

Future Developments: Serials, Reserves & Going Mobile

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2010 Timeline

- Version 1.6.1.0
 - Reserves Module
- Version 1.8 (Beta 2.0)
 - August 2010: KGLS
 - Acquisitions
 - OPAC and other updates
- Version 2.0
 - 4th quarter 2010
 - Serials
 - Additional Acquisitions
- Additional Mobile Features



Development Tracking

- Evergreen Wiki
 - http://open-ils.org/dokuwiki/doku.php?id=faqs:evergreen_roadmap
- Open Source for Public Libraries
 - <http://oss4pl.org/>
- RESCEL (Resource & Sharing Cooperative of Evergreen Libraries)
 - <http://www.rescel.org>

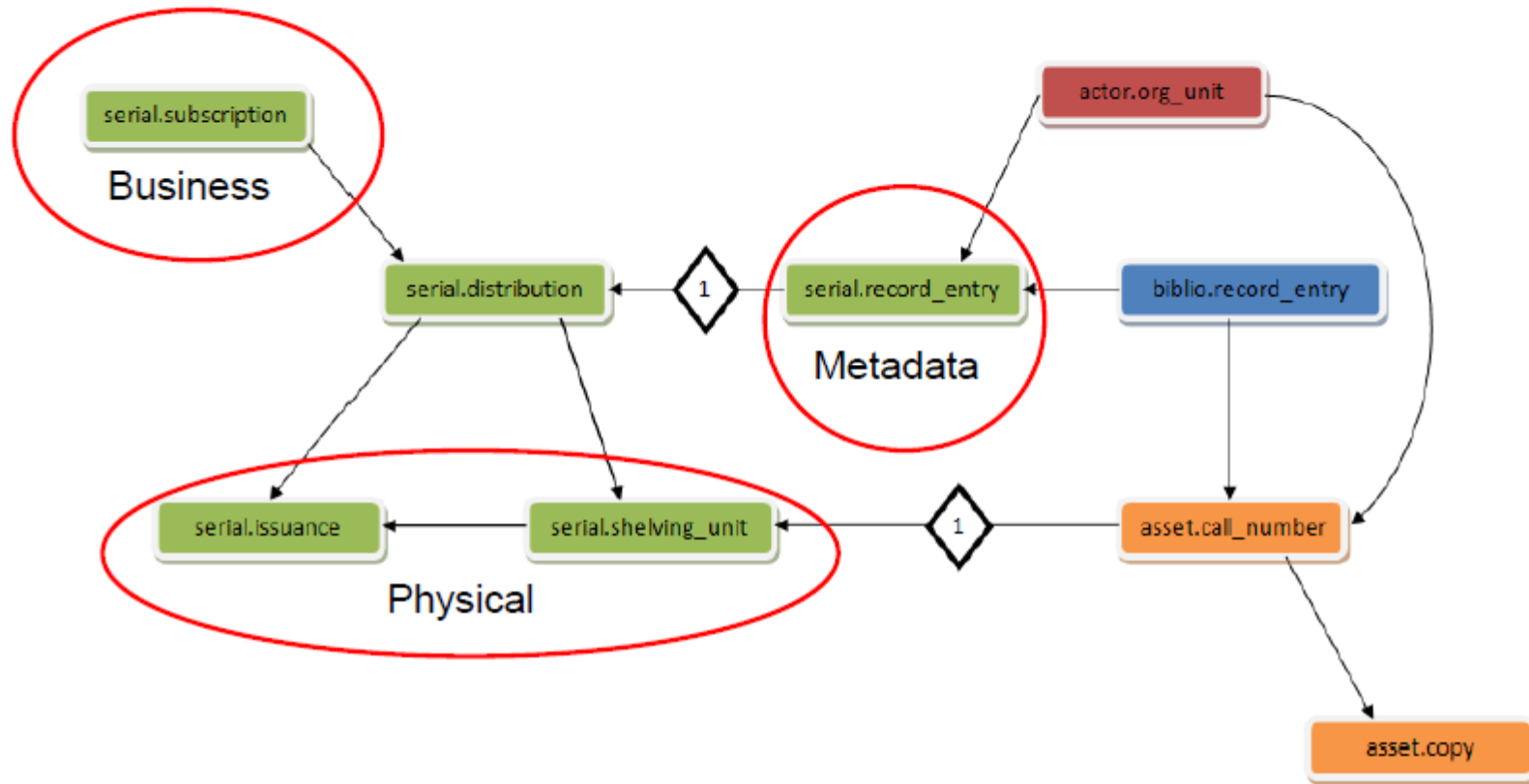


Reserves/Booking Module

- Developed by Mohawk College
 - Equipment
 - Material Reservations
 - Room Reservations
- Available in Version 1.6.1.0
- May 15, 2010



Serials



Serials: Background

- Why Do We Need Serials Management?
 - Manage a high volume of repetitive tasks
 - Fine-grained details of great importance



Serials: Background

- Challenges of Serials Management
 - Take advantage of general predictability and repeatability
 - Allow for very frequent exceptions
 - Accommodate wide variety of management practices
 - Manage **metadata level holdings, physical level copies, and business level information**



Serials: Two Approaches

- Conservative: simply use to check in and update holdings
 - Post collection work is the job of the cataloger
- Progressive: track serial from end-to-end (from prediction, arrival to discard)



Metadata – Basics of MFHD

- **MARC Format for Holdings Data**
 - Often pronounced as “muff-head”
 - Standard, often computable way to share volume, part, and copy information
 - Incorporates publication patterns as part of the standard



MFHD Example

853	1	2	#8 2 #a v. #b no. #u 4 #v r #i (year) #j (month) #w q
863	4	0	#8 2.1 #a 7-11 #i 1982-1986
863	4	0	#8 2.2 #a 12 #b 1-2 #i 1987
863	4	0	#8 2.3 #a 12 #b 3 #i 1987
863	4	0	#8 2.4 #a 13 #b 1-2 #i 1988

- Field 853
 - Caption and Pattern statement
 - Often one per record
- Field 863
 - Enumeration and Chronology statement
 - Often many per record
- Other paired fields – 854/864, 855/865
- Field 866 – Textual (i.e. non-standardized) Holdings

General Parameters

- Each serial “piece” will have its own entry
- Critical Information Includes
 - Date expected
 - Date received
 - Location information
 - Distribution information
 - Other: claiming status



Standard Workflow

- Create MFHD, including prediction pattern statement
- Generate the instances (creates the container)
- Receive the instances
 - Automatically generates/edits the chronological history in the catalog record and OPAC
 - Creates the call number and if required, copy statements



Serials Interface: Version 2.0

Record Summary
Title: The quarterly journal of experimental psychology :
Author: Experimental Psychology Society
TCN: (OCLC) [064268296](#) **Created By:** (HEKMAN) [101010101010101](#)
Edition: **Publication Date:** 2006-
Last Edited By: (HEKMAN) [101010101010101](#) **Last Edited On:** 12/07/09
[View MARC](#)

Record 9 of 629 [Start](#) [Previous](#) [Next](#) [End](#) [Actions for this Record](#)

Edit Serial Control
 Show Received [Refresh](#) [Actions for this Serial Control](#) [Actions for Selected Rows](#)

Date Created	Date Last Edited	Distribution	Issuance Label	Date Published	Date Expected	Date Received	Is Received?	Has Claims?	
2010-03-26	2010-03-26	2	Test iss				f	f	
2010-03-26	2010-03-26	2	Test iss				f	f	

Current Shelving Unit [Auto per Volume](#) [\(V.1\)](#) [Change Unit](#) [Receive/Move Selected](#)

Workflow Exceptions

- Types of problems
 - Claims
 - Prediction pattern exceptions (issue cancelled, extra issue, date changed, etc.)
 - Manual Shelving Unit, call number, and copy management
- Will be handled as needed by separate interfaces (acquisitions, cataloging, etc.)



Mobile Features

- Web Based
 - Take your library everywhere
- Email and Phone Notices
- Searches
- Availability



Future of Mobile

Slimpac <http://evergreen.lib.in.us/opac/en-US/extras/slimpac/start.html>

Currently execute a search and check availability

- Simple or advanced searches
- Local or Full consortium searches
- Available where



Future of Mobile

- Slimpac Will Include
 - My account features
 - Place, check status and cancel holds
 - Renew items
 - Use bookbags



Questions?

