Evergreen Serials: Looking Back, Looking Forward

Dan Wells

Remington Steed

Calvin College

Introduction

- Why so serials?
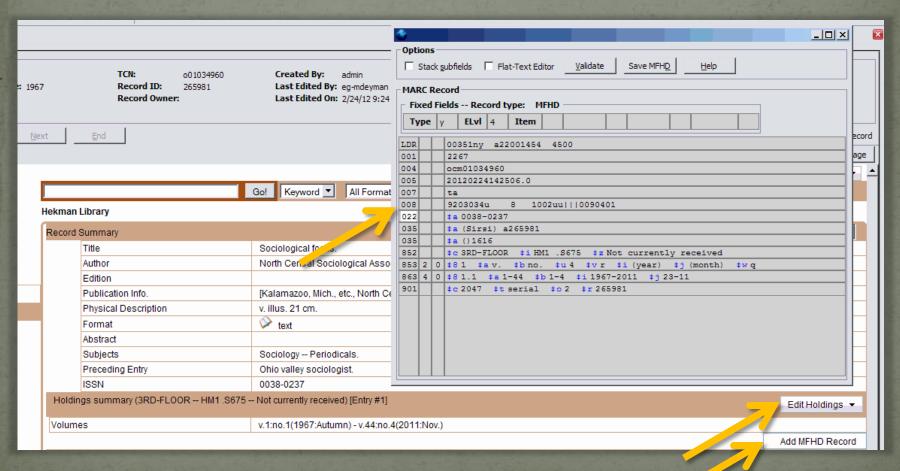
Introduction

- Looking Back
   - Year in Review
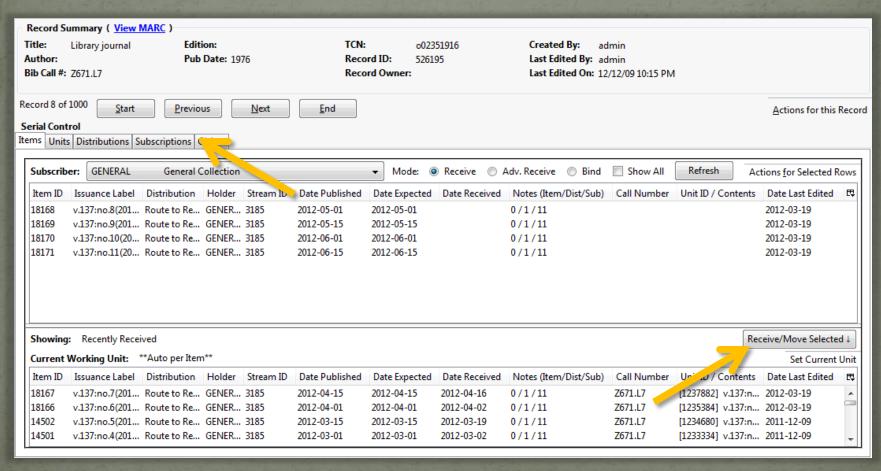   - Looking Forward

Looking Back: An Overview

- Dawn: Serials in Evergreen 1.6
  - **MFHD-Only** phase
  - Fall 2009
  - Ability to add, edit, and display MFHD records

Looking Back: An Overview (cont.)

- Interface example:
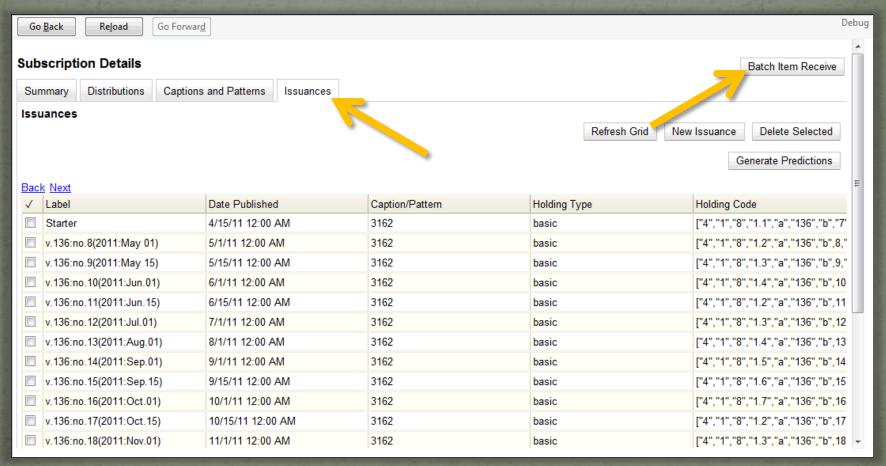
Looking Back: An Overview (cont.)

- Discovery: Serials in Evergreen 2.0
  - **MFHD-Plus** phase
  - January 2011
  - Predicting and receiving of issues, basic display
  - Two serials interfaces
    - Unified underlying architecture
    - Developed from opposite perspectives
      - small academic
      - large public

Looking Back: An Overview (cont.)

- MFHD-Plus Interface example 1:

Looking Back: An Overview (cont.)

- MFHD-Plus Interface example 2:

Looking Back: An Overview (cont.)

- Development: Serials in Evergreen 2.1(+)
  - **MFHD-Mixed** phase
  - Fall 2011
  - General refinements rather than radical changes (e.g. interface tweaks, routing list support)

Year in Review

- Stats after one year of full production use
  - MFHD mix ratio
    - Merged display - 1232 records
    - MFHD-Only display - 113 records
    - MFHD-Plus display - 2 records
  - Structure counts
    - Subscriptions - 1341
    - Distributions - 1386
    - Issuances - 13666
    - Received Items - 9438

Year in Review (cont.)

- General improvements
  - Comma-separation of summaries no longer hard-coded
  - Merging of holdings will now honor an open-ended holding
  - Several internal processing fixes
  - Efficiency

Year in Review (cont.)

- Improvements to MFHD prediction engine
  - Calendar changes trump unit counts
    - Example
      - Weekly which has "26" issues per volume
      - Volumes starting in Jan. and Jul.
      - Sometimes have **25** issues per volume
    - Issue count is now informational (i.e. "generally 26") for these patterns, not authoritative

Year in Review (cont.)

- Improvements to MFHD prediction engine (cont.)
  - Honor issue restarts at calendar changes
    - Deals with incrementing the volume vs. resetting issue to '1'
    - Example: '**$u** var **$v** r' … $x 0101,0701
  - Winter starts the year
    - Winter 2011 followed by Spring 2011? Or is it Spring 2012?
    - MFHD grey area which we are making meaningful for this case (**$w** 4 **$y** ps24,21,22,23)

Year in Review (cont.)

- Improvements to MFHD prediction engine (cont.)
  - Basic support for unit counts with non-restarting volumes
    - Example
      - **$a** v. **$b** no. **$u** 4 **$v** c
      - v.24 no.96 … v.25 no.97
    - Basic because, without context, numbering must be consistent from beginning of run
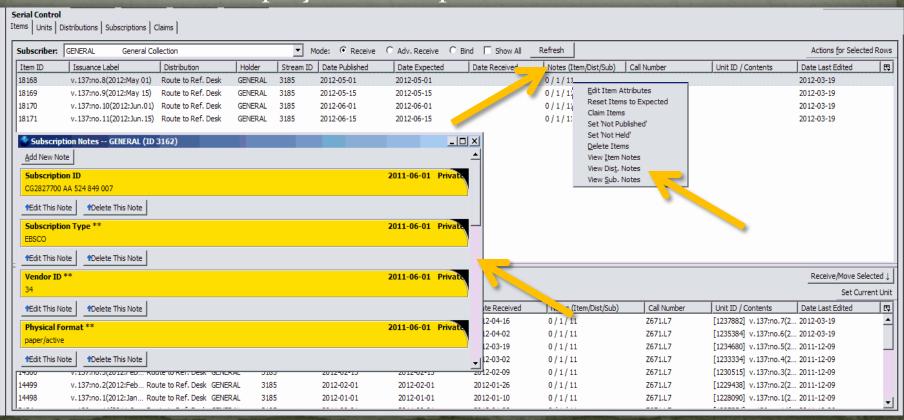
Looking Forward

Near Future

- Interface integration and refinement
  - Started calling Dojo forms (Alternate Control style) in Serial Control interface (for 2.2, see the Issuance editor)
    - Reduces duplication of effort
    - Eases transition
  - Improved holdings display in TPAC
    - More accurate, usable
    - Small step toward integration, uses stored summaries instead of on-the-fly computation

Near Future (cont.)

- Improved note support in Serial Control
  - Now editable!
  - Items tab displays counts, provides access to all three levels

Slightly Less Near Future

- Redesign of holdings statement computation
  - Current system of strict pattern detection only works for short runs and perfect worlds
  - Sometimes displays imaginary gaps or (worse) imaginary issues

Slightly Less Near Future

- More complete update triggers for holdings summaries
  - Current triggers -- receive an item, reset an item to expected
  - Known needed triggers -- delete an item, edit attached MFHD record
- Claims
  - Temporary custom solution
    - In Items tab, right-click, select "Claim this item"
      - Changes item status
      - Row changes color
    - Web page (Perl script) showing "Serials needing to be claimed"
  - Something at least as good will be in 2.NEXT
  - Non-functional "Claims" tab will be removed in 2.2

Serials Needing to be Claimed:

Location	Title	Label	Date Expected	Record ID
Recent Periodicals	Education week	v.31:no.25(2012:Mar.21)	2012-03-20	146270
Recent Periodicals	Modern Austrian literature	v.45:no.1(2012:[Mar.])	2012-03-23	547340
Recent Periodicals	The Journal of symbolic logic	v.77:no.1(2012:Mar.)	2012-03-20	159720
Recent	The North American	v.297:no.2(2012:Spring)	2012-03-20	358287

Serial Control

Items | Units | Distributions | Subscriptions | Claims

Subscriber: GENERAL   General Collection   ▼   Mode: ⦿ Receive ○ Adv. Receive ○ Bind ☐ Show All   Refresh

Item ID	Issuance Label	Distribution	Holder	Stream ID	Date Published	Date Expected	Date Received	Notes (Item/Dist)
13929	v.46:no.2(2012:Feb.)	MRC-CYO	MRC	2678	2012-02-01	2012-02-01		0 / 0 / 7
13932	v.46:no.3(2012:Mar.)	Reading Area	GENERAL	2679	2012-03-01	2012-03-01		0 / 1 / 7
13934	v.46:no.4(2012:Apr.)	Reading Area	GENERAL	2679	2012-04-01	2012-04-01		0 / 1 / 7
13935	v.46:no.5(2012:May)	MRC-CYO	MRC	2678	2012-05-01	2012-05-01		
13936	v.46:no.5(2012:May)	Reading Area	GENERAL	2679	2012-05-01	2012-05-01		
13937	v.46:no.6(2012:Jun.)	MRC-CYO	MRC	2678	2012-06-01	2012-06-01		
13938	v.46:no.6(2012:Jun.)	Reading Area	GENERAL	2679	2012-06-01	2012-06-01		
13939	v.46:no.7(2012:Jul.)	MRC-CYO	MRC	2678	2012-07-01	2012-07-01		
13940	v.46:no.7(2012:Jul.)	Reading Area	GENERAL	2679	2012-07-01	2012-07-01		
13941	v.46:no.8(2012:Aug.)	MRC-CYO	MRC	2678	2012-08-01	2012-08-01		
13942	v.46:no.8(2012:Aug.)	Reading Area	GENERAL	2679	2012-08-01	2012-08-01		
13943	v.46:no.9(2012:Sep.)	MRC-CYO	MRC	2678	2012-09-01	2012-09-01		0 / 0 / 7

Edit Item Attributes
Reset Items to Expected
Claim Items
Set 'Not Published'
Set 'Not Held'
Delete Items
View Item Notes
View Dist. Notes
View Sub. Notes

Broader Vision

- Dawn, Discovery, Development…
- Discernment: Serials module in Evergreen 2.NEXT
  - **MFHD-Or(-Not)** phase
  - D-word runner up: Deduplication!

Broader Vision (cont.)

- Focus Transition
  - Last year - "It's all about the holdings"
    - Flexibility trumped usability
    - Efforts focused on understanding and supporting established fundamentals

Broader Vision (cont.)

- Focus Transition (cont.)
  - This year - "It's all about the interface"
    - What features are popular? Make them prominent
    - What features are unused? Hide them or remove them
    - What features overlap? Combine them or rethink them

Broader Vision (cont.)

- Focus Transition (cont.)
  - Put another way
    - Initial focus was on starting - establishing a foundation and transition
    - New focus will be on finishing - using the knowledge we have gained

Broader Vision (cont.)

- Things We Know
  - Interfaces need to be reconciled and merged
  - Ties to acquisitions are still missing
  - Increasing quantities are stressing the interfaces
    - Encourages the desire to "clean up"
    - Requires better pagination, filtering, clearer data relationships and interface guard rails

Call To Action

- Writing software for imaginary people with imaginary problems is hard
- First way to help - Show us your data
  - MFHD records
  - Table dumps
- Second way to help - Communicate
  - If you think you found a bug, you probably did!
  - Wishlist bugs are bugs, too
  - Share your thoughts on the mailing list

Call To Action (cont.)

- "People put quotes in their presentations to make themselves look smart"

-Jono Bacon

Links

- Bug reports (Launchpad): https://bugs.launchpad.net/evergreen/
- Mailing List: http://evergreen-ils.org/listserv.php
- Contact Information
  - Dan Wells – dbw2@calvin.edu
  - Remington Steed – rjs7@calvin.edu
  - Lebbeous Fogle-Weekley – lebbeous@esilibrary.com