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**

1. **Serial Template / Receiving Template**
   - Admin > Serials Admin > Serial Item Templates

2. **Subscription**
   - *Create 1 subscription for your system and/or
   *Create subscriptions for each library within your system

3. **Distribution**
   - *Defines the library that will receive the serial issues
   *Associate with a Receiving Template

4. **Stream**
   - *Defines how many copies each library should receive
   *(Optional) Create Routing Lists

5. **Captions and Patterns**
   - *Describe issue labeling and predict receiving pattern
   *Currently in 3.7, can use Wizard (previous versions, can directly enter JSON)

6. **Generate Predictions**
   - *Predict a certain number of issues (previous versions, until the end of your subscription)

7. **Receive**
   - Barcode on Receive
     - *Unchecked - won't use barcode, not OPAC visible
     - *Checked - barcodes the issue, OPAC visible, can potentially circulate/fill holds, will populate based on Receiving Template associated with Distribution

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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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