

# Unpredictability is the New Predictability: Evergreen Serials Module Walkthrough

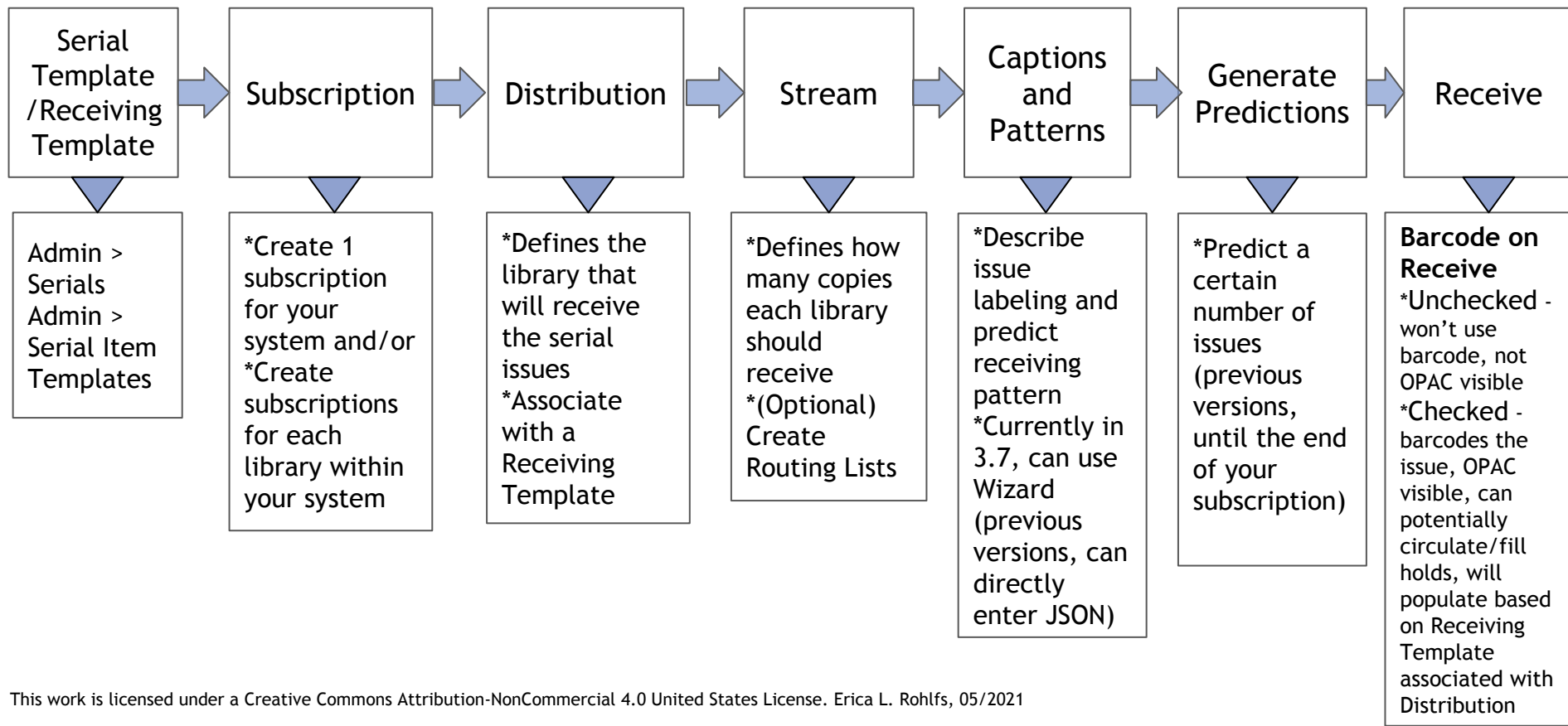
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# Thank You

Thank you for being here with us today. Also, thank you to our families and colleagues who helped make it possible for us to be here together.

# Serials Flowchart



# Serial Item Templates / Receiving Template

- Administration > Serials Administration > Serial Item Templates
- a. k. a. Receiving Template
- When you receive a barcoded issuance, a copy (holding) is also created. The template helps to define the parameters for these holdings (such as shelving location and circulation modifier)
- Can use in conjunction with Library Setting: Previous Issuance Copy Location
- Permission: Admin\_Asset\_Copy\_Template
- If a template is not defined on your distribution, and you Barcode on Receive, you will see “Receiving Template not set; needed to barcode while receiving”

# Manage Subscriptions

- Owned By - who owns the subscription (system / individual library) (required)
- Start Date - start of the subscription (required)
- End Date - end of the subscription (optional)
- Expected Offset - defines the difference between the publishing date and the date you expect to receive your issue (optional)
- Label - name of the Distribution (required)
- Distributed At - which library will receive the issues (required)
- OPAC Display - Choose between Chronology or Enumeration; tells Evergreen how to order/display your issuances in the OPAC; Library Setting: Default display grouping for serials distributions presented in the OPAC
- Receiving Template - required for barcoded receiving
- Send to - part of the stream (formerly known as “Routing Label”); naming easily confused with routing list; (optional)

# MARC 21 Format for Holdings Data (MFHD)

- Within the bibliographic record > Serials > Manage MFHDs
- Describe your library's holdings in a single statement
- 852b (sublocation/collection) automatically fills in
- Textual Holdings
  - 866 - Basic
  - 867 - Supplementary
  - 868 - Index
- Captions and Patterns
  - 853 - Basic
  - 854 - Supplementary
  - 855 - Index
- Enumeration & Chronology
  - 863 - Basic
  - 864 - Supplementary
  - 865 - Index

# Captions and Patterns

- Currently in version 3.7, can only use the wizard (enter JSON at database level)
  - Previous versions, could import and/or directly enter JSON as end user
- Captions and Patterns wizard guides you through entering caption and pattern data as it is described by MARC 853 (Basic), 854 (Supplement), and 855 (Index)
- Describe how the issues will be labeled (captioned) within the OPAC view and predict the receiving pattern of the serial issues
  
- Helpful Websites:
  - [LOC 853-878 - Holdings Data-General Information](#)
  - [LOC MARC 853-855 - Captions and Pattern-General Information](#)
  - [OCLC's MARC 21 Format for Holdings Data \(MFHD\)](#)
  - [Evergreen Wiki Sample sets of serial patterns](#)

# Additional Information

- Library Setting: Use fully compressed serial holdings, effects the way your **Issues Held** display in the OPAC
- Permissions:
  - ADMIN\_SERIAL\_CAPTION\_PATTERN
  - ADMIN\_SERIAL\_DISTRIBUTION
  - ADMIN\_SERIAL\_ITEM
  - ADMIN\_SERIAL\_PATTERN\_TEMPLATE
  - ADMIN\_SERIAL\_STREAM
  - ADMIN\_SERIAL\_SUBSCRIPTION
  - ISSUANCE\_HOLDS
  - RECEIVE\_SERIAL



# Serials Bugs

- [It should be possible to create serial patterns from bib field 891 \(per CONSER\)](#)
- [Deletion of bib record should delete associated serials data](#)
- [Target audience incorrectly defined as a fixed-field attribute for serials](#)
- [Webclient Serials: cannot edit the expected date of the issuance](#)
- [Serials: Copy templates should allow staff to set default values for copy stat cats](#)
- [web client serials: add Notes fields to column pickers](#)
- [Web Client: Serials - Manage Issues "Filter" Button Should Be Sticky](#)
- [Web client serials: Multiple active patterns not working](#)
- [Web Client: Serials - Predict New Issues Ignores Entered Values](#)
  - [Web Client: Serials - Prediction Pattern Change can Lead to Odd Behavior in "Predict New Issues" Dialog](#)
    - [Web Client: Serials - Predict New Issues Defaults to Previous Pattern](#)
- [Wishlist--That the presence of serials holdings summaries or MFHD record would be treated as if items were present](#)
- [Bibliographic Record with MFHD record should not be deletable](#)

## Aesthetic Issues

- [serials org unit selector broken](#)
- [Serials subscription fields alignment](#)
- [Serials Template Column Mint Condition should be relabeled to either Quality or Good](#)
- [Web Client: Serials: Sticky Help Buttons](#)

# Serials Bugs continued

## Functionality / Other

- [Angular catalog serials menu doesn't include Quick Receive](#)
  - [Web Client: Cannot Select Issuance in Quick Receive](#)
- [Angular staff catalog: patron view doesn't show serials issues held](#)
- [deleting a serials template fails with no feedback](#)
- [Deleting serials issuance deletes item but leaves empty call number](#)
- [Grid values in the serial subscription interface are not localized](#)
- [The Serials, Mark For, and Other Actions dropdowns in the staff catalog can't be navigated by keyboard](#)
- [Serials - Newly created manual MFHD don't display](#)
- [web client serials: adding item alert note requires refresh to display correctly on receive](#)
- [web client serials: create subscriptions fails silently unless date is YYYY-MM-DD](#)
- [Web Client Serials: Issuances marked claimed cannot be received](#)
- [web client serials: remove public checkbox from alert](#)
- [Webstaff serials: when the only subscription is at a parent OU, automatically select it](#)

## Wishlist

- [Serials - list of predictions gets really really long](#)
- [Serials - web client: need ability to set a subscription inactive so it doesn't appear in dropdown](#)
- [web client serials: wishlist for extra units](#)

# Thank You!

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