
scribe materials from the catalogue and search for those descriptions.
Extra modules may have been added, for instance for extensive sub-
scriptions management, and a module that visitors to the library can
use to search the catalogue, and/or a module to register acquisitions.
These and similar modules are extra, and have to be purchased sepa-
rately from the catalogue module.

1.2. About this user guide

In this manual we assume you are familiar with the Adlib software. If
you are not, we advise you to read the general Adlib User Guide for
information about the functionality of the Adlib software, such as
searching, using menus, entering data, and editing and printing.
The module guide before you describes some specific aspects of the
Serials module for Adlib Library, that need further explanation. See
the contextual help in the application itself (**F1**), for a description of
the fields; a number of fields though, will also be discussed in this
guide.
Although this module can be used as a stand-alone application as
well, in this manual we assume that you use the module as a compo-
nent of the integrated Library application.
This manual was written for application version 4.2 or higher. Howev-
er, since small variations may exist in and between application ver-
sions, it is possible that for example the fields and/or screen tabs dis-
cussed here are not present in your application, or that fields are lo-
cated on a different tab. For application version 3.5 or older we refer
you to the *Serials module guide 3.5*.

To distinguish between descriptive text and text that you see on
screen, different typefaces have been used.

- Text that is displayed on screen and used in menu titles and on
  buttons is in italic type, e.g.:
  Full catalogue
  Combine
  Next

- Text that you type in yourself is printed in monospace type, like that produced with a typewriter, e.g.:
  ```
  You typed this yourself...
  ```

- Keys on your keyboard are indicated with a wide, bold font, corresponding with what is printed on the keyboard, e.g.:
  Enter
  Page Down
  F1 (Help)
  Sometimes, you have to press two keys 'simultaneously'. This is indicated by a plus character between the two key names. In this case, you should press the first key and then the second key, keeping the first key pressed down, e.g.:
  Ctrl+C

Remarks and warnings are printed in a frame like this, or just as an indented paragraph.

The way screen shots in this manual are displayed might differ from the display on your own monitor, depending on your Windows version and monitor screen resolution.

2. Purpose and integration

2.1. Purpose and functionality of the module

With the Serials module you can expand your Library application to register and manage subscriptions to serials and loose-leafs, and to process the circulation of copies.

This module supports the following procedures (amongst others):

* creation of subscriptions;
* registering new titles;
* checking-in of issues (on receipt);
* monitoring of circulation;
* handling of returns;
* renewal or cancellation of subscriptions;
* handling of payments;
* printing of letters.

And of course, in this module you can use all functionality that is available to you in every Adlib application, for instance for advanced searching via the search language, or for printing with the *Print wizard*.

2.2. From Serials module 3.5 to 4.2

With the transfer to version 4.2, Adlib Serials 3.5 has received a substantial upgrade, of which the most important aspects are that:

* each subscription is now registered in its own record in a database named SUBSCRIP;

* subscriptions on loose-leafs are kept separate from subscriptions on serials;

* in the DOCUMENT database just bibliographical data is still stored (among which that of serials and loose-leafs);

* distribution lists and letters to suppliers can be printed to Word templates from now on, which has improved the layout;

* letters to suppliers can be created in the language of the supplier, and may be printed as well as be sent by e-mail;

- the address and personal details of readers can be registered more extensively;

- the general operation of the application has become more user-friendly.

So, in Adlib Serials 4.2 you mainly register and manage subscriptions. The bibliographical data of serials and loose-leafs can still be viewed, and you can also quickly create a new title, but the separation has been made clearer: titles are registered best in Adlib Library and the subscriptions to them in Adlib Serials.
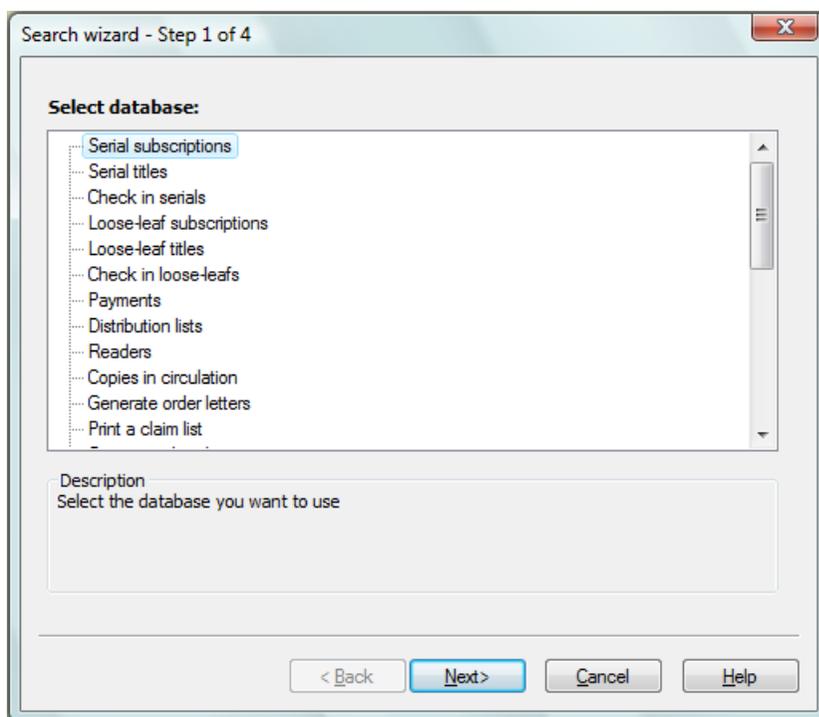
2.3. Data sources in Adlib Serials

Figure 2.1: Some of the available data sources and print procedures.

A data source in an Adlib application is a reference to a database or dataset. The available data sources in an application are displayed in *Step 1* of the *Search wizard*, where you'll also find some specific print procedures. The following data sources are present in Adlib Serials:

- In *Serial subscriptions* and *Check in serials*, you register your sub-scriptions and check in received copies. (Both data sources offer the same screens, but display them in a different order.) In *Loose-leaf subscriptions* and *Check in loose-leafs*, you do the same for loose-leafs.

- In *Serial titles* and *Loose-leaf titles*, you can view and/or enter a selection of bibliographic data of titles. The second screen offers a quick overview of all current subscriptions to a title.

- In *Payments* you book in the payments on subscriptions, to the desired cost centres.

- In *Distribution lists* you define reader lists. Those lists can be linked to subscriptions via the subscription records. As soon as you book in a new issue, automatically the proper distribution lists will be printed.

- In *Readers*, you register personal details of readers.

- In *Copies in circulation* you can find out which issues are currently in roulation and in who's possession they are.

- The *Generate order letters*, *Print a claim list*, *Generate claim let-ters*, *Generate renewal letters* and *Generate cancellation letters* options do not represent databases, they start print procedures. You generate letters with them. Only *Print a claim list* directly sends output to the printer, with the other options Adlib exports the data to Word templates. The resulting documents will be opened in Microsoft Word, where you may edit them before you actually print them.
  Note that for each of these options, certain settings in the sub-scription records must have been made. For instance, if you choose *Generate order letters*, Adlib will search for subscriptions in which the *Create order letter?* field has been set to *Yes*. And claim letters are only generated when issues are overdue or when ordered subscriptions haven't arrived yet.

- In serial subscription records you can link to scanned tables of contents and enter readers to whom those documents must be sent by e-mail. Use the *Send scanned contents* option to automat-ically send all still to process e-mails at once.

- When purging issues, you delete check-in data of old issues. With *Automatically purge issues*, removal is automatic, following the purge policy which you set per subscription. A summary of the de-leted data is copied to the *Holding* field on the *Copies and shelf marks* tab in the *Serials* data source in the Library application. With *Manual purge of issues/sets* you must search for subscription

records to be purged, after which you can indicate per issue or set whether it should be purged or not. In this case, removed data is copied to a text file.

- In *Persons and institutions (contains suppliers)*, you register institutions, companies, customers, contacts and suppliers, but no readers. If you register a supplier, you can provide additional data on the *Supplier details* screen tab, like the language in which the supplier must be contacted, and the letters which could be sent to this supplier. You can also indicate whether communication with the supplier should proceed through letters (on paper) or via e-mail.

- The *Thesaurus*: only a couple of fields are validated against this database, but it is always handy to be able to edit or delete terms that you added in the past.

- In *Cost centres* you define budgets, and in *Payment history* expenditures and commitments per cost centre are kept up-to-date for you.

- In *Currencies* you define currency units and exchange rates, to be used with foreign suppliers.

- In *Letters* you can find records which hold standard texts for letters to suppliers. These texts will only be used if Adlib cannot find the Word templates for letters. So normally speaking, you only need to adjust the texts in the Word templates to make them relevant to your situation.

- In *Languages*, you have to provide translations for all labels used in letters to suppliers, in every language in which you may want to send those letters (if those translations are not present yet). These translations are also used when printing to Word templates.

- In *Layout distribution list* you'll find one record in which you can make some print settings in case you are not going to print distribution lists to Word templates. However, by default distribution lists are now printed to Word templates, and these settings won't be used.

- In *Charging details* you decide whether reader or serial budgets must be used, and the standard cost centre for them.

2.4. Relations

The Serials module is one of the integrated modular components of the Adlib Library application. Aside from the catalogue management offered by the main application, you may also use modules for acqui-

sitions, loans and the public access catalogue. These modules and applications are linked to each other on database level. This means for example that your data-entry in Serials is validated against the thesaurus in your application, where necessary, and that existing titles, suppliers and readers can be retrieved quickly by means of diverse characteristics.

The most relevant relations are as follows:

- The *Serial subscriptions*, *Check in serials*, *Loose-leaf subscriptions*, and *Check in loose-leafs* data sources all refer to the SUBSCRIP database. In here, you register subscriptions. In a subscription record you link to a title in the catalogue (the DOCUMENT database); multiple subscriptions can link to the same title record. In Adlib Library too, in the detailed display of a serial title or loose-leaf title, a separate screen tab displays which subscriptions exist for it. And in a zoom screen you can view detailed data per subscription.

- The *Serial titles* and *Loose-leaf titles* data sources point to the DOCUMENT database. Titles which you register in here or retrieve from it, are accessible in Adlib Library as well, in the *Serials* and *Loose-leafs* data sources underneath *Full catalogue* since those refer to the same database. So you decide from which application/module you enter titles into the database.

- The *Readers* data source refers to the same database (BORROWER) as the *Borrowers* and *Requesters* data sources in the Loans and Acquisitions modules, respectively. Therefore a name and its details, which have been registered in this database, can be retrieved in all modules quickly.

- The databases to which the secondary data sources *Persons and institutions (suppliers)*, *Cost centres*, *Payments*, *Currencies*, *Letters*, *Readers* and *Languages* refer, are shared with the Acquisitions module.

3. General operation

Your work with the Adlib Serials module will proceed most efficiently if you follow the steps below in the given order:

1. When you first start working with the Serials module, you'll have to fill the secondary files (supplier details, cost centres, etc.). You need these supplementary files in order to manage subscriptions and to be able to check in issues.

2. Once step 1 has been completed as much as possible, you can start adding serials and loose-leafs (if those are not yet present in the catalogue). To this end, open the *Serial titles* or *Loose-leaf titles* data source from the first window of the *Search wizard*, and create new records in it. This job can of course also be done in Adlib Library: there you'll be able to enter more details.

3. Then register you subscriptions in the *Serial subscriptions* and *Loose-leaf subscriptions* data sources.

4. For new subscriptions you may want to print an order letter, using the *Generate order letters* option in *Step 1* of the *Search wizard*.

5. When issues of serials or sets of loose-leafs arrive, you can check them in using the *Check in serials* data source, respectively *Check in loose-leafs* data source in the first window of the *Search wizard*. A distribution list will automatically be printed for every serial issue that has been checked in, after you save the edited subscription record.
   You can keep track of copies in circulation, using the *Copies in circulation* option, also in *Step 1* of the *Search wizard*.

6. Using the *Print claim list* option, you can check whether it is necessary to send claim letters for copies or sets.
   If one or more copies or sets fail to arrive by the expected date, you can print claim letters for the relevant suppliers via the *Generate claim letters* option.

7. Payments for subscriptions can be viewed and edited using the *Payments* option in the *Search wizard*.

8. You can batch print renewal or cancellation letters for subscriptions which you indicated to be renewed or cancelled.

9. Finally, you can clear up the receipt history (by purging old issues or loose-leaf sets), either manually or automatically.

4. Filling the secondary files

After installing the Serials module into your Library application, and before you start processing subscriptions and circulations, you must first fill the secondary files (the data sources *Persons and institutions* up to and including *Charging details*, plus *Distribution lists* and *Readers*) as much as you can with standard data from your accounts, if that hasn't been done already.
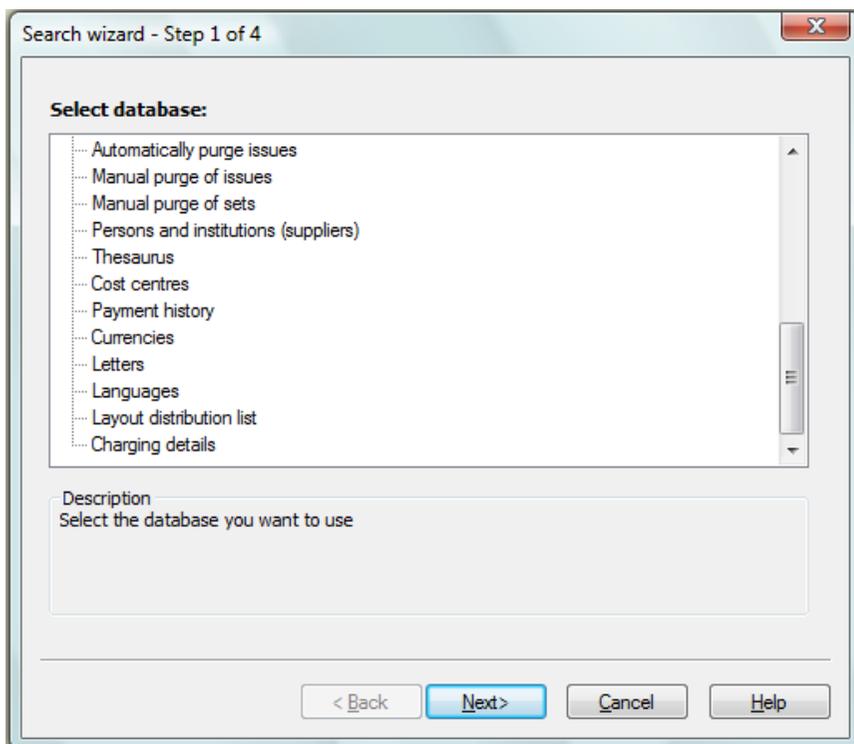

Figure 4.1: Fill the secondary files first.

4.1. Persons and institutions (suppliers)

In *Persons and institutions (suppliers)*, you register institutions, companies, customers, contacts and suppliers, but no readers. If you register a supplier, you can provide additional data on the *Supplier details* screen tab, like the language in which the supplier must be con-

tacted, and the letters which could be sent to this supplier. You can also indicate whether communication with the supplier should proceed through letters (on paper) or via e-mail.

The suppliers which you enter here are the same suppliers as used in the Acquistions module. So you need to register those only once. Before you enter new suppliers, first check whether the supplier isn't already known in the database.

Figure 4.2: Choose supplier *as* Name type*.*

If you are going to register a supplier in *Persons and institutions (contains suppliers)*, then in the new record first select *supplier* in the *Name type* drop-down list on the *Name information* tab. After making that choice and leaving the field, a number of default values is automatically entered on the *Supplier details* tab (so that you don't have to do that manually anymore). On this tab you may continue to complete the details of the supplier, and possibly link to other letters to be used.

Customer number   In this field you can enter a number/code given to you by this supplier.

Discount %   *Discount* stands for the standard discount rate you get from the supplier. This percentage is taken into account when ordering material from this supplier, but can then still be adjusted manually for that specific order.

Delivery time   In this field you can indicate the standard delivery term of the supplier in days. This is used to calculate the standard expectation date of orders, which is also used for claims. This date can still be changed manually during ordering, if necessary.
The default *Delivery time* value is retrieved from *seracq#.txt* files, line number 26. If you wish to get a default delivery time different from 30 days, you may adjust this number in said text files. But you can adjust the entered delivery

> time manually (in the field) as well, of course.
> The other fields offer the same flexibility.

Figure 4.3: The Supplier details *tab.*

Language   In *Language*, you can indicate in which language changeable texts (the headings for fields, e.g. *Title:*, and *Our reference*:) in the letters to the supplier are to be written. This is independent from the fixed texts (salutation, body text, closing) in the letters which you link to this supplier.

By default, the *Language* in which the supplier needs to be contacted, is set to the current interface language of your Adlib application, direcly after selecting the *supplier* name type. This is a linked field to the *Languages* database, which means that you can only pick languages for which a *Languages* record exists; although you may create a new *Languages* record for a new language instantly. That record must hold translations of field labels which can be used in letters to suppliers. So it is important that a fully translated record is, or will be present in the *Languages* database, for the language of a supplier.

The names of the letter templates in the *Letters* box

are automatically put together for you by adding the supplier language to a default partial name in English. If you select another language and leave the *Language* field, Adlib will ask you if you'd like Adlib to automatically re-adjust the names of the letter templates to be used. Choose *Yes* if you use the default templates present in your Adlib application: each language has its own templates because the fixed texts in it are in a different language.

Currency   Here, enter the currency to be used for the supplier, for example GBP for British pounds. These currencies have been, or should be, registered in the *Currencies* data source. In the current field, press **Shift+F4** to search that database, or to create a currency in there. If you leave this field empty, a default value will be filled in when you save the record.

Letters   In the *Letters* field group you can indicate which letters are to be used for this supplier. By default, letters are printed with the aid of Word templates, although it's equally well possible to print without templates.
        When letters are printed (via *Step 1* of the *Search wizard*) the supplier name is used to retrieve and print the appropriate letters.
        The names of the letter templates in the *Letters* box are automatically put together for you by adding the supplier language to a default partial name in English. If you select another language and leave the *Language* field, Adlib will ask you if you'd like Adlib to automatically re-adjust the names of the letter templates to be used. Choose *Yes* if you use the default templates present in your Adlib application: each language has its own templates because the fixed texts in it are in a different language.
        Only if you've created your own templates with entirely different names, which is allowed too, you probably don't want your manually entered letter template names to be replaced by default names, if you happen to change the supplier language. Then choose *No* if Adlib asks for a confirmation of the replacement.
        Note that the standard templates can be found in the Adlib folder *\Worddoc\templates*. You may adjust their fixed texts and layout to your liking. Do make

sure that you leave the special codes in the templates intact. Remember to save any adjusted templates with the *.dot* extension.

Processing of letters

The *Processing of letters* field is set to *Print to document* by default. This means that the above entered templates will be used, and that the letters will be created in MS Word, from where you can print them. If you don't want or can't print letters via Word templates, then move the Word templates to another folder. Adlib won't be able to find the templates, and will search the *Letters* database for records with the names of the letter templates you entered or agreed with. By means of the fixed texts in those records, letters will be printed to the printer directly.

The other processing option is *Send by e-mail*. You can only set this option if you provide an e-mail address* for the supplier on the *Name information* tab. Another requisite is that your sender address and the name of your SMTP server must have been set in line numbers 278, respectively 192, in *adlib#.txt* files. A copy of every e-mail is sent to your sender e-mail address, so that you have proof of sending the e-mail. Records from the *Letters* data source provide the fixed texts in the e-mail letters: these records have the same names as the letter templates listed for the supplier. So check and customize all *Letters* records with the template names used by you, before you start e-mailing letters. Note that if you do not use the default template names, you must create *Letters* records with your custom names, if you want to be able to e-mail letters (or if you want to be able to print without Word templates).

* If you enter a valid e-mail address in the *E-mail* field, then after saving the record, *mailto:* is automatically placed in front of it, and the address will be underlined. It's possible to click the underlined address to open your e-mail program and write and send an e-mail immediately, but you don't need this functionality to send automatic letters (orders, claims, renewals and cancellations).

4.2. Cost centres

The *Cost centres* data source contains the name of, and budgetary totals for a specific cost centre. A cost centre may be a department, or it can be used to control the budget for one specific material. This database is shared with the Acquisitions module.

Figure 4.4: In Cost centres *you manage your budgets.*

If you have filled in the *Assigned budget* and save the record, Adlib will calculate the amounts for *Working budget* and *Balance*. The *Working budget* is equal to the *Assigned budget* plus any *Previous balance*. The *Balance* is equal to the *Working budget* minus the *Commitments* minus the *Expenditure*.
After booking amounts to this cost centre in subscription or order records, the *Expenditure* and the *Balance* will be updated here automatically. *Commitments* are only created from within the Acquisitions module. If you place an order and know (approximately) what it is going to cost, this will be booked as a commitment and processed in the balance. This is not the case in the Serials module, where only the actual payments are registered as *Expenditure*. The reason behind this is that subscriptions are continuous and there is never a fixed date on which renewals (and therefore also commitments) take effect. Conversely, an order for a book, for example, is always a one-off event. For the calculation of the *Balance*, the *Commitments* are always taken into account though.

On the *Cost centre* tab you'll find the following fields:

Cost centre code	Enter the cost centre code here. You can enter any combination of letters, numbers and separators. This is a mandatory field, since it is used as the key for linking to this cost centre from within subscriptions (and acquisitions). The code must be unique.
Is part of, *Consists of*	If your cost centres have a hierarchical structure, then you can use these fields. Do note that each cost centre still has its own independent budget, and that no amounts are passed on along the hierarchy.
Cost centre name	Enter the full cost centre name here.
Description	Enter any additional information about the cost centre here.
Assignment date	When you assign a new budget, enter the date on which you assign it here. If you leave this field blank when assigning a new budget, Adlib will automatically enter the current date when the record is saved. If you are only correcting an existing budget, by increasing or decreasing it, then leave the assignment date as it is!
Assigned budget	Enter the budget assigned for the new year in *Assigned budget*. Enter a new *Assignment date* as well. Adlib will update the *Working budget* and *Balance* fields as follows, when you save the record: the *Working budget* will be equal to the *Previous balance* plus the *Assigned budget* plus the *Commitments*, and the *Balance* will be equal to the new *Working budget* minus the *Commitments* and *Expenditure*. Then, *Expenditure* will be cleared. To perform a budget clear down e.g. at year end, at least enter the assignment date and the desired new budget (in the place of the previous *Assigned budget*). If, in your institution, the remaining budget of last year can be transferred to the following year, then manually fill in the remaining *Balance* amount in *Previous balance,* when assigning a new budget: the

Previous balance plus the new *Assigned budget* plus any remaining *Commitments* results in the new *Working budget* on saving of the record. *Commitments* remain as they are.

However, if you wish to charge the *Commitments* to last years budget when assigning a new budget, and you do want to transfer the remaining budget, then add those commitments to the *Balance* of last year and enter that amount into the *Previous balance* field; then clear the *Commitments* field before you save the record.

If, on the other hand, it is not possible to transfer a remaining budget to the following year, then leave *Previous balance* at zero.

So, on saving the record, Adlib will first calculate the new *Working budget*, and then the new *Balance* by subtracting expenditures and any commitments from the *Working budget*.

Previous balance   You have to fill in this field manually when clearing down a budget, if you want the remaining budget of last year to be added to the *Working budget* of next year. If you copy the amount from the *Balance* field, then you must empty the *Commitments* field. On the other hand, if you want to carry forward the *Commitments* to the next year, then only deduct *Expenditure* from the last *Working budget*, and enter that in *Previous balance*.

Working budget,   These fields are automatically updated by
Balance   Adlib. The *Working budget* is equal to the *Assigned budget* if the remaining budget of last year is not carried over to the new year. The *Balance* is the *Working budget* minus *Expenditure* minus *Commitments*.

Commitments   This field contains the amount reserved for ordered titles, which has not been paid yet. It is updated automatically from within the Acquisitions module, but you may also update this field manually to make corrections, etc. With every automatical update of the *Commitments*, the *Balance* will be updated automatically as well.

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Expenditure	This field contains the amount paid this year on orders and subscriptions, for this cost centre. This field is updated automatically when you book a payment, as is the *Balance*. However, you may also edit this field manually, for instance to make corrections.
Notes	Here you can enter any other details about this cost centre.

4.3. Currencies

In the *Currencies* data source, you have to create records for each monetary unit in which you may have to pay orders and subscriptions, as far as those records are not present yet. This database is shared with the Acquisitions module.

On the *Currency data* tab of a currency record, fill in the standard monetary unit code for the currency, the full name, the exchange rate to your own currency, and the date on which that exchange rate was set.
The exchange rate has to be set, so that the accounting of the cost centres can be done in one and the same currency (your own currency).

Figure 4.5: The definition of euro's and the exchange rate to pound sterling, for English users: 1 euro = 0.81842 pound sterling, at the indicated date.

Currency code	Enter the standard (and unique) currency code for this monetary unit. Examples of these codes are: EUR, USD, GBP. For a full list see: *http://www.iso.org/iso/en/ prods-services/popstds/currencycodeslist.html*
Currency name	Enter the full name of this currency.
Exchange rate	The number you enter here, is what this currency costs in your local currency. For example: if

your local currency is the pound sterling and
here you describe the euro, then for the ex-
change rate enter, say 0.81842. In other words,
1 euro will cost you 0.81842 pounds sterling.
This exchange rate is used to convert prices in
foreign currencies to your own currency so to
enable Adlib to update the cost centre budgets.
It is recommended to update the exchange rate
regularly.

Date   Enter the date belonging to this exchange rate.
If you leave this field empty, then Adlib will au-
tomatically enter the current date.

Notes   Here you can enter any additional information
on this currency.

4.4. Letters

Figure 4.6: An example of a claim letter.

In the *Letters* data source you can store body texts of letters. These
can be used by Adlib later on, when e-mailing letters and for if you
want to print letters without using Word templates.
In the *Persons and institutions* data source, you specify per supplier
which letter must be used for which type of action. Note that the
Name of a letter record must be equal to the file name (without .dot)
of the same letter as Word template, if you want to be able to print by
means of the Word template; e-mails will use the record text.
The *Letters* data source contains a number of standard letters (which
you may edit to your liking), but you can also write your own letters
from scratch or create a letter specific to an individual supplier.

Some of the letters available here are used in the Acquisitions mod-
ule, not in the Subscription module. Adlib will merge the specific de-
tails (personal or company names, title of the ordered publication,
etc.) with the body text when the letter is printed.

Translations of field labels that Adlib uses in letters (e.g. the *Number* label), can be managed in the *Languages* data source.

4.5. Languages

The *Languages* data source contains one or more language records (one record per language), each with a list of terms in that language: these terms are used as labels for variable data in letters to be print-ed in that language. So you really only need records for the languages in which you want to be able to print letters.

Translations of field labels for letters	Management details		
Language			
Language	Nederlands		
Notes			
Translations			
Customer number	Klantnummer	Currency	Valuta
Subscription number	Abonnementsnummer	Unit price	Prijs/stuk
Title	Titel	Currency rate	Koers
ISSN	ISSN	Subtotal	Subtotaal
Publisher	Uitgever	Due date	Verwachtingsdatum
No. of subscriptions	Aantal abonnementen	Requester	Aanvrager
Price	Prijs	Notification date	Attenderingsdatum
Order number	Bestelnummer	Claims date	Reclameringsdatum
Order date	Orderdatum	Received	Ontvangen
Supplier	Leverancier	Paid	Betaald
Discount	Korting	Fully paid	Volledig betaald
Status	Status	Cost centre	Kostenplaats
Cancelled	Geannuleerd	Commitment	Verplichting
Cancellation date	Annuleringsdatum	Total value	Totaal waarde
Number of copies	Aantal	Total discount	Totaal korting
Volume	Jrg.	Total commitments	Totaal verplichting
Issue no.	afl.	Our reference	Onze referentie
Extra	Extra	ORDER LIST	*** ORDERLIJST ***

Figure 4.7: The Dutch language record of translations of labels which are used in letters.

A letter to a supplier will be printed in the correct language automati-cally if in the *Persons and institutions* file with the particulars of that supplier, you indicated which language record (in the *Language* field) must be used and which Word templates/letter records in the same language.

4.6. Readers

Figure 4.8: An example of a filled in Personal details *screen tab.*

The *Readers* data source refers to the BORROWER database. This database is used in Serials module, as well as in the Loans module (as the *Borrower* data source) and the Acquisitions module (as the *Requesters* data source), and therefore a reader may be a reader, a borrower and/or a requester all at the same time. So, personal details registered here, are shared between these modules. This data is used by Adlib when printing or e-mailing letters for the relevant reader.

Name is a read-only field which is put together by Adlib at the moment you save a reader record. The composition is as follows: the format `Surname, Initials Insertion` is preferred, so for instance *Winkel, R. van*. If no initials are available and a first name is, then it becomes Surname, First name Insertion, so for example *Winkel, Rupert van*. If no first name is available either, then this reader is probably an institution and the *Surname* suffices as *Name*.

The department or class where a reader can be found daily, can be registered as well. It will be printed on distribution lists, which eases the distribution of issues in large companies and institutions.

In *ID-number* you can enter a passport or other identification number like that of a driving license or public transportation card for instance, should it be required.

Figure 4.9: You can register multiple addresses for this reader.

In *Address type*, on the *Adresses* tab, you indicate whether the address is "home" or "workplace". If it is a postal address as well (either with or without a P.O.Box number), then mark the *Postal address* checkbox. In *Address*, just enter the street name or "P.O.Box". So, in *House number* a P.O.Box number may be entered as well. In some countries, on letters the house number must be printed in front of the street name and/or the postcode in front of the city name. Mark the relevant checkboxes if this is the case.

In the repeated field group *Telephone* you can enter multiple telephone numbers, and not necessarily just of telephones. In *Telephone type* you specify which device is linked to the number: you may choose from "landline", "mobile phone" and "fax".

If you enter a valid e-mail address in the *E-mail address* field, then after saving the record, *mailto:* is automatically placed in front of it, and the address will be underlined. It's possible to click the underlined address to open your e-mail program and write and send an e-mail immediately.

4.23.19

Figure 4.10: Some extra details of this reader.

On the *Reader details* tab, in the *Cost centre* field, enter the cost cen-
tre for this reader if you choose *Use budget per reader* as your charg-
ing method in the *Charging details* data source (see section 4.9).

In the event of a reader's temporary absence, e.g. because he or she
is on holiday, you can exclude the reader from the circulation system
for that period and thus remove the reader's name from the distribu-
tion list for that period. In the *Blocked from* field, enter the start date
of the period during which the reader will be absent, and enter the
end date in the *Blocked until* field. If you don't know the end date yet,
you can leave this field empty.

The *Field type* and *Content* fields are useful in case you wish to regis-
ter some personal detail of readers, for which no applicable field is
present. In *Field type* you then supply a name or short description of
your new field and its contents can be entered in the *Content* field
behind it.

4.7. Distribution lists

The entry form of a distribution list looks as follows:

Figure 4.11: An example of a distribution list.

For copies in circulation, you can create distribution lists. You may fill in the following fields:

List name   Start by entering a unique name for the distribution list.

Description   Here, you can enter a more detailed description of this list.

Title(s)   You cannot enter any data here. This field is filled automatically as soon as you link a distribution list is to a subscription (in the *Serial subscriptions* data source).

Reader(s)   Link readers to this distribution list by adding them to (occurrences of) the *Reader(s)* field. Press **Shift+F4** to look up existing readers in the *Readers* data source. You may also add new readers.

                 The order in which readers appear on the list is the same as the order in which the readers are assigned a loan period for the copy of the serial.

Return to library? You can specify for each reader whether they are to return the copy to the library.
If you choose *No*, the reader will be considered responsible for passing the copy on to the next reader on the list. This type of circulation is called uncontrolled circulation or circular routing. If this option is also set to *No*

for the last person, then he or she may keep the copy. If you choose *Yes*, the reader must make sure that the copy is returned to the library or delivered to the next reader by the date calculated by the system; this date will be printed on the list. This type of circulation is know as controlled circulation, or radial routing.

Read period   Here, you can enter the number of days the reader is allowed to keep the copy on loan. The default setting is three days, but you can alter this if you wish.

Footer   You can add a footer text to be printed on the distribution list. You can incorporate a fixed footer (for use in all distribution lists) using the *Layout distribution list* data source (see next section).

When checking in a copy of a serial, Adlib will check whether that serial is linked to a distribution list. If so, a distribution list will automatically be printed containing data about the specific issue and the names of interested readers.

In the case of double subscriptions, you'll have to create two identical distribution lists albeit each with a unique list name.

4.8. Layout distribution list

In 4.2, distribution lists are printed to the *Circlist#.dot* Word template in the current interface language, by default. These templates can be found in the Adlib folder *\Worddoc\templates*. As usual, a distribution list is printed after you've registered a newly received serial issue. You may of course adjust the layout of these templates in MS Word.

If the printing of distribution lists to Word templates is not desirable, then you'll still have the option of printing the old "DOS" way. Adlib does this automatically if the template in the current language cannot be found. So, just move the *Circlist#.dot* files to another folder, if you wish not to employ them. A few layout characteristics for the "DOS" way of printing can still be set in the one record in the *Layout distribution list* data source, but you'll have significantly fewer options than in Word templates.
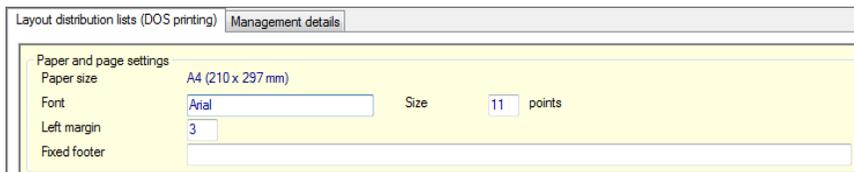
Figure 4.12: These settings for distribution lists apply only if you don't use the Word template.

Paper size	You can only print to A4 paper size.
Font, Size	Here you can set the font to be used and the font size.
Left margin	Enter the size of the left margin. You can specify this in number of characters.
Fixed footer	Here you can enter a fixed footer text that will be printed on all distribution lists. If you require a different footer for each distribution list, then specify this in the *Distribution lists* data source. If you have specified both a fixed footer and one for each distribution list, then both will be printed.

4.9. Charging details

In this data source, you can set the method according to which you want charging to take place. You can also specify a default cost centre here.

For *Method*, choose which method you want to use for charging. You have a choice between two methods:

- **Use reader budget(s)** – With this method, the costs of the subscription are proportionately distributed between the readers of the serial. When a payment is booked, the linked distribution lists are used to determine how many readers read this serial, and which budgets belong with these readers. Then the payment amount is divided between the number of readers and booked to the appropriate cost centres.

If you opt for this method, you must fill in the *Cost centre* field in the *Readers* dataset. You will find this field on the *Reader details* tab. The library will probably not be financially responsible for this cost centre, but will take care of invoicing.

* **Use serial budget(s)** – For each subscription, you can specify to which budgets the costs of the serial or loose-leaf are to be booked. If you specify more than one budget, you can indicate how the costs are to be divided among the various budgets by using percentages. When you enter a payment, it will be booked to the budgets specified for the subscription, divided according to the specified percentages. If you have not specified a cost centre for the subscription, the costs will be deducted from the standard cost centre that you entered in the *Charging details* data source.

5. Serial subscriptions management

Via *Step 1* in the *Search wizard* of the Serials module, in the *Serial subscriptions* data source you can enter, renew or cancel subscriptions to serials (and also review or edit the data on the subscriptions) and check them in (record their receipt).

You can also check in serials by directly selecting the *Check in serials* option. Through *Serial subscriptions* and *Check in serials* you actually open one and the same database, and of opened records you can view and edit the same data. The only difference is that the screen tabs are arranged in a different order: via *Check in serials* you open records directly on the *Booking* tab.

In both data sources the available screen tabs are: *Bibliographic details*, *Subscription details*, *Financial details*, *Booking*, *Payments*, *Scanned contents* and *Management details*.

All entered serial titles are saved in their own separate dataset in the DOCUMENT database (the catalogue). Therefore they can be accessed directly in the Adlib Public Access Catalogue of your library and in Adlib Library (the catalogue management module).

5.1. Registering a subscription to a serial

■ Subscription details tab

Figure 5.1: The Subscription details *tab filled in.*

Subscription code	The *Subscription code* (formely *Short title*) acts as a unique key to a subscription record. When you describe a subscription, you choose a unique subscription code: in this code you could include abbreviations for supplier and title, for instance. Later on you can quickly search for a subscription record via this code, but the code is also used with links to other databases, and you may also come across this code when printing subscription data. The subscription code and the title of the subscribed serial publication are displayed on most screens with subscription details, at the top of the screen tab and usually as read-only fields. Only on *Subscription details* you can enter or edit the field.
Title	Enter the title (and subtitle if there is one) of the serial, without any lead word*. This field is mandatory. You can look up an existing title via **Shift+F4**, and link it to the current subscription this way. A new title may be created and linked in different ways, for instance: in the *Title* field, press **F10** to create a new title record via a catalogue zoom screen, and link it to the current subscription immediately upon saving of the title description. * Any lead word can only be entered in the zoom screen to the serial title.

Start date / End date	The *Start date* is the date on which the subscription has to start. You can leave the *End date* empty if you don't know yet when the subscription will be ended.
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. If this period has elapsed, and you have not received an issue, Adlib will make a claim letter for this serial. 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.

Supplier	Enter the supplier's name. This field is linked to the *Persons and institutions* database.
Subscription number	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.
Number of sub-scriptions	Enter the number of copies you will be receiving of each issue.
Remarks	Enter any comments about this subscription. On the *Booking* and *Payments* tabs, in the *Title data* box, you'll encounter these remarks again as read-only fields. On the *Payments* tab, in the *Payments* box, you'll also find a *Notes* field in which you may enter any remarks about the payments.
Distribution lists	Here (in repetitions of this field) you can enter one or more distribution lists for this serial. This field is linked to the *Distribution lists* database. You can look up an existing distribution list via the *Linked record search screen* (**Shift+F4**). If you enter the name of a distribution list here, the name of the subscription and the title of the serial will automatically be entered in the corresponding distribution list record. It is not recommended to enter more distribution lists than you have sub-scriptions to this serial. (Adlib notifies you if you link too many lists.)
Do not print dis-tribution list?	This field relates to the distribution list to the left of it. So to a serial subscription record you can link to multiple distribution lists, for instance as many as the *Number of subscriptions* (copies) which you receive of each issue. And per distribu-tion list you can, if you wish, indicate (by marking *Do not print distribution list*?) that you, for what-ever reason, do not want Adlib to automatically print lists for the concerning distribution lists.
Create order let-	If you want to print an order letter to order this serial, select *Yes*. If you don't want to print an

ter	order letter for this serial, then leave the field blank or select *No*. You wil not want to print an order letter for an existing subscription which automatically renews.
	You can create order letters by selecting the *Generate order letters* option from *Step 1* in the *Search wizard*.
Ordered on	This is the date on which the order letter was generated for the serial (for printing or e-mailing). If you do not generate an order letter but use a different method to communicate the order to your supplier (e.g. by phone), then you can enter a date here yourself.
Order number	Enter the order number of this serial. This number is only relevant if you still have to order this subscription from your supplier, in which case it will be printed on the order letter. If the first issue doesn't arrive on time after the order is placed, the order number will be noted in the claim letter.
Claim when first issue has not been received before	This date is only used if you are about to take a subscription to the current serial. If no copy has been received by this date, Adlib will create a claim letter to the supplier as soon as you choose the *Generate claim letters* option in *Step 1* of the *Search wizard*. Adlib automatically clears this date once the first copy has been received.
Renew / cancel	If you wish to cancel your subscription to this serial, select *Cancel*. To renew your subscription, select *Renew*. 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 *No action* from the drop-down list or leave the field empty.
	To actually generate cancellation or renewal letters, use the relevant options in the *Search wizard*.
Before	Enter the date by which notice of renewal or cancellation must have been sent.
Renewed on	This is the date on which the subscription was last renewed. Adlib will fill in a date automatically when a renewal letter is printed for the serial. If

you renew the serial in another way (e.g. using a form provided by the supplier), you can enter a date here yourself.

Cancelled on   This field may contain a date on which the sub-scription to the serial was cancelled. You may en-ter the date yourself, but Adlib will fill it in auto-matically when a cancellation letter is printed for the serial.

Claim this serial   Use this field to indicate whether claim letters
when overdue   must be created for copies that have not been received. If you select *No*, Adlib will not send claim letters for overdue copies. If you choose *Yes*, Adlib will check, when you start creating claim letters, whether any copies of serials are overdue and will then, if necessary, create claim letters for them. You can generate claim letters from *Step 1* in the *Search wizard*.

Grace period for   If you have selected *Yes* for *Claim this serial when*
claims in days   *overdue*, then enter here how many days Adlib has to wait before a claim letter can be generated.

Purge policy for   Enter the policy according to which old issues are
old issues   to be automatically purged. (When purging issues, you delete check-in data of old issues.) You can choose between:
                       -Do not automatically purge - Old issues are never purged automatically. They will have to be purged manually.
                       - 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 database. The details on these issues will be com-bined 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 occur-rence at the top of the *Holding* field on the *Copies and shelf marks* tab in the *Serials* data source in the Library application.
                       -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* 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 (which has to be started manually though) and, if required, moved to the holding.

■ **Bibliographic details tab**

Figure 5.2: The Bibliographic data *zoom screen to edit title details of a serial.*

On the read-only *Bibliographic details* screen tab, you can view details of the title which you linked to this subscription record on the *Sub-scription details* tab. These details are retrieved from the DOCUMENT database (the catalogue) in which title records are stored. If you want to see more title details or wish to enter data for the title, then (from display mode of the subscription record) click the underlined title to open the zoom screen for it. Put this zoomed record in edit mode to enter or edit data.

■ Financial details tab

Figure 5.3: The Financial details *tab of a subscription record.*

The fields under *Title data* are automatically copied from the *Subscription details* tab, and cannot be changed here.

Price	Enter the subscription price of the serial. This is only a guide price. The amount is not processed in the cost centres since this is not a payment yet. Moreover, this module does not work with commitments (which could be processed in the balance). So the balance of any cost centre won't be adjusted here.
Currency	Enter the currency code for the amount: use **Shift+F4** to search for registered currencies. If you leave this field blank, and you have filled in a price, then Adlib will automatically enter the default currency here. This field is linked to the *Currencies* database.
Allocation	You can specify multiple cost centre allocations (insert extra occurrences of the field group). This makes it possible to spread one expenditure over several cost centres, each with their own budget. In the *Allocation* field, specify how much percent of the costs of this subscription must be booked to the cost centre next to it. If you enter more than one allocation percentage (for as many cost centres), then the percentages must of course add up to 100%.
Cost centre	Enter the code of the cost centre. This field is linked to the *Cost centres* database. Use **Shift+F4** to search for registered cost centres in that database.

■ Booking tab

On this screen tab, you can check in newly received issues. You can also do this by using the *Check in serials* option in *Step 1* of the *Search wizard*. From both angles you check in a serial in exactly the same way. Chapter 5.3 describes how to do this. If you are registering a new subscription, and if you haven't received as issue yet, then only fill in the fields in the *Next expected issue* box: the fields in the *Issues* box will be filled in on receipt of an issue only.

Figure 5.4: The Booking *tab of a new subscription record.*

■ Scanned contents tab

Figure 5.5: The Scanned contents *tab of a serial subscription record.*

The *Scanned contents* field on the tab with the same name in a serial subscription record is an application field in which you can link to all sorts of files, but it is meant for documents of scanned tables of contents of received serial issues. The field group is repeatable, so you can link as many documents as you wish. Mark the *Still to e-mail* checkbox behind the name of a document if that document still has to

be sent by e-mail to the readers which you list in the (repeatable and validated) *Readers* field.

At this point no e-mail is actually sent, not even when you save this record. Only if you choose *Send scanned contents*, in *Step 1* of the *Search wizard*, then Adlib will harvest linked scanned contents for which the *Still to e-mail* checkbox is marked, and will subsequently send them to the *Readers* (for whom a valid e-mail address must have been registered, of course). After mailing, the *Still to e-mail* checkbox will automatically be emptied, and the date of today will be entered in the *Sent on* field.

A second way to send the scanned contents is to create a record selection first, open the *Print wizard* and choose the output format *Send e-mails with scanned contents*. In all marked records, the relevant adapl will check if the *Still to e-mail* checkbox is marked, and only for those records then generate e-mails and send them.

■ Payments tab

On this tab, you can process subscription payments. As with checking in serials, you can process payments both in the *Serial subscriptions* data source and in the *Payments* data source. From both angles this works the same way. Chapter 7 describes how to process payments.

Figure 5.6: The Payments *tab of a subscription record.*

■ Management details tab

The data on this screen tab is automatically updated by Adlib and cannot be edited.

5.2. Renewing/cancelling subscriptions

You can renew or cancel a subscription to a serial by selecting the appropriate action in the *Renew/cancel* field on the *Subscription details* tab in the *Serial subscriptions* data source. You can then choose the *Generate renewal letters* or *Generate cancellation letters* option from *Step 1* in the *Search wizard* to print the appropriate letter.

If you selected *no action* in the *Renew/cancel* field, the subscription status will remain unchanged.

5.3. Checking in serials

You can record the receipt of serials using the *Check in serials* option in *Step 1* of the *Search wizard*, or you can use the *Booking* tab of the *Serial subscriptions* data source. In both cases you'll see the *Booking* screen tab.

When you want to check in a new issue, first look for the relevant subscription, e.g. in the *Check in serials* data source. Put the retrieved record in edit mode. Open the *Booking* tab if it isn't open yet. When registering the subscription details you will most likely already have filled in the data in the *Next expected issue* box, if not, then do that now for the currently received issue: do not fill in anything in the *Issues* box yet.
To check in a received issue, a line with empty fields should be visible in the *Issues* box. If that is not the case yet, then click the *Insert occurrence for next issue?* checkbox, to add a new field group occurrence. A number of details will now be processed automatically, namely:

1. The details from the *Next expected issue* will be copied to *Issues*: almost all data for the currently received issue will thus be filled in automatically.

2. The details for the new *Next expected issue* will be calculated automatically using the issuing frequency. You'll only have to enter the *Issue name* manually.

Subsequently you'll only have to enter the number of copies which you received of this issue up till now, in the *Received* field. 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 screen, and you have received all copies of this issue if it reads zero. (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.

Figure 5.7: Checking in the first received issue.

Save the record and a distribution list will automatically be printed for every copy received (if that distribution list is available of course, and if its printing hasn't been blocked). If you receive a number of copies in partial deliveries, then each subsequent distribution list will be printed when checking in following copies.

Do note that you really have to provide an *Issue no.* if you want any distribution lists to be printed. If such a number is not present on the serial, then use the current week number or quarter number.

5.4. Clearing up the receipt history / purging issues

In *Step 1* of the *Search wizard* you'll find two options for purging earlier checked in issues:

• *Automatically purge issues;*
• *Manual purge of issues.*

When purging issues, you delete check-in data of old issues. Manually purging means that you have to indicate whether booking information has to be removed or not, per checked-in issue of each record to be purged. With the *Automatically purge issues* option in *Step 1* of the *Search wizard*, removal is automatic, following the purge policy which you have set per serial subscription.

■ Automatically purge issues

Adlib can automatically purge a serial subscription for you in two
ways, via *move old issues to the holding*, or *remove old issues*. You
can indicate which of the two you want to use in the *Purge policy for
old issues* field of a subscription record (see section 5.1).
In the subscription record you also have to fill in *After how many
months should old copies be purged?*
Issues older than the number of months stated there will be moved to
the holding or will be removed, during automatic purging. To this end,
today's date is compared with the date of receipt of an issue.

To purge issues according to the settings per subscription, select the
Automatically purge issues option in the *Search wizard*. Before actual-
ly purging, Adlib will ask you for confirmation.
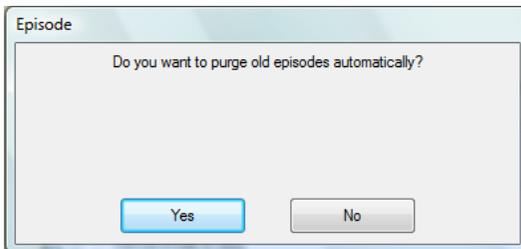
A summary of the deleted data is copied to the *Holding* field on the
Copies and shelf marks tab in the *Serials* data source in the Library
application. All deleted data will also be saved automatically to hard
disk in a text file with the name format purged_<current ISO
date>.txt.

■ Manual purge of issues

Issues can also be purged manually. Serial subscriptions for which you
have selected *do not automatically purge* in the *Purge policy for old
issues* field (see chapter 5.1), can only be purged manually. Therefor,
choose *Manual purge of issues* in *Step 1* of the *Search wizard*. Then
search for the serial subscription record you want to purge. A re-
trieved record will open on the *Purge issues* screen tab.

Put the record in edit mode and mark the issue data you want to re-
move under *Delete*. The marked issues will be removed from this rec-
ord as soon as you save it. In this case, removed data is copied to a
text file with the name format purged<ISO date>_<subscription
code>.txt.
In the *Holding* field you may summarize details about the removed
issues manually, if you wish.

Figure 5.8: Purging issues manually.

5.5. Copies in circulation

Using the *Copies in circulation* option in the *Search wizard*, you can check which copies are in circulation and who has which copy, and you can record when a copy is returned to the library.
The *Copy in circulation* tab is displayed when you choose a distribution list via the *Copies in circulation* option.

Figure 5.9: Here you'll see which copies are in circulation for the selected distribution list.

With radial routing (controlled circulation), as in the screen shot above, you immediately see who currently has the copy and when it should be returned, because this is controlled through the library.

In the case of circular routing (uncontrolled circulation), you can only see who should bring the copy back to the library on which day, and who ought to have it according to the allocated loan periods.

The following fields can be viewed or changed:

Reader(s)   Here you see which readers will receive the serial. The order in which readers appear on the list is the same as the order in which readers are allocated a

unit of time in which to read the serial.

Return?   Here you can see whether a reader has to return a copy to the library.

Time   Here you can see how many days a reader is allowed to keep the serial.

Due date   This is the date the copy is expected back at the library.

Returned on   For the reader(s) for which the *Return?* field is set to *Yes*, enter the date on which a copy is returned. If there are more people who are to receive this copy, Adlib will print a new distribution list after a copy has been returned. In addition, the *Due date* for the reader will disappear, and for the next reader to receive the serial that date will automatically be adjusted.
If this is the last reader that had to return the serial, then this circulation record will be removed. You will receive a message thereof after saving this record.

NB: If the last reader returns the copy to the library, you don't have to check it in: you can just delete the circulation record. After all, if it is received for the last time, Adlib will remove it anyway as the copy in question (from this record) is no longer in circulation.
Besides, it saves you some work as well.

6. Loose-leaf subscriptions management

Via *Step 1* in the *Search wizard* of the Serials module, in the *Loose-leaf subscriptions* data source you can enter, renew or cancel subscriptions to loose-leafs (and also review or edit the data on the subscriptions) and check them in (record their receipt).
You can also check in loose-leafs by directly selecting the *Check in loose-leafs* option. Through *Loose-leaf subscriptions* and *Check in loose-leafs* you actually open one and the same database, and of opened records you can view and edit the same data. The only difference is that the screen tabs are arranged in a different order: via *Check in loose-leafs* you open records directly on the *Booking* tab.
In both data sources the available screen tabs are: *Bibliographic details*, *Subscription details*, *Financial details*, *Booking*, *Payments* and *Management details*.

All entered loose-leaf titles are saved in their own separate dataset in the DOCUMENT database (the catalogue). Therefore they can be accessed directly in the Adlib Public Access Catalogue of your library and in Adlib Library (the catalogue management module).

6.1. Registering a subscription to a loose-leaf

■ Subscription details tab

Figure 6.1: The Subscription details *tab filled in.*

Subscription code	The *Subscription code* (formely *Short title*) acts as a unique key to a subscription record. When you describe a subscription, you choose a unique sub-

scription code: in this code you could include ab-
breviations for supplier and title, for instance. Lat-
er on, you can quickly search for a subscription
record via this code, but the code is also used with
links to other databases, and you may also come
across this code when printing subscription data.
The subscription code and the title of the sub-
scribed serial publication are displayed on most
screens with subscription details, at the top of the
screen tab and usually as read-only fields. Only on
Subscription details you can enter or edit the field.

Title   Enter the title (and subtitle if there is one) of the
                       serial, without any lead word*. This field is man-
                       datory. You can look up an existing title via
                       Shift+F4, and link it to the current subscription
                       this way. A new title may be created and linked in
                       different ways, for instance: in the *Title* field,
                       press **F10** to create a new title record via a cata-
                       logue zoom screen, and link it to the current sub-
                       scription immediately upon saving of the title de-
                       scription.
                       * Any lead word can only be entered in the zoom
                       screen to the loose-leaf title.

Supplier   Enter the supplier's name. This field is linked to
                       the *Persons and institutions* database.

Subscription   Enter the subscription number that your supplier
number   gave you for this loose-leaf. This subscription
                       number is referred to in correspondence about
                       this loose-leaf for the supplier.

Number of sub-   Enter the number of copies you will be receiving of
scriptions   each loose-leaf set.

Remarks   Enter any comments about this subscription. On
                       the *Booking* and *Payments* tabs, in the *Title data*
                       box, you'll encounter these remarks again as
                       read-only fields.
                       On the *Payments* tab, in the *Payments* box, you'll
                       also find a *Notes* field in which you may enter any
                       remarks about the payments.

Create order let-ter	If you want to print an order letter to order this loose-leaf, select *Yes*. If you don't want to print an order letter for this loose-leaf, then leave the field blank or select *No*. You wil not want to print an order letter for an existing subscription which au-tomatically renews.
	You can create order letters by selecting the *Gen-erate order letters* option from *Step 1* in the *Search wizard*.
Ordered on	This is the date on which the order letter was generated for the loose-leaf (for printing or e-mailing). If you do not generate an order letter but use a different method to communicate the order to your supplier (e.g. by phone), then you can enter a date here yourself.
Order number	Enter the order number of this loose-leaf. This number is only relevant if you still have to order this subscription from your supplier, in which case it will be printed on the order letter. If the first set doesn't arrive on time after the order is placed, the order number will be noted in the claim letter.
Claim when first issue has not been received before	This date is only used if you are about to take a subscription to the current loose-leaf. If no set has been received by this date, Adlib will create a claim letter to the supplier as soon as you choose the *Generate claim letters* option in *Step 1* of the *Search wizard*. Adlib automatically clears this date once the first set has been received.
Renew / cancel	If you wish to cancel your subscription to this loose-leaf, select *Cancel*. To renew your subscrip-tion, select *Renew*. If you neither want to cancel nor renew the subscription, or you don't know yet what you want to do with it, then select *No action* from the drop-down list or leave the field empty. To actually generate cancellation or renewal let-ters, use the relevant options in the *Search wiz-ard*.
Before	Enter the date by which notice of renewal or can-cellation must have been sent.
Renewed on	This is the date on which the subscription was last renewed. Adlib will fill in a date automatically

when a renewal letter is printed for the subscrip-
tion. If you renew the loose-leaf subscription in
another way (e.g. using a form provided by the
supplier), you can enter a date here yourself.

Cancelled on   This field may contain a date on which the sub-
scription to the loose-leaf was cancelled. You may
enter the date yourself, but Adlib will fill it in au-
tomatically when a cancellation letter is printed for
the subscription.

■ Bibliographic details tab

Figure 6.2: The Bibliographic data *zoom screen to edit title details of a loose-leaf.*

On the read-only *Bibliographic details* screen tab, you can view details
of the title which you linked to this subscription record on the *Sub-
scription details* tab. These details are retrieved from the DOCUMENT
database (the catalogue) in which title records are stored. If you want
to see more title details or wish to enter data for the title, then (from
display mode of the subscription record) click the underlined title to
open the zoom screen for it. Put this zoomed record in edit mode to
enter or edit data.

■ Financial details tab

Figure 6.3: The Financial details *tab of a subscription record.*

The fields under *Title data* are automatically copied from the *Subscription details* tab, and cannot be changed here.

Price   Enter the subscription price of the loose-leaf. This is only a guide price. The amount is not processed in the cost centres since this is not a payment yet. Moreover, this module does not work with commitments (which could be processed in the balance). So the balance of any cost centre won't be adjusted here.

Currency   Enter the currency code for the amount: use **Shift+F4** to search for registered currencies. If you leave this field blank, and you have filled in a price, then Adlib will automatically enter the default currency here. This field is linked to the *Currencies* database.

Allocation   You can specify multiple cost centre allocations (insert extra occurrences of the field group). This makes it possible to spread one expenditure over several cost centres, each with their own budget. In the *Allocation* field, specify how much percent of the costs of this subscription must be booked to the cost centre next to it. If you enter more than one allocation percentage (for as many cost centres), then the percentages must of course add up to 100%.

Cost centre   Enter the code of the cost centre. This field is linked to the *Cost centres* database. Use **Shift+F4** to search for registered cost centres in that database.

■ Booking tab

On this screen tab, you can check in newly received sets. You can also do this by using the *Check in loose-leafs* option in *Step 1* of the *Search wizard*. From both angles you check in a loose-leaf in exactly the same way. Chapter 6.3 describes how to do this. If you are registering a new subscription, and if you haven't received a set yet, then fill in nothing yet: the fields in the *Issues* box will be filled in on receipt of one or more sets only. Note that for loose-leaf subscriptions there usually are no details available about the next expected sets, so those fields are not offered here.

Figure 6.4: The Booking *tab of a new loose-leaf subscription record.*

■ Payments tab

On this tab, you can process subscription payments. As with checking in loose-leafs, you can process payments both in the *Loose-leaf sub-scriptions* data source and in the *Payments* data source. From both angles this works the same way. Chapter 7 describes how to process payments.

Figure 6.5: The Payments *tab of a subscription record.*

■ Management details tab

The data on this screen tab is automatically updated by Adlib and cannot be edited.

6.2. Renewing/cancelling subscriptions

You can renew or cancel a subscription to a loose-leaf by selecting the appropriate action in the *Renew/cancel* field on the *Subscription details* tab in the *Loose-leaf subscriptions* data source. You can then choose the *Generate renewal letters* or *Generate cancellation letters* option from *Step 1* in the *Search wizard* to print the appropriate letter.

If you selected *no action* in the *Renew/cancel* field, the subscription status will remain unchanged.

6.3. Checking in loose-leafs

You can record the receipt of loose-leafs using the *Check in loose-leafs* option in *Step 1* of the *Search wizard*, or you can use the *Booking* tab of the *Loose-leaf subscriptions* data source. In both cases you'll see the *Booking* screen tab.

When you want to check in a new set, first look for the relevant subscription, e.g. in the *Check in loose-leafs* data source. Put the retrieved record in edit mode. Open the *Booking* tab if it isn't open yet.

Figure 6.6: Checking in the second received set.

To check in a received set, a line with empty fields should be visible in the *Issues* box. If that is not the case yet, then click the *Insert occurrence for new set?* checkbox, to add a new field group occurrence.

Because of the irregular character of a loose-leaf subscription, details of a newly received set won't be calculated automatically: you'll have to fill in all fields manually. You can fill in *Year*, *Serial number*, *Number of received sets* (should be equal to *No. of copies*), *Number of pages* (per set), *Date received* and *Inserted* (in *Inserted* you can indicate whether the set(s) have already been inserted in the relevant binders.

6.4. Clearing up the receipt history / purging sets

In *Step 1* of the *Search wizard* you'll find one option for purging earlier checked in sets: *Manual purge of sets.* Automatic purging does not apply here.

When purging loose-leaf sets, you delete check-in data of old sets. Manually purging means that you have to indicate whether booking information has to be removed or not, per checked-in set of each record to be purged.

So, to begin, choose *Manual purge of sets* in *Step 1* of the *Search wizard*. Then search for the loose-leaf subscription record you want to purge. A retrieved record will open on the *Purge sets* screen tab.

Figure 6.7: Purging sets manually.

Put the record in edit mode and mark the sets you want to remove under *Delete*. The marked sets will be removed from this record as soon as you save it. In this case, removed data is copied to a text file with the name format `purged<ISO date>_<subscription code>.txt.`

7. Payments

You can process subscription payments in the *Payments* data source, via *Step 1* of the *Search wizard*, or on the *Payments* tab of the *Serial subscriptions* or *Loose-leaf subscriptions* data source. In both cases you see the following screen tab:

Figure 7.1: Taking care of payments.

To carry out a payment, fill in the fields *Period*, *Amount* and, if appropriate, *Invoice number* and *Notes*, and then save the record.

A subscription will be linked to one or more cost centres with a budget. As soon as a payment has been made for a specific subscription (during storage of the record), the balance of the cost centre(s) is automatically updated. Adlib will also display the bookings on screen. The same cost centres are used in the Acquisitions module.

To process a subsequent payment for the subscription in the above example, it is recommended to add the most recent payment at the top. Place the cursor in one of the fields of the top most field group occurrence in the *Payments* box and insert a new occurrence above it.

On this screen tab you can view and edit the following fields:

Period   Enter the period for which the payment is to be
                        made, e.g. `Jan. – June 1997 or Nos. 14 – 26`
                        `1996`.

Currency   Enter the code for the currency on the invoice.

Amount   Enter the invoice amount. This amount may be in a
                        foreign currency. Adlib will then use the exchange
                        rate saved in the currency file to calculate the
                        amount back to your local currency.
                        This amount will be booked as expenditure on the
                        cost centre(s) for this subscription, or on those for
                        the accompanying readers.

Rate, Total,   Adlib fills in these fields automatically.
Booked on

Invoice number   Enter the number of the invoice which you are cur-
                        rently paying.

Notes   Enter any comments about this payment.

Allocation, Cost   In this fields, Adlib displays the values you entered
centre   in the *Cost centre(s)* box on the *Financial details*
                        tab.

8. Printing letters

From *Step 1* in the *Search wizard* you can print four types of letters, as well as a claim list:
- order letters;
- claim list;
- claim letters;
- renewal letters;
- cancellation letters.

Letters are not printed for *all* subscriptions. Order letters and claim letters are printed only if *Yes* has been selected in the respective field in the subscription record.
Claim letters for first copies of serial subscriptions for example, are printed only if the date in the *Claim when first issue has not been received before* field has elapsed.

The claim list is a list of serial copies that you should have received but have not arrived yet. Only serials for which you selected *Yes* in the *Claim this serial when overdue* field will be included.

Renewal letters and cancellation letters are printed only for subscriptions for which the *Renew/Cancel* field has been set to *Renew* or *Cancel* and the date of *Renew/Cancel before* has already elapsed or is within thirty days from the current date.

After printing, Adlib will show a message telling you how many letters have been printed.

To just print an order letter for a specific subscription, first search for the specific record, and then print it to the proper output format (order letter) via the *Print wizard*. (See the Adlib User Guide for more information about general functionality.)

8.1. Generate order letters

In *Step 1* of the *Search wizard* you'll find the *Generate order letters* option. This print option starts the *wserord* adapl. This adapl collects all subscription records in which the *Create order letter?* field has been set to *Yes*, and exports the required data for an order of the serial publiccation to the *serial_order_<language>.dot* Word template (instead of *<language>* you'll find it reads "nederlands" or "english", for example). Orders will be collected per supplier and then placed on one letter.

The created documents will be opened in MS Word, where you can still edit them before actually printing them. If the template is not present in the language of the supplier or if printing this way fails, the letter will be printed directly as plain text. If the supplier must be contacted through e-mail – this can be set with the supplier details – then the letter is sent via e-mail, so nothing will be printed on paper. For e-mailing, the template is not used. Of each e-mail sent, a copy is sent to the sender address (which you set in line 278 in *adlib#.txt* files), so that you have prove of sending the e-mail.
After printing, today's date will be saved in the *Serial ordered on* field in the subscription record.

The *wserord2* adapl is derived from *wserord* and has practically the same function, yet as the output format *Order letters*. The difference is that here you need to search for and mark the records for which you want to print order letters. Then you start the *Print wizard* and select the mentioned output format. Adlib will then print order letters for all marked records, regardless (!) of whether the *Create order letter?* field has been set to *Yes* or *No*. If you want orders for one and the same supplier to come on one letter, then first sort all your marked subscription records on the *Supplier* field.

8.2. Print a claim list

In *Step 1* of the *Search wizard* you'll find the *Print a claim list* option. This print option starts the *claimlst* adapl. This adapl prints a list of serial issues which need to be claimed; that list is intended for internal use. The adapl only applies to serials since loose-leaf sets are usually released irregularly and therefore cannot be claimed. This adapl does not use a template.
An overdue issue can only be claimed if the *Claim this serial when overdue?* field (in a subscription record) has been set to *Yes*, and the *Grace period for claims in days* has past.

By the way: dates are printed in ISO format, for example: 2007-12-31.

8.3. Generate claim letters

In *Step 1* of the *Search wizard* you'll find the *Generate claim letters* option. This print option starts the *wclaim* adapl. This adapl creates two types of claim letters at once, namely claims for ordered subscriptions of which the first issue or set has not been delivered yet, and claims for existing subscriptions of which one or more copies of an

issue haven't yet arrived. For a subscription, letters of the first kind can only be generated if in the relevant subscription record the *Claim when first issue has not been received before* field has been filled in and that date has expired. An overdue issue of an exisiting subscription (the second letter type) can only be claimed if the *Claim this serial when overdue?* field (in a subscription record) has been set to *Yes*, and the *Grace period for claims in days* has past. (Note that the latter type of letters cannot be generated for loose-leafs.)

So the adapl collects claims per letter type and also per supplier, and exports the required data to the *serial_order_claim_<language>.dot,* respectively *serial_claim_<language>.dot* Word templates (instead of *<language>* you'll find it reads "nederlands" or "english", for example).

The created documents will be opened in MS Word, where you can still edit them before actually printing them. If the template is not present in the language of the supplier or if printing this way fails, the letter will be printed directly as plain text. If the supplier must be contacted through e-mail – this can be set with the supplier details – then the letter is sent via e-mail, so nothing will be printed on paper. For e-mailing, the template is not used. Of each e-mail sent, a copy is sent to the sender address (which you set in line 278 in *adlib#.txt* files), so that you have prove of sending the e-mail.

The *wclaim2* adapl is derived from *wclaim* and has practically the same function, yet as the output format *Claim letters*. The first difference is that here you need to search for and mark the records to which you want to apply the output format: however, the same conditions apply as for printing claims from within the *Search wizard*, so letters will only be created for relevant records in the selection. The second difference is that the two possible claim letter types (as explained in the paragraph above) are now combined in one letter; the *serial_claim_<language>.dot* template is used for this purpose.

After marking a record selection, you start the *Print wizard* and select the mentioned output format. If you want claims for one and the same supplier to come on one letter, then first sort all your marked subscription records on the *Supplier* field.

8.4. Generate renewal letters

In *Step 1* of the *Search wizard* you'll find the *Generate renewal letters* option. This print option starts the *wrenew* adapl. This adapl collects all subscription records in which the *Renew/cancel* field has been set to *Renew* and in which the *Before* field contains a date which is at least 30 days after today's date, and exports the required data for a renewal of the subscription to the *serial_renew_<language>.dot* Word

template (instead of *<language>* you'll find it reads "nederlands" or "english", for example). Renewals will be collected per supplier and then placed on one letter.

The created documents will be opened in MS Word, where you can still edit them before actually printing them. If the template is not present in the language of the supplier or if printing this way fails, the letter will be printed directly as plain text. If the supplier must be contacted through e-mail – this can be set with the supplier details – then the letter is sent via e-mail, so nothing will be printed on paper. For e-mailing, the template is not used. Of each e-mail sent, a copy is sent to the sender address (which you set in line 278 in *adlib#.txt* files), so that you have prove of sending the e-mail.

After printing, today's date will be saved in the *Renewed on* field in the subscription record.

8.5. Generate cancellation letters

In *Step 1* of the *Search wizard* you'll find the *Generate cancellation letters* option. This print option starts the *wcancel* adapl. This adapl collects all subscription records in which the *Renew/cancel* field has been set to *Cancel* and in which the *Before* field contains a date which is at least 30 days after today's date, and exports the required data for a cancellation of the subscription to the *serial_cancel_<language>.dot* Word template (instead of *<language>* you'll find it reads "nederlands" or "english", for example). Cancellations will be collected per supplier and then placed on one letter.

The created documents will be opened in MS Word, where you can still edit them before actually printing them. If the template is not present in the language of the supplier or if printing this way fails, the letter will be printed directly as plain text. If the supplier must be contacted through e-mail – this can be set with the supplier details – then the letter is sent via e-mail, so nothing will be printed on paper. For e-mailing, the template is not used. Of each e-mail sent, a copy is sent to the sender address (which you set in line 278 in *adlib#.txt* files), so that you have prove of sending the e-mail.

After printing, today's date will be saved in the *Cancelled on* field in the subscription record.

8.6. Printing distribution lists

Distribution lists are printed to the *Circlist#.dot* Word template in the current interface language, by default. These templates can be found in the Adlib folder *\Worddoc\templates*. As usual, a distribution list is

printed after you've registered a newly received serial issue.
You may of course adjust the layout of these templates in MS Word.

If the printing of distribution lists to Word templates is not desirable, then you'll still have the option of printing the old "DOS" way. Adlib does this automatically if the template in the current language cannot be found. So, just move the *Circlist#.dot* files to another folder, if you wish not to employ them. A few layout characteristics for the "DOS" way of printing can still be set in the *Layout distribution list* data source, but you'll have significantly fewer options than in Word templates.

8.7. Printing linked titles per distribution list per reader

The output format *Overview of linked titles per distribution list per reader* can be found in the *Readers* data source. Search and mark the readers for whom you wish to print this overview, open the *Print wizard* and choose *Create a report with a predefined output format*, after which you can select the output format. Of each reader, the distribution lists to which the reader is subscribed are listed, and per distribution list the serial titles are listed to which that distribution list is linked. This provides a quick overview of the titles that each reader receives.

The adapl that collects the data is named *readers.ada*; this adapl uses the *CircListsAndTitlesPerReader.dot* template to print to.

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