

Working with Packages & Memberships

Please note that the following conventions are being introduced during FY08 as packages and memberships are renewed.

See <http://www.lib.umd.edu/CLMD/Staff/journalpackages-old.pdf> for the previous conventions if you cannot find what you are looking for by using the following steps.

There will be a period in which both conventions are in use as records are being updated.

Part I: Recognizing that a Journal is part of a Package/Membership

If, when searching the Acquisitions/Serials module of Aleph by journal title

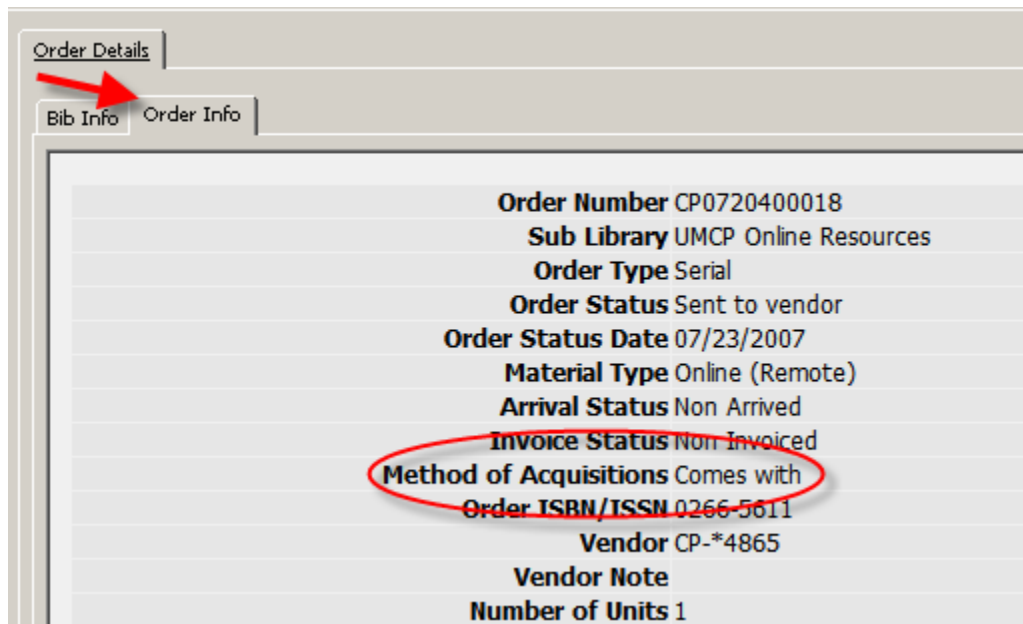
1. Go to **Order Search** (file folder icon in the left pane)
2. Set the **Index** field to Title (TTL)
3. Set the **Sublibrary** to CP*
4. In the **Enter Starting Point** field, type journal title, e.g., *Inverse Problems*
5. Click **Refresh Filter** or press the Enter key.

The screenshot shows the Aleph Order Search interface. On the left, there is a sidebar with a file folder icon labeled '1' and a tree view containing 'Order Search' and 'Index List'. The main search area has several fields: 'Index' set to 'TTL' (labeled 2), 'Sublibrary' set to 'CP*' (labeled 3), and 'Enter Starting Point' set to 'inverse problems' (labeled 4). There is an 'Exact Match' checkbox and 'Refresh Filter' (labeled 5) and 'Clear Filter' buttons. Other fields include 'Vendor Status', 'Arrival Status', 'Invoice Status', 'Rush', and 'From/To Order Date'.

1. the **Order Details** at the bottom of the search results screen have tabs only for Bib Info and Order Info and no tabs for Invoice, Expenditure or Encumbrance as below,

The screenshot shows the 'Order Details' screen. At the top, there is a tab labeled 'Order Details'. Below it, there are two sub-tabs: 'Bib Info' and 'Order Info'. The 'Bib Info' sub-tab is selected, and the search results display the text: 'Inverse problems. Bristol, England : Institute of Physics, c1985- 0266-5611'.

2. Or, the **Order Info** tab indicates that the **Method of Acquisitions** is “Comes with”

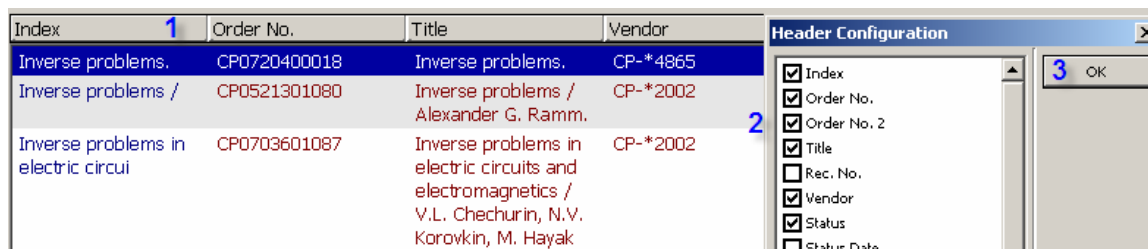


the title may be received as part of a package subscription or as the result of an institutional membership.

Part II. Identifying all the Titles in the Package/Membership

To identify the name of the package or of the organization, additional titles (if any) in the package or membership, and the payment history for the package or membership:

1. Place your cursor over the header row in the central pane of your initial search results and right click.
2. In the Header Configuration window that opens, click on Order No. 2 to select it.
3. Click on OK.



The Order No. 2 information will display.

Index	Order No.	Order No. 2	Title	Vendor	Status
Inverse problems.	CP0720400018	CP9902600041	Inverse problems.	CP-*4865	SV
Inverse problems	CP0521301080		Inverse problems	CP-*2002	CLS

Re-do your search using the second order number as your search term.

1. Using the drop-down menu, change the **Index** to Additional Order Number 1 (GON)
2. Enter the letters and numbers in the Order No. 2 column in **Enter Starting Point**
3. Click **Refresh Filter** or press the Enter key

Index List

Index: **1** GON Enter Starting Point: **2** CP9902600041 **3**

Exact Match

Sublibrary: CP* Vendor Status:

All the orders that have the same Order No. 2 will be part of the same package or will be associated with the same membership. The name of the package or membership will have the same number for both the Order No. and Order No. 2.

Index	Order No.	Order No. 2	Title	Vendor	Status
CP9902600041	CP0720100026	CP9902600041	New journal of physics [electronic resource]	CP-*4865	SV
CP9902600041	CP0720100027	CP9902600041	Journal of optics. A, Pure and applied optics : journal of the European Optical Society	CP-*4865	SV
CP9902600041	CP9902600041	CP9902600041	Institute of physics. package z journals	CP-*4865	SV
CP9902600041	CP0412180007	CP9902600041	Chinese physics	CP-*4865	SV

To generate a full list of the titles, click on the final entry with the correct Order No. 2 to select it. Press the F11 key. A window will open for printing or, by right clicking on the window, for exporting (to Excel, for example).

Click on the package or membership order itself and click on the Expenditure tab to display the payment information for the package or membership.

Index	Order No.	Order No. 2	Title	Vendor	Status
CP9902600041	CP9902600041	CP9902600041	Institute of physics, package z journals	CP-*4865	SV
CP9902600041	CP0412100007	CP9902600041	Chinese physics letters = Zhongguo wu li kuai bao / edited by the Chinese	CP-*4865	SV

Order Details					
Bib Info	Order Info	Invoice	Expenditure	Encumbrance	
	Budget Code		Amount		Local Price
	CP-08-J31-2004		49798.00		49798.00
	CP-21-137-2005		54281.00		54281.00

Part III: Searching Aleph by Package or Membership Name

1. Set **Index** to Title (TTL)
2. In the **Enter Starting Point** field, type the package or membership name. For example, American Library Association.
3. Click **Refresh Filter**.

Index List					
Index:	1	TTL	Enter Starting Point:	2	american library association
				3	
			<input type="checkbox"/> Exact Match		
Sublibrary:		CP*	Vendor Status:		

Payment information will be associated with this package or membership name order.

Again, the Order No. for the package or membership will be used as the Order No. 2 for all the titles received in that package or as a result of that membership.

Index	Order No.	Order No. 2	Title	Vendor	Status
American library association member	CPS01397	CPS01397	American library association membership	CP-*5476	SV
American library	CP8700011969		American library	CP-*4785	SV

As above, to see the parts of the package or membership, 1) Change the **Index** to Additional Order Number 1 (GON); 2) In the **Enter Starting Point** field, type the package or membership Order No.; 3) Click **Refresh Filter**.