USING WORKFLOWS REPORTS IN SERIALS MANAGEMENT

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APPLICATIONS:

• Gathering Statistics
• Compiling Lists
• Processing Claims
• Loading Invoices
Gathering Statistics:

- **Count Serial Control Records**
  Serials Group - (serctlcnt)

- **Count Serial Receipts**
  Serials Group - (receiptcnt)

- **List Titles Used**
  Administrative Group - (titleuselist)
Compiling Lists

• **Serial Control Records**
  Serials Group - (serctlillist)

• **Serial Control Records-Tab**
  Custom – (sl2023)

• **Serial Controls By Item**
  Serials Group - (serctlitemlist)
• **List Items**
  Bibliography – (itemlist)

• **List Serial Predictions**
  Serials Group – (predictionlist)

• **Title Cost By Library/Fund**
  Acquisitions Group – (fundtitlecost)
Processing Claims:

• Prediction As Late
  Serials Group - (issuelate)

• Serial Claim Notices

• Serials Group - (serclaimntc)

• Count Serial Claims

• Serials Group – (serclaimcnt)
Loading Invoices:

• EDI File Receipt
  EDI Group - (edireceive)

• Serials X12 Invoices
  Serials Group - (serinvoicex12)
General Tips:

• Know what you need
• Find report that best meets your need
• Consult with your Systems Administrator before running report for first time
• Test report in Training before Production
• Save as Template