

City University of New York (CUNY)

CUNY Academic Works

Meeting Minutes

Library Association of the City University of
New York

2006

LACUNY Serials Roundtable Meeting Minutes, July 2006

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CUNY+ Serials Committee
Meeting Minutes
Wednesday, July 12, 2006

ATTENDEES

BB Mike Waldman
BM Mona Wasserman
BX Thomas Riker
BC Sally Bowdoin
CC Martin Helgesen
CL
GC Jane Fitzpatrick, Melissa Longhi
HO Jean Boggs, Lisa Tappeiner
HC Lisa Finder
JJ Dolores Grande
KB Roberta Pike
LG
LE Carol Gee
ME Ching Chang
NY Monica Berger
QC Belinda Chiang, Ronnie Gomez
QB Barbara Bonous-Smit
SI Judy Xiao
YC Hope Young
CO Pat Young, Larry McCue

MINUTES

1) Claims

CUNY is the first Ex-Libris library to send serials claims to EBSCO via EDI. The three participating colleges are John Jay, NYCCT, and Queens.

Detailed procedures for claiming via EDI are outlined in this memo from Susan O'Leary:

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"The invoice load and X12 claim interfaces are different. They each have a different 'hook'.

The invoice load process requires that EBSCO have the ALEPH Order Number as the match point. The ALEPH Order Number must reside in EBSCO's order records.

In order to send us the ALEPH Order Number, our office will send an EXCEL file to the library. The file contains the EBSCO order number, the journal name, ISSN etc. The last field is for the ALEPH Order Number. The librarian adds the ALEPH information to the file and sends the file back to my attention. We then use a robotic program to electronically add the ALEPH numbers to our records. Once added we can then produce an invoice that has the ILS# (i.e., ALEPH Order Number) and then the invoice download files are sent.

The X12 EDI claims uses the EBSCO Subscription identifier as the 'hook'. This information must be added to the ALEPH records. It consists of the full nine digit account number, the subscriber code, and the title number. For instance, the Graduate school's account number would be TN3672000 and sometimes TN3672007 (this account is used for some of the special e-journal packages).

The subscriber code stands for the shipping address, generally this is

"AG" but there might be others in use. So the Subscription identifier would be TN3672000AG123456789 (with 123456789 representing a title number). The EBSCO identifiers are presented as bar codes which can be scanned into the ALEPH records.

According to instructions, the field is called the Vendor Order Number field of the ALEPH Subscription record."

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Monica Berger reminded the committee that some maintenance is required as the staff must track title changes.

2) Patterns

Sample patterns were successfully moved from admin to holding for Queens College.

853/853X have been moved from the admin to holding record in production for QC, HC, and BC.

Tip from Belinda Chiang:
To edit the public schedule in cataloging:
-- Highlight 853X or hold record
-- Edit
-- Preview public schedule

Belinda distributed a handout on major pub pattern changes from Version 14 to Version 16. The committee requested that Roland Samieske put the form on the OLS Aleph site.

(Note: Monica shared information on the new serial holdings standards in an email to the committee on 7/24/06.)

3) Pat Young can provide statistics reports based on serials check-ins. She can also provide reports by title (runs by sublibrary and date) which will include standing orders.

4) There is a problem with opening new volume check-in records. It should show on expired action report. In Ver.14, rollover began a new year when the last issue of a volume was checked in. In Ver.16, it does not open the next volume. Dolores Grande is to send Pat an example.

5) Service packs and test scripts:
The first service pack was installed in trainlms. The second will be loaded soon.

Testers are needed for serials! Testers should do basic daily routines:
- open expected issues
- check in
- claim
- print
- binding (if applicable)

Be careful not to actually send orders.

Please let Pat know if you've tested these functions. Especially alert her to any problems.
(Note: Thank you to Ronnie Gomez for testing since the meeting).

6) There was a glitch in Rel.16 with the "expected arrival date" field. In items on standing orders, the field should not be filled in. This was

corrected by Ex-Libris in early May. Orders prior to May 1 can be retrospectively corrected by "arriving" the item.

7) The next CUNY+ Serials meeting will take place on:
Wednesday, October 18th at 10:00 a.m.