

ELOQUENT SYSTEMS INC

Eloquent Librarian™ Planning Guide

Volume EL4 – Serials Management and Budgeting



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This manual is designed to guide you in planning the implementation of the Eloquent Librarian software as well as for reviewing at any time you are ready to start using additional features. This volume of the Planning Guide prepares you for performing major functions in the Acquisitions Module.

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Introduction to the Guide

Who should read this guide?

The Planning Guide is for anyone preparing to use the Eloquent Librarian software. It provides a good overview of the system. With that knowledge you know what menu items to use for any function. You can then rely on the online HELP for each item on your menu and for every entry prompt on all the web forms.

When should it be read?

The entire volume should be read prior to implementing the software or getting any training from Eloquent. Your request for training can be more specific. You understand the options available and can plan for custom tailoring to better fit the workflow in your organization.

You should read specific sections again after a few months of operation – when you are ready to start implementing features that were not essential at the start. Any new employee should read the relevant volumes and sections prior to being trained.

Where else can I get help?

You also can take advantage of the following support provided by Eloquent Systems:

- [Tutorials](#) available on the Eloquent Website,
- You may log in as a [Read-only User](#) to access all the same menu items, but with the safety of not having the ability to add/modify any data.
- Just-in-time [remote training](#) for coaching on each new component as soon as you are ready to use it, and
- [Hotline support](#) after the system is installed and in operation.
- A few hours of [Professional Services](#) are free for the implementation and training for each new application or module. Additional hours may be purchased for data migration or for extensive custom tailoring.

What volumes are specific to the Eloquent Librarian application?

1. Volume EL1 - Public Access
2. Volume EL2 - Cataloging and Digital Content
3. Volume EL3 - Circulation, Booking, Inventory & Fines
4. Volume EL4 - Serials Management and Budgeting
5. Volume EL5 – Acquisitions and Budgeting

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What volumes apply to all WebSuite applications?

1. Volume WS1 - Administrator Functions
2. Volume WS2 - Managing Authority Files
3. Volume WS3 - Structuring Data for Output
4. Volume WS4 - Pointers, Hierarchies & Hyperlinks

What is this volume about?

This volume covers the process of placing one or multiple-year subscriptions for journals, processing them as they arrive, claiming for those that did not come on schedule, bar-coding for normal circulation, and managing standing reserves for new arrivals (or routing lists). It also covers budgeting and budget reports.

Getting Started

How do I get an overview of all menu items for the Serials Module?

You can log in as the user **Serials Read-only** user (no password required) to get a feel for the

Serials

Setup

[Enter/edit routing list](#)

[Enter/edit frequency](#)

Clean up temporary records

[Delete temporary usage records](#)

[Delete temporary copy records](#)

[Delete temporary issues/volumes records](#)

Order

[Add/edit volumes](#)

[Enter/edit subscriptions](#)

[Enter/edit electronic subscriptions](#)

[Process subscription orders](#)

[Search/send subscriptions orders](#)

[Search subscriptions](#)

Receive issues

[Search/process usage records](#)

[Check-in received issues - barcoded](#)

[Check-out received issues](#)

[Search/Claim overdue issues](#)

[Change due dates](#)

Budget

[Allocate budget amount](#)

[Budget summary report](#)

[Budget detail report](#)

serials functions without damaging the live database. From the menu window, you can click on the **Help** button to read help for each menu item. You can also get a printout of the help for all menu items. Here is a screenshot of the menu items for the Serials Module.

There are additional menu items for the Journal Cataloging Module:

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Cataloging

[Catalog titles - basic](#)

[Catalog titles](#)

[Catalog titles - custom](#)

[Enter/edit volumes \(batch\)](#)

[Enter/edit issues \(batch\)](#)

[Enter/edit journal articles](#)

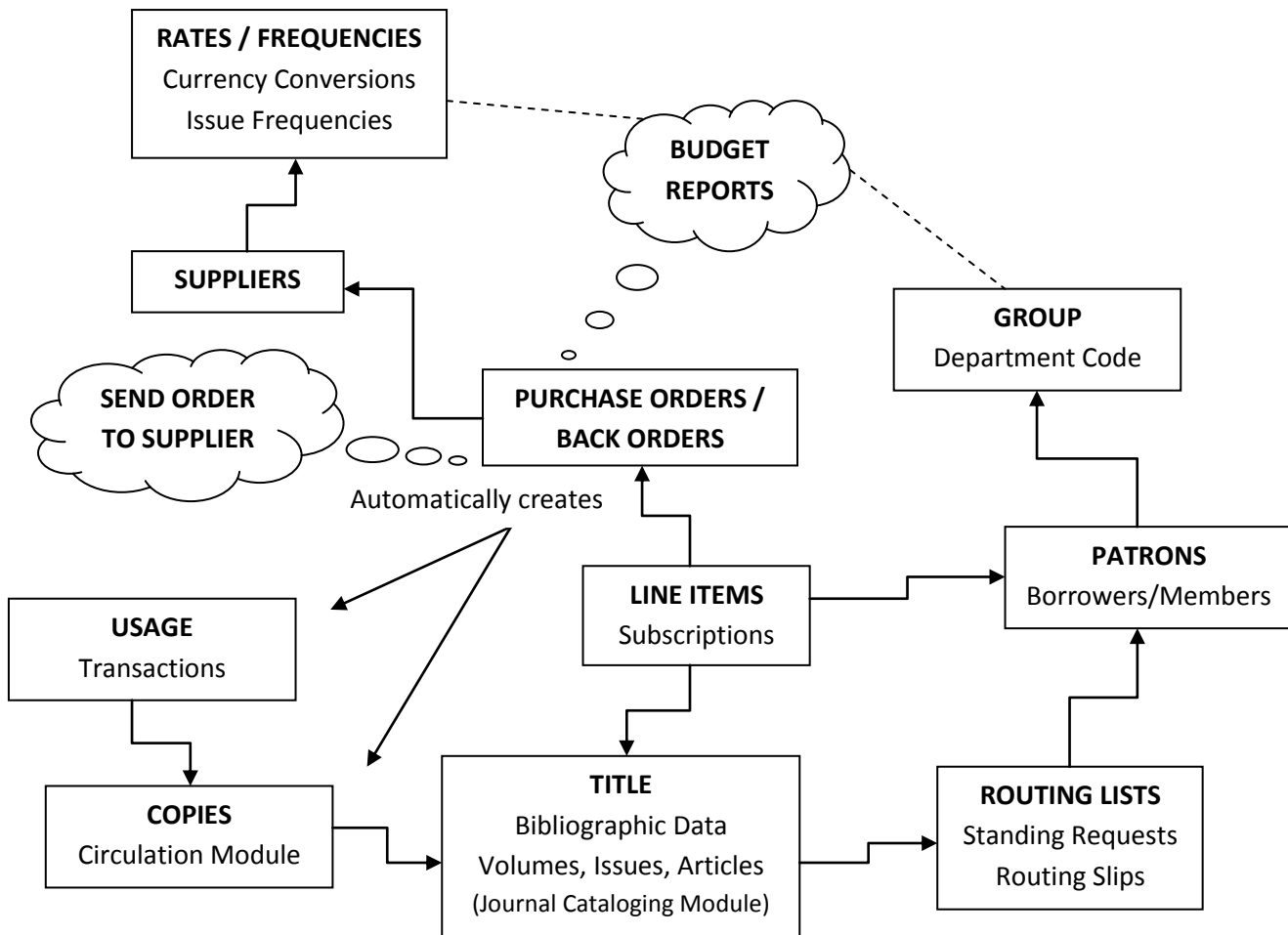
[Search/print/export titles](#)

[Validate and correct web addresses](#)

Journal Cataloging
Module

What tables/files are used for this module?

The following diagram illustrates the files involved and the relationship between the data in them.



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All I want to do is enter all of my issues so clients know what is available. Do I need to purchase the Serials Module?

There is a separate Journal Cataloging Module that allows you to manually enter issues without the full Serials Module. See Volume EL2 - Cataloging and Digital Content for more details.

My journals are already in the database along with the rest of my titles. Do I need to enter them again for Serials?

No. You can link to existing journals, or create new ones on the fly if they do not exist.

How do I enter all of my suppliers?

Go to **Acquisitions menu -> Setup -> Enter/edit supplier**. This is the easiest way to enter all of your current suppliers. However, you can enter a new one on-the-fly as you are adding preparing a new order.

How will costs be allocated to departments?

Every line item on an order is linked to an individual that, in turn, is linked to a department. This associates the cost with the department.

To prepare the table of departments, log in as Administrator, go to **Maintenance -> Support items -> Enter/edit library support (batch)** and select *Group* as the *Table name*. Then go to **Serials -> Budget -> Allocate budget amount** to specify the budget amounts for each department.

Does budgeting manage various currencies?

Yes. A conversion table is maintained by logging in as Administrator and going to **Maintenance -> Support items -> Enter/edit rate table data**. All currencies are based as a percentage off of your local currency.

How does the system keep track of the various frequencies that issues are published in?

Frequencies are entered in the system as the number of days in a single period. The system comes with the main frequencies, monthly, weekly, etc. Go to **Serials -> Setup -> Enter/edit frequency** and select *Frequency* as *Rate type* if you want to add/change/remove frequencies.

Is this module similar to the Acquisitions Module?

Yes, it uses many of the same routines for budgeting and currency conversion. However, Acquisitions is for buying items as soon as they can be delivered. The Serials Module pays for subscriptions for issues of journals that will be published sometime in the future.

Placing Orders/Subscriptions

What are the steps for preparing and sending a subscription?

Go to **Serials -> Orders > Enter/edit subscriptions**. Click on **Create** next to *PO#/ Ref* to fill in the purchase order information, and then proceed to fill in the subscription information. Use the **Search/send subscription orders** menu item for sending. This gives you the opportunity to spend several days preparing and order and observing the total cost prior to sending it.

What kind of information is entered for each subscription?

The following Web form is one option for entering line items for a subscription. It links to an order. If it does not exist you use the **Create** button for the Web form shown on the next page.

Enter/edit subscriptions

Key ?

PO #/Ref * ?

Title * ?

Person * ?

Start date * ? **Renewal date * ?**

Frequency * ? **First Vol number * ?**

First Issue number * ? **Issues/Volume * ?**

Total no. of issues * ? **No. of copies per issue * ?**

Copy loan code * ? **Price * ?**

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The Web form shown below is for entering the Purchase Order Information. The PO Reference is optional. If the field is empty a unique sequential number is created. The Fiscal year directs the costs into the appropriate budget.

Create subscription order

PO number ?

PO Reference (local) ?

Supplier * ?

PO date * ?

Fiscal year * ?

Comments - PO ?

Comments - internal ?

What records are created in the database when the subscription is processed?

Based on the information entered on the subscription, the system will create the appropriate number of volumes, issues, and copies. For each copy record, an On Order usage record is also created. It has an expected due date, so will trigger your claims and printing of bar-code labels..

Do researchers see all the Issues on order?

Yes, unless you disapprove them for public. The copy status will show the expected arrival date.

Can a new journal title be entered ad-hock as I enter a new subscription?

Yes. Click on the **Create** button next to the *Title* prompt. This screen contains fewer fields than the normal cataloging screen; it has only the necessary fields for the order.

Processing Issues

Do I have to print barcodes for each issue in order to use the Circulation Module?

The software can manage circulation of material that is not bar-coded. However, since the copy records and the initial “Out” transaction is automatically created when you process the subscription, printing is recommended.

When do I print the barcodes?

One good approach is to print barcodes for all the issues expected during the current week. Then you simply apply them as the issue arrives. The barcode also contains the name of the Journal and other details. Any labels remaining at the end of the week may require the normal “claims” follow-up.

Standing Requests/Routing

How do I set up standing requests for key clients so they get issues as soon as they arrive?

Got to **Serials** -> **Setup** -> **Enter/edit routing list**.

What triggers the requests?

When you process the subscription, the item is put on hold for the first patron on the request list, and on reserve for the other patrons on the list.

Who is first on the request list for any journal?

The patron at the top of the routing list is the first on the request list.

Do Standing Requests replace Routing Slips?

Yes, but you have both options. To produce Routing Slips, on the **Enter/edit routing list** entry screen, click on Search and then launch one of the Go Processes.

Managing Claims

How does the system anticipate the arrival time of each issue if I do not enter each date?

The system uses the frequency – weekly, monthly, etc. - that you entered on the subscription to create a transaction record in the usage table. It is like any loan record with a due date. An over-due triggers the claim.

Does the system do automatic claims?

Go to **Serials -> Receive issues -> Search/Claim overdue issues** and do a search, most likely a range search of everything that is due before today. From the resulting browse, click on the Suppliers navigation button to get a report that you can send to the supplier, or use to process online.

Budgeting

I get discounts for multi-year subscriptions. Can one subscription be placed for several years?

Yes, simply input the appropriate dates and numbers when entering the subscription.

When I prepare a subscription how does the system know what department to charge it to and what supplier to send the order to?

When ordering, you link to a person and also prepare a purchase order. The person record has a *Group* field which indicates the department; the purchase order contains a pointer field linking to the supplier. The supplier record contains contact information, including an email address if you want to use the system's automatic email feature.

Can I bridge into the next budget year?

Yes. When preparing a purchase order, simply change the **Fiscal year** field, even if it is beyond the PO date.

How and when do budget figures get entered?

Go to **Serials -> Budget -> Allocate budget amount** to specify the budgets. You specify a budget for each department and fiscal year. You can enter the budget figures any time before running a budget report, but they are usually entered at the beginning of each fiscal year.

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What kind of budget reports can I get?







At any time you can request the following report by financial year. It is a summary for all departments and includes the latest order processed. Any foreign currency is converted into the local currency for the report.

Summary for all Departments

| Department | Expended | Budget | Variance | % Var |
|---------------------------|------------|-------------|------------|-------|
| TEC - Technical & Support | \$50.00 | \$100.00 | \$50.00 | 50% |
| HR - Human Resources | \$80.00 | \$5,600.00 | \$5,520.00 | 1% |
| LIB - Library | \$1,765.00 | \$8,000.00 | \$6,235.00 | 22% |
| | \$1,895.00 | \$13,700.00 | | |

A second report shows all the detail for any department. This sample is for the Library Department. All foreign currency is converted to local currency.

Detail for a Department

| PO#/Date | Title | Person | Qty | Amount |
|-------------------|---|---------------------|---------------------------|-----------------------------|
| 9/January 1, 2010 | A Russian journal /  Book | LIB - Berg, Harumi | Tot. iss.12 / Copies 1 | \$260.00 |
| 9/January 1, 2010 | The Journal of William Sturgis /  Book | LIB - Berg, Harumi | Tot. iss.6 / Copies 1 | \$500.00 |
| 9/January 1, 2010 | Student Writing Journal 1997-1998 /  Book | LIB - Coffie, Anne | Tot. iss.12 / Copies 1 | \$300.00 |
| 9/January 1, 2010 | The Fort Langley Journals: 1827-30 /  Book | LIB - Smith, John | Tot. iss.36 / Copies 1 | \$150.00 |
| 9/January 1, 2010 | The curious cage : a Shanghai journal, 1941-1945 /  Book | LIB - Hudson, Ethel | Tot. iss.48 / Copies 1 | \$125.00 |
| 9/January 1, 2010 | The selected journals of L.M. Montgomery /  Book | LIB - Hudson, Lenny | Tot. iss.12 / Copies 1 | \$430.00 |
| | | | | Total: \$1,765.00 |