Adding Local Serials for Duplication

# Process overview

KLAS now supports Duplication of locally-produced Serial issues. To add a new Serial or Serial Issue for duplication, follow this process (more details on each step are below):

1. For Gutenberg libraries, the **UID** of the recording **must match** the Serial KLAS ID and issue name. For example:
	* UID: us-nls-nv1a-SER\_SLN9-June\_2020
	* KLAS ID: SER-SLN9 Issue Name: June 2020

We recommend setting the filename of the zipped file containing the recording to match as well, so that it is easy to find files if needed in the future.

1. Upload the file to your Gutenberg’s “DBlocal” folder.
2. Create or Find the DB Serial record.
3. Add the Issue, **making sure that the issue name matches the UID**.
4. Wait overnight for the eDoc to populate, then Seed Serial.

Duplication Patrons can be subscribed to a Serial any time after the Serial record has been created, even if no eDocs have been created yet. Once the Serial has one or more issues with eDocs, the patrons that are subscribed to the Serial will begin receiving issues.

Circulation process:

* + When you Seed Serial, the issue(s) will be added to the patrons’ Request lists as Serial Reserves.
	+ A nightly program in the batch manager will “push” the Serial Reserves to the top of the patrons’ Service Queues.
	+ Serial Issues on the Service Queue will then be eligible to be included in Duplication Orders, to be duplicated and mailed to the patron when they are eligible for service.

# Step One – Serial Issue UID

## The UID

KLAS will automatically generate an eDoc linking the recording file to the Serial Issue record, but to do so, the **UID must match** according to its internal logic.

The UID is an internal identifier that is created in the .opf file when the recording is compiled in the Hindenburg software. In a text or code editor, it looks like:

<dc:Identifier id="uid" scheme="DTB"> **us-nls-nv1a-SER\_SLN9-JUNE\_2020**</dc:Identifier>

The UID can be **either** “us-nls-[libID]-[Serial KLAS ID]-[Issue Name]” **or** “us-ntwk-[libID]-[Serial KLAS ID]-[Issue Name]”.

## Spaces and Punctuation

KLAS can translate underscores into *either* dashes or spaces when encountered in a KLAS ID or Issue Name.

* ...JAN\_2020.zip matches an issue name of either “JAN 2020”or “JAN-2020".

However, it can’t translate underscores to both dashes *and* spaces in the same filename.

* ...NOV\_DEC\_2019.zip does *not* match “NOV-DEC 2019”
* ...NOV\_DEC\_2019.zip *does* match “NOV-DEC-2019”or “NOV DEC 2019”

## The Filename

For Gutenberg, the Filename of the recording and zipped folder are not checked and are not *required* to match. However, we *recommend* that you name the zipped folder to match the KLAS ID and issue name.

This will make it easy to find the file later if you need to replace it with a corrected version or remove an outdated issue that you no longer want to circulate.

# Step Two – Upload the file

On your Gutenberg, there is a shortcut to a folder called “DBlocal.” (The full path is /DTBooks/Books/DBlocal/.) All local books and magazines should be placed in this folder.

If you need assistance or have questions about loading local files onto your Gutenberg, these are best directed to NLS.

# Step Three – Serial Record

The Serial Record in KLAS must be set up for the DB Medium. The same Serial record can circulate issues to *both* Physical Circulation and Duplication Service patrons—KLAS will be able to tell how the patrons should receive the Serial based on their DB Medium delivery type.

If there is no defined Spec Retention, KLAS will serve the serial starting with the oldest issue with an eDoc, no matter how many are added afterwards—you might consider making sure all local serials are given a retention limit, so that KLAS will start with more recent issues.

When setting the Caption Pattern, keep in mind the need to match your UID with the Issue Names following the conventions in Step One. For example, the pattern settings below will be consistent and easy to match when you name your files, and conform to the Serial ID-Issue Name format.



# Step Four – Add the Issue

If you are also adding physical copies of the Serial:

* + Use the Receive Issue function in the Serials Module to add the new issue. Make sure that you give it an Issue Name that matches the UID or set in Step One.

If the Serial is duplication-only:

* + Go to the Issues tab of the Serial Record. Use the Add Record button to create the new Issue. Make sure that you give it an Issue Name that matches the UID set in Step One.

# Step Five – Wait for the eDoc

KLAS automatically matches up files to records overnight; as part of this process, it will add an eDoc to the Serial Issue added in the previous step.

Once the eDoc is in place, go back to the new Serial Issue records, and use the Seed Serials function. This will “push out” the issue to subscribers with Service Queues.