

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:

The screenshot displays a library catalog interface with a record summary and a MARC record window. A yellow arrow points to the search bar, and two yellow arrows point to the 'Edit Holdings' and 'Add MFHD Record' buttons.

Record Summary:

Title	Sociological for...
Author	North Central Sociological Asso
Edition	
Publication Info.	[Kalamazoo, Mich., etc., North Ce
Physical Description	v. illus. 21 cm.
Format	text
Abstract	
Subjects	Sociology -- Periodicals.
Preceding Entry	Ohio valley sociologist.
ISSN	0038-0237

MARC Record:

Options: Stack subfields Flat-Text Editor

Fixed Fields -- Record type: MFHD

Type	y	ELvl	4	Item						
LDR										
001										
004										
005										
007										
008										
022										
035										
035										
852										
853	2	0								
863	4	0								
901										

Holdings summary (3RD-FLOOR -- HM1 .S675 -- Not currently received) [Entry #1]

Volumes: v.1:no.1(1967:Autumn) - v.44:no.4(2011:Nov.)

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:

Record Summary ([View MARC](#))

Title: Library journal **Edition:** **TCN:** o02351916 **Created By:** admin
Author: **Pub Date:** 1976 **Record ID:** 526195 **Last Edited By:** admin
Bib Call #: Z671.L7 **Record Owner:** **Last Edited On:** 12/12/09 10:15 PM

Record 8 of 1000 [Actions for this Record](#)

Serial Control

Items Units Distributions Subscriptions **Current**

Subscriber: GENERAL General Collection Mode: Receive Adv. Receive Bind Show All [Actions for Selected Rows](#)

Item ID	Issuance Label	Distribution	Holder	Stream ID	Date Published	Date Expected	Date Received	Notes (Item/Dist/Sub)	Call Number	Unit ID / Contents	Date Last Edited	
18168	v.137:no.8(201...	Route to Re...	GENER...	3185	2012-05-01	2012-05-01		0 / 1 / 11			2012-03-19	
18169	v.137:no.9(201...	Route to Re...	GENER...	3185	2012-05-15	2012-05-15		0 / 1 / 11			2012-03-19	
18170	v.137:no.10(20...	Route to Re...	GENER...	3185	2012-06-01	2012-06-01		0 / 1 / 11			2012-03-19	
18171	v.137:no.11(20...	Route to Re...	GENER...	3185	2012-06-15	2012-06-15		0 / 1 / 11			2012-03-19	

Showing: Recently Received [Set Current Unit](#)

Current Working Unit: **Auto per Item**

Item ID	Issuance Label	Distribution	Holder	Stream ID	Date Published	Date Expected	Date Received	Notes (Item/Dist/Sub)	Call Number	Unit ID / Contents	Date Last Edited	
18167	v.137:no.7(201...	Route to Re...	GENER...	3185	2012-04-15	2012-04-15	2012-04-16	0 / 1 / 11	Z671.L7	[1237882] v.137:n...	2012-03-19	
18166	v.137:no.6(201...	Route to Re...	GENER...	3185	2012-04-01	2012-04-01	2012-04-02	0 / 1 / 11	Z671.L7	[1235384] v.137:n...	2012-03-19	
14502	v.137:no.5(201...	Route to Re...	GENER...	3185	2012-03-15	2012-03-15	2012-03-19	0 / 1 / 11	Z671.L7	[1234680] v.137:n...	2011-12-09	
14501	v.137:no.4(201...	Route to Re...	GENER...	3185	2012-03-01	2012-03-01	2012-03-02	0 / 1 / 11	Z671.L7	[1233334] v.137:n...	2011-12-09	

Looking Back: An Overview (cont.)

- MFHD-Plus Interface example 2:

The screenshot displays the MFHD-Plus interface for a subscription. At the top, there are navigation buttons: "Go Back", "Reload", and "Go Forward". The main section is titled "Subscription Details" and includes tabs for "Summary", "Distributions", "Captions and Patterns", and "Issuances". A yellow arrow points to the "Issuances" tab. To the right, there is a "Batch Item Receive" button, also indicated by a yellow arrow. Below the tabs, there are buttons for "Refresh Grid", "New Issuance", "Delete Selected", and "Generate Predictions". The main content area contains a table of issuances with columns for "Label", "Date Published", "Caption/Pattern", "Holding Type", and "Holding Code". The table lists 18 rows of data, starting with a "Starter" row and followed by 17 numbered rows. Each row has a checkbox in the first column. At the bottom left, there are "Back" and "Next" links.

Go Back Reload Go Forward Debug

Subscription Details

Summary Distributions Captions and Patterns Issuances

Batch Item Receive

Refresh Grid New Issuance Delete Selected

Generate Predictions

[Back](#) [Next](#)

✓	Label	Date Published	Caption/Pattern	Holding Type	Holding Code
<input type="checkbox"/>	Starter	4/15/11 12:00 AM	3162	basic	["4","1","8","1.1","a","136","b","7"
<input type="checkbox"/>	v.136.no.8(2011:May.01)	5/1/11 12:00 AM	3162	basic	["4","1","8","1.2","a","136","b","8,"
<input type="checkbox"/>	v.136.no.9(2011:May.15)	5/15/11 12:00 AM	3162	basic	["4","1","8","1.3","a","136","b","9,"
<input type="checkbox"/>	v.136.no.10(2011:Jun.01)	6/1/11 12:00 AM	3162	basic	["4","1","8","1.4","a","136","b","10"
<input type="checkbox"/>	v.136.no.11(2011:Jun.15)	6/15/11 12:00 AM	3162	basic	["4","1","8","1.2","a","136","b","11"
<input type="checkbox"/>	v.136.no.12(2011:Jul.01)	7/1/11 12:00 AM	3162	basic	["4","1","8","1.3","a","136","b","12"
<input type="checkbox"/>	v.136.no.13(2011:Aug.01)	8/1/11 12:00 AM	3162	basic	["4","1","8","1.4","a","136","b","13"
<input type="checkbox"/>	v.136.no.14(2011:Sep.01)	9/1/11 12:00 AM	3162	basic	["4","1","8","1.5","a","136","b","14"
<input type="checkbox"/>	v.136.no.15(2011:Sep.15)	9/15/11 12:00 AM	3162	basic	["4","1","8","1.6","a","136","b","15"
<input type="checkbox"/>	v.136.no.16(2011:Oct.01)	10/1/11 12:00 AM	3162	basic	["4","1","8","1.7","a","136","b","16"
<input type="checkbox"/>	v.136.no.17(2011:Oct.15)	10/15/11 12:00 AM	3162	basic	["4","1","8","1.2","a","136","b","17"
<input type="checkbox"/>	v.136.no.18(2011:Nov.01)	11/1/11 12:00 AM	3162	basic	["4","1","8","1.3","a","136","b","18"

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

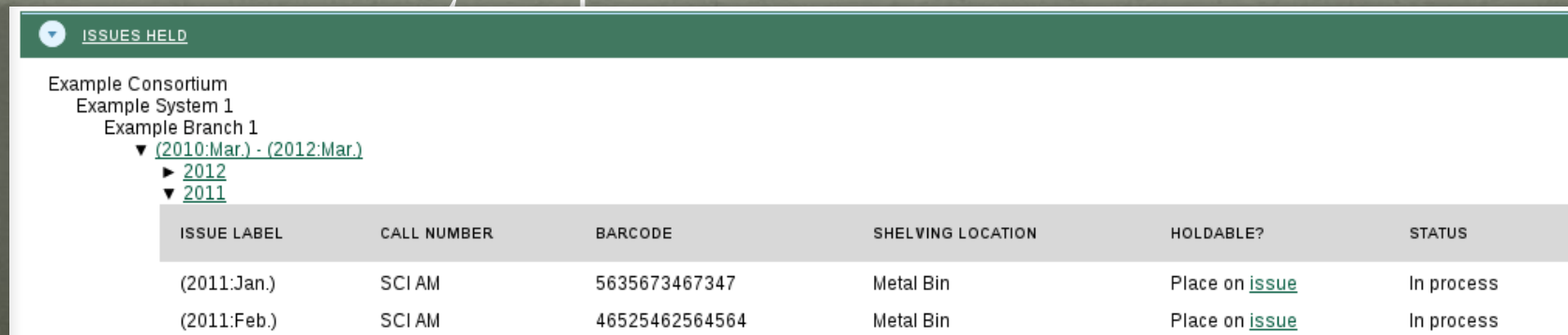
Looking Forward



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



The screenshot shows a library system interface. At the top, there is a green header bar with a circular icon and the text "ISSUES HELD". Below this, a tree view displays the hierarchy: "Example Consortium", "Example System 1", "Example Branch 1", and a collapsed node "(2010:Mar.) - (2012:Mar.)". Under the collapsed node, there are links for "2012" and "2011". Below the tree view is a table with six columns: "ISSUE LABEL", "CALL NUMBER", "BARCODE", "SHELVING LOCATION", "HOLDABLE?", and "STATUS". The table contains two rows of data.

ISSUE LABEL	CALL NUMBER	BARCODE	SHELVING LOCATION	HOLDABLE?	STATUS
(2011:Jan.)	SCI AM	5635673467347	Metal Bin	Place on issue	In process
(2011:Feb.)	SCI AM	46525462564564	Metal Bin	Place on issue	In process

Looking Forward

Near Future (cont.)

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

The screenshot displays the 'Serial Control' application interface. At the top, there are navigation tabs: 'Items', 'Units', 'Distributions', 'Subscriptions', and 'Claims'. Below these, a header section includes 'Subscriber: GENERAL', 'General Collection', 'Mode: Receive', and a 'Refresh' button. The main area is a table with columns: 'Item ID', 'Issuance Label', 'Distribution', 'Holder', 'Stream ID', 'Date Published', 'Date Expected', 'Date Received', 'Notes (Item/Dist/Sub)', 'Call Number', 'Unit ID / Contents', and 'Date Last Edited'. A context menu is open over the 'Notes' column, listing actions like 'Edit Item Attributes', 'Reset Items to Expected', 'Claim Items', 'Set 'Not Published'', 'Set 'Not Held'', 'Delete Items', 'View Item Notes', 'View Dist. Notes', and 'View Sub. Notes'. A separate window titled 'Subscription Notes -- GENERAL (ID 3162)' is overlaid on the bottom left, showing fields for 'Subscription ID', 'Subscription Type', 'Vendor ID', and 'Physical Format', each with 'Edit' and 'Delete' buttons. A third table is visible at the bottom of the main window, showing a detailed view of item records with columns for 'Date Received', 'Notes (Item/Dist/Sub)', 'Call Number', 'Unit ID / Contents', and 'Date Last Edited'.

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

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

Looking Forward

Broader Vision

- Dawn, Discovery, Development...
- Discernment: Serials module in Evergreen 2.NEXT
 - 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

Looking Forward

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

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

Looking Forward

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