

KOHA

Serials

Presented by: CSIR-KNOWGATE


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KOHA: Serials

- ▶ Add a Subscription
 - ▶ Receive Issues
 - ▶ Create a Routing List
 - ▶ Subscription in Staff Client
 - ▶ Subscription in OPAC
 - ▶ Claim Late Serials
 - ▶ Searching Serials
 - ▶ Check Serial Expiration
 - ▶ Renewing Serials
- 

KOHA: Serials

- ▶ The Serials module in Koha is used for keeping track of journals, newspapers and other items that come on a regular schedule
- ▶ As with all modules, make sure you go through the related Implementation Checklist before using the Serials module
 - [More > Serials](#)

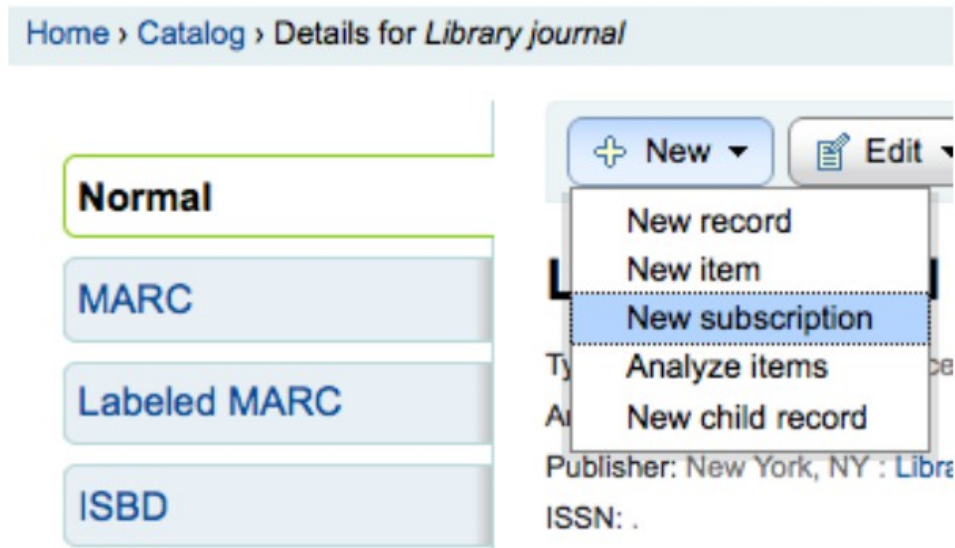
KOHA: Serials

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KOHA: Serials

- ▶ Subscriptions can be added by clicking the 'New' button on any bibliographic record



- ▶ Or by visiting the Serials module and clicking 'New Subscription'



KOHA: Serials

- ▶ New subscription from the Serials module you will be presented with a blank form

Add a new subscription

Subscription details

Vendor: () Search for a vendor

Biblio: 6158 (Library journal) *Required*
Search for Biblio | Create Biblio

create an item record when receiving this serial
 do not create an item record when receiving this serial

Library: None (select a library)

Location: None

Call number:

Grace period: day(s)

OPAC note:

Nonpublic note:

Patron notification: None
Select a notice and subscribers will be notified when new issues are received.

Number of issues to display to staff:

Number of issues to display in OPAC:

Serials planning

First issue publication date:

Frequency: -- please choose -- *Required*

Manual history:

Numbering pattern: -- please choose --

Subscription start date: *Required*

Subscription length: Number of months (enter amount in numerals) *Required*

Subscription end date:

Numbering formula:

Test prediction pattern Reset pattern Save subscription

Show/Hide advanced pattern

KOHA: Serials

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- ▶ **Receive Issues**

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KOHA: Serials

- ▶ Issues can be marked as received from several locations
- ▶ To find a subscription, use the search box at the top of the Serials page to search for the serial you'd like to receive issues for.

Search Subscriptions:

ISSN: Title:

[Search Subscriptions](#) [Check Out](#) [Search the Catalog](#)

[+](#) New Subscription

Serials subscriptions

Showing 1 to 7 of 7 Show entries Search:

ISSN	Title	Notes	Library (Callnumber)	Routing list		
1041-7915	Computers in libraries 2010.	Combined Issues Jan/Feb and Jul/Aug. (Combined Issues Jan/Feb and Jul/Aug.)	CPL (MAG)	Edit	Issue History	Serial receive
1041-7915	Computers in libraries 2010.	Combined Issues Jan/Feb and Jul/Aug. (Combined Issues Jan/Feb and Jul/Aug.)	CPL (MAG)	New	Issue History	Serial receive
1041-7915	Computers in libraries.	Combined issues in Jan/Feb and Jul/Aug.	FFL (MAG)	Edit	Issue History	Serial receive
1041-7915	Computers in libraries.			Edit	Issue History	Serial receive
1041-7915	Computers in libraries.	Combined issues in Jan/Feb and Jul/Aug.	FFL (MAG)	Edit	Issue History	Serial receive
1041-7915	Computers in libraries.	Combined issues	CPL	New	Issue History	Serial receive
1041-7915	Computers in libraries.	Combined issues in Jan/Feb and Jul/Aug. Library only keeps 2 years.	NIC (MAG)	New	Issue History	Serial receive
<input type="text" value="Search ISSN"/>	<input type="text" value="Search title"/>	<input type="text" value="Search notes"/>	<input type="text" value="Search library"/>			

Showing 1 to 7 of 7

KOHA: Serials

- ▶ From the search results you can click the '**Serial Receive**' link or you can click on the subscription title and then click the 'Receive' button
- ▶ The final way to receive serials is from the '**Serial Collection**' page. To the left of the Subscription summary page there is a menu with a link to 'Serial Collection'

Subscription for Library journal

Information Planning Issues Summary

Subscription ID: 10 Num to di
Librarian identity: nce Num to di
Vendor: Num to di

Home > Serials > Details for subscription #10

- [Serial collection](#)
- [Create routing list](#)
- [Claims](#)
- [Check expiration](#)

Subscription for Library journal

Information Planning Issues Summary

Subscription ID: 10
Librarian identity: nce
Vendor:
Biblio: [Library journal \(6158\)](#)
Library: CPL
Items: Serial receipt does not create record.
Grace period: 0

KOHA: Serials

- ▶ From the page that opens up you can click **'Edit Serial'** with the issue you want to receive checked

2012

Edit serials Generate Next

Date published	Date received	Number	Status	Notes	Library	Routing	Edit
06/15/2012	06/15/2012	Issue 6 : 2012	Expected		CPL	Print list	<input checked="" type="checkbox"/>

- ▶ All three of these options will open up the issue receive | **Serial edition *Library journal***

Numbered	Published on	Expected on	Status	Notes
Issue <input type="text" value="Issue 6 : 2012"/>	<input type="text" value="06/15/2012"/>	<input type="text" value="06/15/2012"/>	<input type="text" value="Expected"/>	<input type="text"/>
<small>Click to add item</small>				
Supplemental issue <input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>
<small>Click to add item</small>				
<input type="button" value="Save"/>				

- Expected
- Arrived**
- Late
- Missing
- Claimed
- Not available
- Delete

KOHA: Serials

- ▶ If you are receiving multiple issues at once, or have marked an issue as '**Late**' or '**Missing**' there you can click the '**Generate Next**' button below the list of issues

2012

Edit serials Generate Next

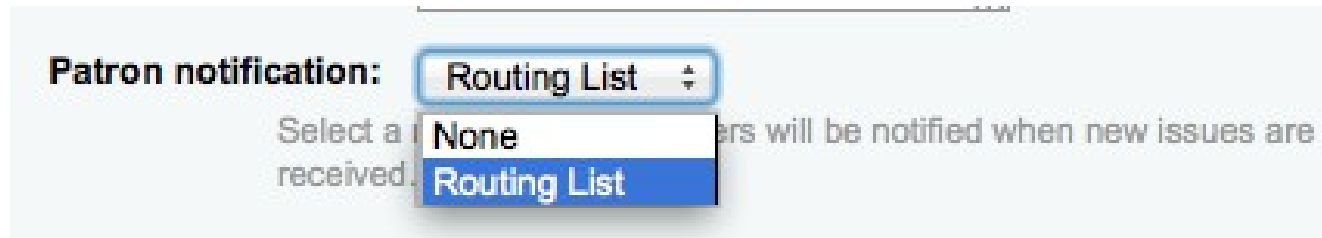
Date published	Date received	Number	Status	Notes	Library	Routing	Edit
06/15/2012	06/15/2012	Issue 6 : 2012	Expected		CPL	Print list	<input checked="" type="checkbox"/>

KOHA: Serials

- ▶ Add a Subscription
- ▶ Receive Issues
- ▶ **Create a Routing List**
- ▶ Subscription in Staff Client
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KOHA: Serials

- ▶ A routing list is a list of people who receive the serial before it goes to the shelf
- ▶ When setting up your serial subscription you want to be sure to pick **'Routing List'** from the **'Patron Notification'** pull down



- ▶ When on the subscription page you will see a link to the left that reads **'Create Routing List'** or **'Edit Routing List'**

Home › Serials › Details for subscription #10

- Serial collection
- **Edit routing list**
- Claims
- Check expiration

+ New subscription

📄 Edit ▾

🔄 Renew

Subscription for Library journal

Information

Planning

Issues

Summary

Subscription ID: 10

KOHA: Serials

- ▶ Clicking that link will bring you to the menu to add a new routing list

Edit routing list for *Library journal*

Issue:

Recipients: [Add recipients](#)

Notes:

- ▶ Click 'Add recipients' in order to add people to the routing list

Filter :

Name:

Library:

Category:

Results 1 to 5 of 5 found for 'engard'

Card	Name	Library	Add
9876543456	Engard, Beau	FFL	Add
9876543453	Engard, Brian	NIC	Add
9876543452	Engard, Coda	FFL	Add
9876543457	Engard, Nicole	NIC	Add
23529001223643	Engard, Unnamed Puppy	NIC	Add

[Close](#)

KOHA: Serials

- ▶ Clicking 'Add' to the right of each name will add them to the routing list
- ▶ When you have chosen all of the people for the list, click the 'Close' link to be redirected to the routing list

Edit routing list for *Library journal*

Issue: Issue 6 : 2012 (06/14/2012) ▾

Recipients:

Name	Rank	Delete
Brian Engard	1 ▾	Delete
Coda Engard	2 ▾	Delete
Nicole Engard	3 ▾	Delete

[Add recipients](#) [Delete all](#)

Notes:

KOHA: Serials

- ▶ If the list looks the way you expect it to, then click '**Save**'
- ▶ Next you will be brought to a preview of the routing list

Preview routing list for *Library journal*

Issue: Issue 6 : 2012 (06/14/2012)

List member:

Name
Engard, Brian
Engard, Coda
Engard, Nicole

Notes:

Save and preview routing slip Edit Delete

KOHA: Serials

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KOHA: Serials

- ▶ Subscription information will appear on bibliographic records under the 'Subscriptions' tab

[+ New](#) [Edit](#) [Save](#) [Add to List](#) [Print](#) [Place Hold](#) [z39.50 Search](#)

Computers in libraries.

- **Published by:** [Meckler](#), (Westport, CT :)
- **Description:** v. : ill. ; 28 cm.
- **OPAC View:** [Open in new window](#)

• **ISSN:**1041-7915

• **Subjects:**

- [Libraries -- Automation -- Periodicals.](#)
- [Library science -- Computer programs -- Periodicals.](#)
- [Minicomputers -- Periodicals.](#)
- [Information technology -- Periodicals.](#)
- [Information Systems -- Periodicals.](#)
- [Libraries -- Periodicals.](#)
- [Computers.](#)
- [Bibliotheken.](#)
- [Micro-ordinateurs -- Périodiques.](#)
- [Bibliothèques -- Automatisation -- Périodiques.](#)
- [COMPUTER APPLICATIONS.](#)
- [LIBRARY AUTOMATION.](#)
- [LIBRARIES.](#)
- [MICROCOMPUTERS.](#)
- [Automatisation](#)
- [Bibliothèque](#)
- [Micro-ordinateur](#)

• **Copyright:** 1988

[Holdings](#) [Descriptions](#) [Subscriptions](#)

This is a serial subscription

(There are 1 subscriptions associated with this title).

At library: Fairview

Combined issues in November & July.

The 3 latest issues related to this subscription:

Issue #	Date	Status	Note
Vol 28, No 7	07/15/2008	Arrived	
Vol 28, No 6	06/15/2008	Arrived	
Vol 28, No 5	05/15/2008	Arrived	

[Subscription Details](#)

KOHA: Serials

- ▶ Clicking the 'Subscription Details' link will take you to the Subscription summary page in the staff client

Subscription for Computers in libraries 2010.

Information

Planning

Issues

Summary

Subscription ID:	2
Librarian identity:	nce
Vendor:	
Biblio:	Computers in libraries 2010. (4117)
Library:	CPL
Items:	Serial receipt creates an item record.
Grace period:	0

Call Number:	MAG
Number of issues to display to staff:	10
Number of issues to display to the public:	4
Routing:	yes

KOHA: Serials

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 - ▶ Renewing Serials

KOHA: Serials

- ▶ When viewing the subscription in the OPAC there will be several options
- ▶ Like in the staff client, there will be a Subscriptions tab on the bibliographic record

Computers in libraries.

[Normal View](#) [MARC View](#) [ISBD View](#)

Published by : [Meckler](#), (Westport, CT :)

Physical details: v. : ill. ; 28 cm.

ISSN:1041-7915

Subject(s): [Libraries --Automation --Periodicals](#), | [Library science --Computer programs --Periodicals](#), | [Minicomputers --Periodicals](#), | [Information technology --Periodicals](#), | [Information Systems --Periodicals](#), | [Libraries --Periodicals](#), | [Computers](#), | [Bibliotheken](#), | [Micro-ordinateurs --Périodiques](#), | [Bibliothèques --Automatisation --Périodiques](#), | [COMPUTER APPLICATIONS](#), | [LIBRARY AUTOMATION](#), | [LIBRARIES](#), | [MICROCOMPUTERS](#), | [Automatisation](#) | [Bibliothèque](#) | [Micro-ordinateur](#)

Year : 1988

Tags from this library:

No tags from this library for this title.

[Add](#)

Holdings (3)

Title Notes

Subscriptions

Comments

This is a serial

There are 1 subscription(s) associated with this title.

At library: Fairview

Combined issues in November & July.

Issues between: and: 01/15/2010

The 3 latest issues for this subscription:

Issue #	Date	Status	Note
Vol 28, No 7	07/15/2008	Arrived	
Vol 28, No 6	06/15/2008	Arrived	
Vol 28, No 5	05/15/2008	Arrived	

[More details](#)

KOHA: Serials

▶ There are two views:

- Compact : The compact serial subscription will show basic information regarding the subscription

Issues for a subscription

[Normal View](#) [Full History](#)

Subscription information for Computers in libraries.

The current subscription began on 01/15/2009 and is issued every month for 10 issues

The first subscription was started on

The subscription expired on 01/15/2010

Fairview Combined issues in November & July.

Available Issues

Vol 28, No 5; Vol 28, No 6; Vol 28, No 7

- Full: shows extensive details, broken out by year, regarding the subscription

Refine your search

Library :
(All) ▾

Subscription :
▾

Clear

Subscription information for Computers in libraries.

[Normal view](#) [Brief history](#) [Full history](#)

Show year: **2012** 2011

Date ▾	Library ▾	Notes ▾	Date received ▾	Number ▾	Status ▾	Subscription ▾
01/15/2012	FFL		02/23/2012	V. 32, N. 1	Arrived	1
01/15/2012	CPL		11/08/2011	Volume 36 / Number 1	Arrived	5
01/15/2012	NIC		11/27/2011	Volume 31, Number 1	Arrived	6

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KOHA: Serials

- ▶ Koha can send email messages to your serial vendors if you have late issues
- ▶ To the left of the main serials page there is a link to 'Claims'
- ▶ The links to claims also appears to the left of the subscription detail page

[Home](#) › [Serials](#)

- [Claims](#)
- [Check Expiration](#)

[Home](#) › [Serials](#) › Details for Subscript

- [Serial Collection](#)
- [Edit Routing List](#)
- [Claims](#)
- [Check Expiration](#)

KOHA: Serials

- ▶ If you don't have a claim notice defined yet you will see a warning message that you need to first define a notice

No claims notice defined. [Please define one.](#)

KOHA: Serials

- ▶ Clicking 'Claims' will open a report that will ask you to choose from your various serial vendors to generate claims for late issues

Claims

Supplier:

Missing Issues

Filters :

Status :

Title : Branch:

From To (MM/DD/YYYY)

<input type="checkbox"/>	Vendor	Branch	Title	Issue number	Status	Since	Claim Date	Begin Claim
<input type="checkbox"/>	Amazon	FFL	Computers in libraries.	V. 31, N. 2	Expected	03/15/2011		Export item data

[Export selected items data](#)

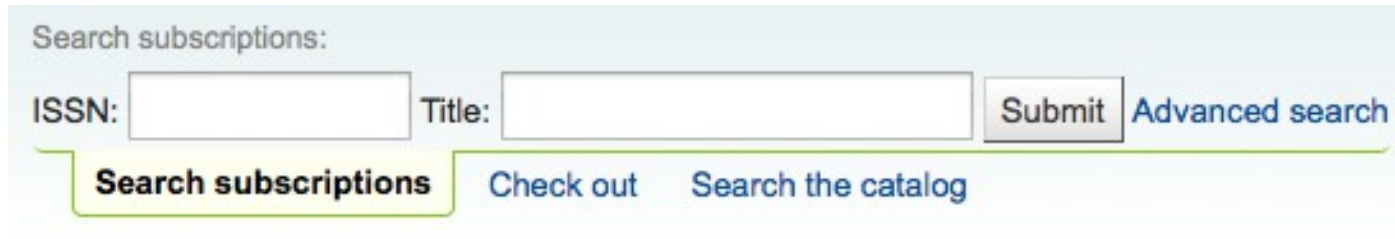
Select notice:

KOHA: Serials

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KOHA: Serials

- ▶ Once in the Serials module there is basic search box at the top that you can use to find subscriptions using any part of the ISSN and/or title

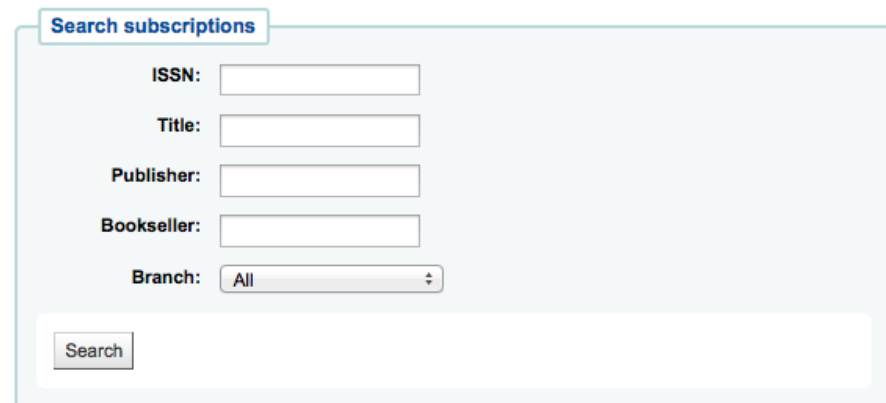


Search subscriptions:

ISSN: Title: [Advanced search](#)

- ▶ You can also click the 'Advanced Search' link to the right of the 'Submit' button to do a more thorough search of your serials

Serials subscriptions



Search subscriptions

ISSN:

Title:

Publisher:

Bookseller:

Branch:

KOHA: Serials

- ▶ From your results you can filter by using the search boxes at the bottom of each column and adjust the number of results using the toolbar at the top of the results set

ISSN	Title	Notes	Library	Call number	Expiration date		
1041-7915	Computers in libraries 2010.	(Combined Issues Jan/Feb and Jul/Aug.)		MAG	10/15/2015	Issue history	Serial receive
1041-7915	Computers in libraries.	Title from cover. Includes special editorial sections: Internet librarian; and: CD-ROM librarian, Latest issue consulted: Vol. 22, no. 7 (July/Aug. 2002).				Issue history	Serial receive
1041-7915	Computers in libraries 2010.	(Combined Issues Jan/Feb and Jul/Aug.)		MAG	10/15/2014	Issue history	Serial receive
1041-7915	Computers in libraries.	Title from cover. Includes special editorial sections: Internet librarian; and: CD-ROM librarian, Latest issue consulted: Vol. 22, no. 7 (July/Aug. 2002).		Journal	04/01/2020	Issue history	Serial receive

Search ISSN	Search title	Search notes	Search library	Search callnumber	Search expiration date		
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Showing 1 to 4 of 4 << First << Previous Next >> Last >>

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 - ▶ Renewing Serials

KOHA: Serials


- ▶ When adding serials you enter a subscription length, using the check expiration tool you can see when your subscriptions are about to expire
- ▶ To use the tool click the link to 'Check expiration' on the serials menu

Check expiration

Filter results :

Title:

ISSN:

Expiring before:  *Required*
(MM/DD/YYYY)

KOHA: Serials

- ▶ In the form that appears you need to enter at least a date to search by
- ▶ In your results you will see all subscriptions that will expire before the date you entered
- ▶ From there you can choose to view the subscription further or renew it in one click

Search

1 subscription(s) will expire before **01/01/2014**

ISSN	Title	Note	Expiration date	
1041-7915	Computers in libraries.	Combined issues in Jan/Feb and Jul/Aug.	01/01/2012	Edit Renew

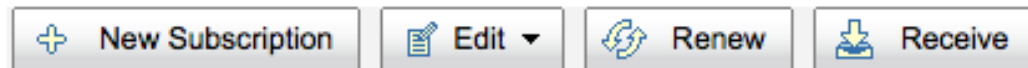
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▶ **Renewing Serials**

KOHA: Serials

- ▶ If your serial subscription has expired you won't be able to receive issues
- ▶ To renew your subscription you can click the '**Renew**' button at the top of your subscription detail page



Subscription for Computers in libraries 2010.

- ▶ Another option right of the subscription on the serial collection page

[Information](#) [Planning](#) [Issues](#) [Summary](#)

Serial Collection information for *Computers in libraries*. callnumber: MAG

Subscription Summary

Subscription Num.	Frequency	Numbering pattern	Library	Call number	Notes	Routing	Renew
#1	1/Month	Volume, Number	FFL	MAG	Combined issues in Jan/Feb and Jul/Aug.	Edit Routing List	Renew

KOHA: Serials

- ▶ Once you click the 'Renew' link or button you will be presenting with renewal options

Subscription renewal for Computers in libraries 2010.

Start date:

Subscription length:

Number of num:

Number of weeks:

Number of months:

Note for the librarian that will manage your renewal request:

Thanks

