Adding Local Serials for Duplication

For Scribe Libraries

# 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. The **filename of the zipped file** containing the recording **must match** the Serial KLAS ID and issue name, using one of these conventions:
	* Serial KlasID as the last directory of the path, with the issue name as the filename.

“.../**SER-SLN9**/**June\_2020**.zip”

*or*

* + KlasID as the first part of the filename, then a dash, then the issue name.
	“**SER-SLN9-June-2020**.zip”
1. Upload the file to books.klas.com, following the same process used for local titles.
2. Create or Find the DB Serial record.
3. Add the Issue, **making sure that the issue name matches the filename**.
4. If needed, use Seed Serial to create the Serial Reserves.

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 add the Issue or use Seed Serial, the issue will be added to the patrons’ Request lists as Serial Reserves.
	+ Once the eDoc is in place, nightly will “push” the Serial Reserves to the top of the patrons’ Service Queues.
	+ Serial Issues on the Service Queue will then be included in the next Duplication Order, which will be created once the patron needs service.

# Step One – Serial Issue Filename

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

The two options for filenames are:

* + Serial KlasID as the last directory of the path, with the issue name as the filename.

**Example KLAS ID:** SER-ABC9

**Example Issue Name:** 03 2020

**File path and name:** “.../SER-ABC9/03\_2020.zip”

* + KlasID as the first part of the filename, with an underscore in the ID, followed by a dash, then the issue name.

**Example KLAS ID:** SER-ABC9

**Example Issue Name:** 03 2020

**File path and name:** “.../SER\_ABC9-03 2020.zip”

## 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”

A few more examples:

* ...NOV\_DEC\_2019.zip matches “NOV-DEC-2019”or “NOV DEC 2019”
* ...NOV-DEC\_2019.zipmatches “NOV-DEC 2019”.

# Step Two – Upload the file

Upload the file to the standard books.klas.com file storage:

1. Use your FTP Client to connect to books.klas.com (See QuickTip-UploadLocalTitles for specific instructions).
2. Upload the file(s) to the “public” or “shelf” directory.

Depending on the number of files you have and your internet upload speed, uploading batches of serial issues could take a while and may affect your overall bandwidth in your building. Try uploading files overnight or over the weekend to avoid any slowness.

# 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 filenames or UID with the Issue Names following the conventions in Steps One and Two. 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 filename 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 filename set in Step One.

# Step Five – Seed Serials

Check the Requests tab for the Serial. If adding the issue did not create any Serial Reserves for the new issue, use the Subscribers tab Seed Serial function. This will ensure that all subscribers have a Serial Reserve for the issue.

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

Once the eDoc is in place, nightly will “push out” the issue to subscribers with Service Queues. The Serial Reserve(s) will be placed at the top of the subscriber’s queue, even if it is already full. This will make it the first title on the patron’s next Duplication Order—however, note that the next order will not be created until the patron needs service, and it is possible for other titles to be added on top of the serial issue in the meantime.