Evergreen Serials: Looking Back, Looking Forward

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

<table>
<thead>
<tr>
<th>ISSUE LABEL</th>
<th>CALL NUMBER</th>
<th>BARCODE</th>
<th>SHELVING LOCATION</th>
<th>HOLDABLE?</th>
<th>STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>(2011 Jan.)</td>
<td>SCI AM</td>
<td>5635673467347</td>
<td>Metal Bin</td>
<td>Place on issue</td>
<td>In process</td>
</tr>
<tr>
<td>(2011 Feb.)</td>
<td>SCI AM</td>
<td>46525462554564</td>
<td>Metal Bin</td>
<td>Place on issue</td>
<td>In process</td>
</tr>
</tbody>
</table>
Looking Forward

Near Future (cont.)

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

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
Looking Forward

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

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

Broader Vision (cont.)

• Focus Transition
  • Last year - “It’s all about the holdings”
    • Flexibility trumped usability
    • Efforts focused on understanding and supporting established fundamentals
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
Looking Forward

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
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
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
“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