Adding Local Serials for Duplication
For Scribe Libraries

# Process overview

KLAS 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 issue name**:
	* Ex: “**June\_2020**.zip”
2. Upload the file to books.klas.com, following the same process used for local titles.
	* Place the file in a **folder** that matches the **Serial ID**. Ex: “.../**SER-SLN9**/**June\_2020**.zip”
3. Create or Find the DB Serial record.
4. Add the Issue, **making sure that the issue name matches the filename**.
5. 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, leftover reserves for old issues will be removed, and the new issue will be added to the patrons’ Request lists as Serial Reserves and pushed immediately 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. This can occur overnight, or on your next weekly serials service day, depending on your settings.

# 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 **Serial KlasID** must be the last directory of the path, with the issue name as the filename.

**Example KLAS ID:** SER-ABC9

**Example Issue Name:** 03\_2024

**File path and name:** “...private/SER-ABC9/03\_2024.zip”

## Spaces and Punctuation

For simplicity, it is best not to use spaces in your Issue names, but if you do, they should be replaced withunderscores for the file name.

* ...JAN\_2024.zip matches an issue name of either “JAN 2024”or “JAN\_2024".

***Do not use*** other punction, such as a number sign (#), quotation marks, or exclamation point. Diacritics and other special characters should also be avoided.

When setting the file name for new issues, make sure that you are consistent and follow the serial’s Caption Pattern.

Be very careful to stay on pattern. A human can tell that “2024\_07” and “2024\_7” are the same thing, but KLAS can’t!

# 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 UploadLocalTitles for specific instructions).
2. Select the “public,” “private,” or “shelf” directory as desired.
	* The Public directory is for files that can be downloaded by non-authenticated users.
	* The Private directory is for files that should only be downloaded by logged-in users.
	* The Shelf directory is for files to be shared with other libraries via the SHELF project.

**Note:** Regardless of directory, your serials are *only* displayed on the WebOPAC at your request.

1. Put the .zip file in a folder matching the Serial ID. For example: private/SER-ABC9/

# Step Three – Serial Record

The Serial Record in KLAS must be set up for the appropriate **Medium**, with a **Serial Type** of Cir / Circulating or Pub / Publication.

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 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—all local serials should be 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.



For more information about all of these considerations, please see the Serials Manual.

# 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 the Issue Name matches the UID set in Step One.

If the Serial is duplication-only:

* + Go to the **Issues** tab (Alt-7) of the Serial Record. Use the Add Record button (Ctrl-n) to create the new Issue. Make sure that the Issue Name matches the UID set in Step One.

After adding the Issue, refresh the record by selecting a different serial and then returning. The new Issue should be listed at the *bottom* of the Issues list. If not, check the selected chronology values, and contact Keystone Support if you need assistance.

# Step Five – Wait for the eDoc, then Seed Serial

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:

1. Open the Serial record to the **Subscribers** tab (Alt-5).
2. Use the Seed Serials function, and select the Yes option to delete existing Reserves.

This will clear any unfilled Reserves for previous issues, make sure all subscribers have the Reserve for the new issue, and push the new Reserve to the subscribers’ Service Queues.

Note any patrons referenced in the error message. The most common cause of errors is that the patron is missing a Service Queue for the Medium of the serial.

1. Review the **Requests** tab (Alt-6). You may need to switch to a different serial record and return to see the most recent information.

Unfilled Reserves can be left in place when a patron unsubscribes. If there are any remaining Reserves for old issues, select and Delete them here (Ctrl-d).

All Active subscribers should have a Reserve for the new issue, and the Reserves should be in SQ / Service Queue status.