

4.14 ROUTING LISTS FOR SERIALS

Upon the receipt of a new issue of a serial, some libraries send the new issue for routing among the employees of the institution that the library is part of. If you wish to specify the order of employees, in which they receive the issue of the serial, you can define the routing for that serial. Based on the routing details, you can then record the routing of the individual issues of the serial and prepare different lists to follow the routing order.

4.14.1 Setting up routing lists for serials

The routing list for serials is specified separately for each year (accession number).

Procedure

1. Select the **Routing lists** class, and then use the method **Class / New object**. The **Field 996/997** search window will open.

2. Find and select the serial. (Note: You can only select one field 996/997 or one accession number!)

The **Routing lists** editor window will open.

If a routing list already exists for that accession number, a warning message will appear. If you wish to specify several routing lists for the same accession number (e.g. by departments of employment of the library members), click the **Yes** button to answer the question "Do you want a new list to be created?".

3. You can enter the following data:
 - Under "List ID", enter an ID of your choice (e.g. *Accounting*), if you want to specify several lists for the same accession number.
 - Under "To be forwarded within", enter the issue's routing period for each library member (e.g. 3 for 3 days).
 - Under "Note", enter a note.
 - Under "Type of routing", select the type of routing for the issue; the default value is set to *Copy returned to library at the end*, i.e. the value you selected during the last creation of the routing list.
 - Use the "Valid" radio button to indicate the list's validity; the default value is set to valid.
 - Use the **Members** tab to specify the list of members that participate in routing. Click the **Add** button to open the **Member** search window, and use it to find and select member.

To change the order of the library members on the list, click the Routing sequence button.

4. To save the data, click the **OK** button.



Note:

A routing list must be created for each field 996/997 individually. It is not possible to copy an existing routing list to a new field 996/997.

4.14.2 Deleting routing lists

Condition

A routing list can be deleted if there is no routing recorded for the accession number.

Procedure

1. Find the list in the **Routing lists** class.
2. Use the **Object / Delete routing list** method to delete the routing list.

4.14.3 Preparing a new routing list

When a new issue of a serial arrives to the library, you have to process it first (e.g. fill in subfield 997m). If you recorded the receipt of an issue with a manual entry to subfield 997m and a routing list already exists for that field 997, a warning message will appear when you exit the editor.

If you use **Serials check-in** to record the receipt of the new issue, the **Routing** editor window will appear once the subfield 997m is updated successfully and if a routing list for that serial already exists (see description below).



Note:

A routing list is the precondition for recording the routing of an issue. In case of an issue of a new year for which you have to add a new field 997, you have to specify a routing list for that accession number first.

Procedure

1. In the **Routing lists** class, find and select the routing list for the issue.
2. Select the **Object / Prepare new routing** method.

The **Routing** editor will open. The data you entered when specifying the routing list (accession number, list ID, note, list of members) will be transferred to this window. If you recorded the issue's receipt with the **Serials check-in**, the issue number will be displayed as well.

3. You can enter the following data:
 - Under "Due date" enter the estimated due date. The data is mandatory. If the type of routing is set to *Copy returned each time to library*, adequacy of the date is automatically checked depending on the routing

due date (for the member) and depending on the number of members on the routing list. If the due date is earlier than the date calculated by the formula *Routing starting date + (Due date (for the member) X number of members)*, a warning message will be displayed.

- Under "Issue number", select the issue after you open the **Select issue** window by clicking the **Select issue** button.
- Under "To be forwarded within", enter the number of days planned for each member.
- Under "Note" you can enter any note that will be included in the routing list.

To change the order of the library members on the list, click the Routing sequence button.

4. To save the data, click the **OK** button.

The routing details for the issue will be saved to your workspace.



Note:

The routing status for the issue is in preparation, because you can still edit the routing details.

4.14.4 Sending an issue for routing

An issue can be sent for routing in two different ways, depending on how your recorded its receipt. If the receipt was recorded manually, you have to use the **Send for routing** method after you create the routing.

Procedure

1. In the **Routing** class, find and select the routing for the issue and load it onto your workspace.
2. Select the **Object / Send for routing** method.

The following question will be displayed: "Do you wish to send the issue for routing and print out the list?"

3. If you click the **Yes** button, the issue is sent for routing:
 - the **Overview and sending of created report** window will open, where you can print out a list of members, subscribed to the serial; the list is routing with the issue itself
 - the issue with the status *K – routing* will be recorded for the first member from the routing list
 - the routing status will change automatically to *2 – routing*



Note:

An issue cannot be send for routing, if it is on loan, already routing or if its status or availability level is not permitting loan.

The procedure of sending the issue for routing itself is the same for routing with returning and for routing without returning to the library. The only difference concerns calculation of the due date: for routing with returning to the library the due date which applies to the member is taken into account while for routing without returning to the library the due date specified for that routing is taken into account.

4.14.5 Routing with returning each time to library

When sending to routing with returning each time to library every member always returns the issue to the library where you can lend the issue to the next member on the routing list after recording returning of the issue.

Procedure

1. Select the **Material on loan** class and select the **Class / Return, delete** method.

The **Search by key** window will open.

2. Enter ID number of the issue or use the reader to enter it.

The **Home library material** window will open for the member who borrowed that issue. The issue whose identification number you entered is already selected, the **Return** button is active, so returning of the material can be confirmed by pressing the <Enter> key.

3. The **Assign to routing** window will open where the next member on the routing list who will receive the issue is already selected.

If the member who returns the issue is the last on the list, no member is selected.

4. Confirm or change the selection of the member.

The issue is recorded (as put on loan) for routing for the selected member. If you selected no member, the routing is closed and issue will get the status available.

4.14.6 Recording the end of routing

To record the end of routing, delete the issue from the member's material records once it is returned. Routing with returning each time to library is finished when the issues returned by the member from the list is not sent to further routing.

Procedure

1. Highlight the **Material on loan** class and select the **Class / Return, delete** method.

The **Search by key** window will open.

2. Enter ID number of the issue or use the reader to enter it.

The **Home library material** window will open for the member who borrowed that issue. The issue whose identification number you entered is already selected, the **Return** button is active, so returning of the material can be confirmed by pressing the <Enter> key.

For routing with returning each time to library the **Assign to routing** window will open. If you wish to close the routing, do not select any member from the list.

3. To close the **Home library material** window, click the **Close** button, or press the <Esc> key.

The routing status will change automatically to *0 – closed*.

Options...

You can also record the end of routing in one of the following ways:

- find the member, for whom the material is recorded (e.g. from the **Members** relationship), and then record the return within the **Home library material** window,
- find the issue in the **Material on loan** class and use the method **Object / Return, delete** on your workspace.

If you have several separate lists of members for the same accession number, check if the issue routed through all the lists. The procedure is as follows:

Procedure

1. In the **Routing lists** class, find and select all lists for the given accession number.
2. Select an individual list and use the Show button to open the **Viewing – Routing lists** window, where you can see from the relationships whether the given issue already routed through the list or not.
3. Select a list that the issue hasn't routed yet. Once it loads onto the workspace, send the issue for routing.
4. If the issue finished routing through all the lists, it can be returned to the shelf.

4.14.7 Cancelling routing

Condition

To cancel the routing of an issue, you can use the method for deletion, if the routing status is *1 – in preparation* or *0 – closed*.

Procedure

1. In the **Routing** class, select the method **Search**.
Find and select the routing.
2. Use the **Object / Delete routing** method to delete the routing.



Note:

If the issue already started routing and you wish to cancel the routing, you have to record the end of routing, and then use the method for deleting routing.

4.14.8 Routing lists and notifications about routing period expiry dates

You can prepare routing lists for the member, a routing list for serials and notifications for the member about the routing period due date.

Routing lists for members

Procedure

1. In the **Member** class, find and select the member and save the member to the workspace.
2. Use the method **Object / Show routing details for the member**.

Routing lists for serials

Procedure

1. In the **Routing lists** class, use the method **Send**.
2. Find and select one, more or all serials.
3. In the **Report definition selection** window, select *Routing details for serials*.

Notifications about routing period expiry dates

Procedure

1. In the **Member** class, use the method **Send notif. about routing period expiry date**.
2. A notification will be sent by e-mail to the **business** e-mail address of the member who currently has the issue in routing.