Adding Local Serials for Duplication
For Gutenberg Libraries

# Process overview

KLAS supports Duplication of locally-produced Serial issues. To add a new Serial or Serial Issue for duplication, follow this process (more details on each step are below):

1. The **UID** of the recording **must match** the Serial KLAS ID and issue name. For example:
	* UID: us-nls-nv1a-SER\_SLN9-June\_2024
	* KLAS ID: SER-SLN9 Issue Name: June 2024

We recommend setting the filename of the zipped file containing the recording to match as well, so that it is easy to find files if needed in the future.

1. Upload the file to your Gutenberg’s “DBlocal” folder.
2. Create or Find the DB Serial record.
3. Add the Issue, **making sure that the issue name matches the UID**.
4. Wait overnight for the eDoc to populate, then Seed Serial.

Duplication Patrons can be subscribed to a Serial any time after the Serial record has been created, even if no eDocs have been created yet. Once the Serial has one or more issues with eDocs, the patrons that are subscribed to the Serial will begin receiving issues.

Circulation process:

* + When you Seed Serial, leftover reserves for old issues will be removed, and the new issue will be added to the patrons’ Request lists as Serial Reserves and pushed immediately to the top of the patrons’ Service Queues.
	+ Serial Issues on the Service Queue will then be eligible to be included in Duplication Orders, to be duplicated and mailed to the patron when they are eligible for service. This can occur overnight, or on your next weekly serials service day, depending on your settings.
	+ Depending on your settings, the serial Duplication Orders may be created at Paused status. When ready to duplicate them, use the Batch Manager to Enter Serials Run. Remember to Exit the Special Run when finished. See Gutenberg Batch Orders for more information.

# Step One – Serial Issue UID

## The UID

KLAS will automatically generate an eDoc linking the recording file to the Serial Issue record, but to do so, the **UID must match** according to its internal logic.

The UID is an internal identifier that is created in the .opf file when the recording is compiled in the Hindenburg software. In a text or code editor, it looks like:

<dc:Identifier id="uid" scheme="DTB"> **us-nls-kl1a-SER\_ABC9-JUNE\_2024**</dc:Identifier>

The UID can be **either:**

* us-**nls**-[libID]-[Serial KLAS ID]-[Issue Name] **or**
* us-**ntwk**-[libID]-[Serial KLAS ID]-[Issue Name]

## Spaces and Punctuation

For simplicity, it is best not to use spaces or dashes in your Issue names, but if you do, they must be replaced withunderscores for the UID.

KLAS can translate underscores into *either* dashes or spaces when encountered in a KLAS ID or Issue Name.

* ...JAN\_2024.zip matches an issue name of either “JAN 2024”or “JAN-2024".

However, it can’t translate underscores to both dashes *and* spaces in the same Issue Name.

* ...NOV\_DEC\_2024.zip does *not* match “NOV-DEC 2024”
* ...NOV\_DEC\_2024.zip *does* match “NOV-DEC-2024”or “NOV DEC 2024”

When setting the UID for new issues, make sure that you are consistent and follow the serial’s Caption Pattern.

Be very careful to stay on pattern. A human can tell that “2024\_07” and “2024\_7” are the same thing, but KLAS can’t!

## The Filename

For Gutenberg, the Filename of the recording and zipped folder are not checked and are not *required* to match. However, we *recommend* that you name the zipped folder to match the KLAS ID and issue name.

This will make it easy to find the file later if needed, as well as ensuring that it remains unique since it includes both the Serial ID and the Issue Name.

# Step Two – Upload the file

On your Gutenberg, there is a shortcut to a folder called “DBlocal.” (The full path is /DTBooks/Books/DBlocal/.) All local books and magazines should be placed in this folder.

If you need assistance or have questions about loading local files onto your Gutenberg, these are best directed to NLS.

# Step Three – Serial Record

The Serial Record in KLAS must be set up for the appropriate **Medium**, with a **Serial Type** of Cir / Circulating or Pub / Publication.

The same Serial record can circulate issues to *both* Physical Circulation and Duplication Service patrons—KLAS will be able to tell how the patrons should receive the Serial based on their Medium delivery type.

If there is no defined Spec Retention, KLAS will serve the serial starting with the oldest issue with an eDoc, no matter how many are added afterwards—all local serials should be given a retention limit, so that KLAS will start with more recent issues.

When setting the Caption Pattern, keep in mind the need to match your UID with the Issue Names following the conventions in Step One. For example, the pattern settings below will be consistent and easy to match when you name your files, and conform to the Serial ID-Issue Name format.



For more information about all of these considerations, please see the Serials Manual.

# Step Four – Add the Issue

If you are also adding physical copies of the Serial:

* + Use the Receive Issue function in the Serials Module to add the new issue.
	Make sure that the Issue Name matches the UID set in Step One.

If the Serial is duplication-only:

* + Go to the **Issues** tab (Alt-7) of the Serial Record. Use the Add Record button to create the new Issue. Make sure that the Issue Name matches the UID set in Step One.

After adding the Issue, refresh the record by selecting a different serial and then returning. The new Issue should be listed at the *bottom* of the Issues list. If not, check the selected chronology values, and contact Keystone Support if you need assistance.

# Step Five – Wait for the eDoc, then Seed Serial

KLAS automatically matches up files to records overnight; as part of this process, it will add an eDoc to the Serial Issue added in the previous step.

Once the eDoc is in place:

1. Open the Serial record to the **Subscribers** tab (Alt-5).
2. Use the Seed Serials function, and select the Yes option to delete existing Reserves.

This will clear any unfilled Reserves for previous issues, make sure all subscribers have the Reserve for the new issue, and push the new Reserve to the subscribers’ Service Queues.

Note any patrons referenced in the error message. The most common cause of errors is that the patron is missing a Service Queue for the Medium of the serial.

1. Review the **Requests** tab (Alt-6). You may need to switch to a different serial record and return to see the most recent information.

Unfilled Reserves can be left in place when a patron unsubscribes. If there are any remaining Reserves for old issues, select and Delete them here (Ctrl-d).

All Active subscribers should have a Reserve for the new issue, and the Reserves should be in SQ / Service Queue status.