KLAS®

Serials Manual

For Version 7 with Scribe Duplication

Keystone Systems, Inc.
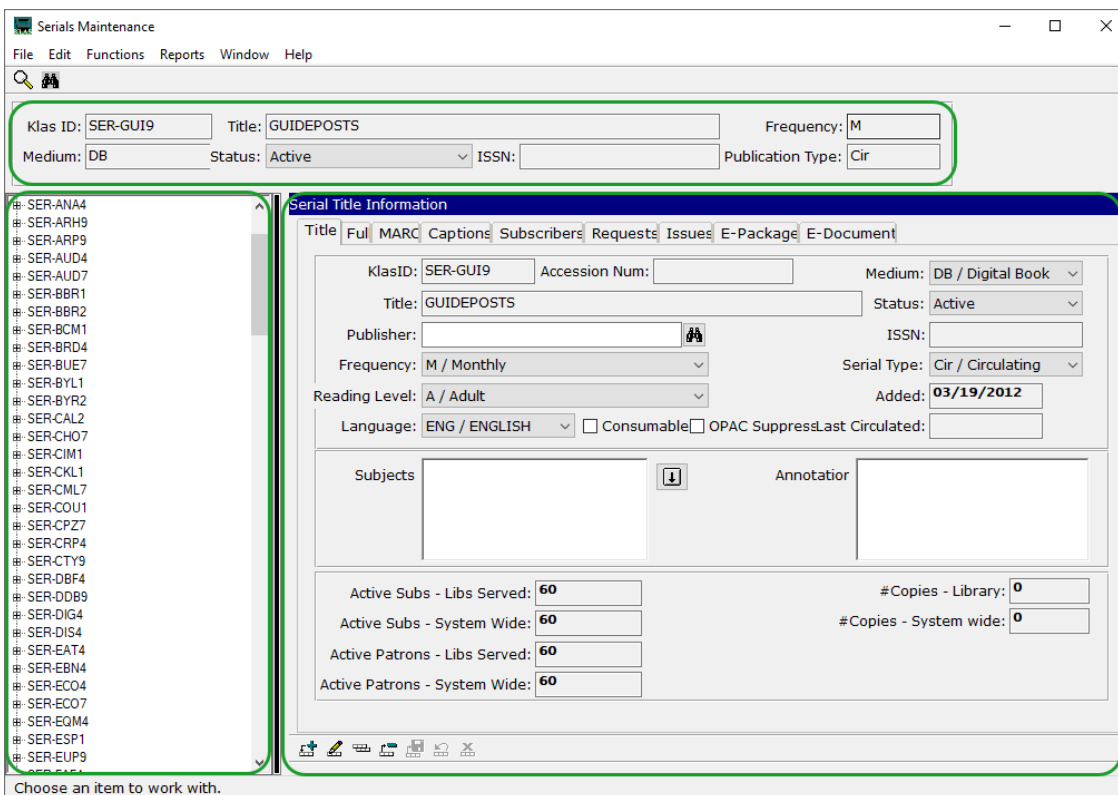
Contents

Navigating the Serials Module

The Serials Module includes a Header with key information about the currently selected Serial Record, a tree menu on the left of the screen, and the record itself on the right.

- If you know the Serial KLAS ID of the desired record, select it in the tree view.

- OR, use FIND 🔍 (CTRL-F) to open a record by Title, Item Barcode, or ISSN.

Holding and Inventory records

Use the PLUS SIGN to the left of the Serial KLAS ID in the tree view to access the Holding records for that serial (UCSC - MagShelf - 1 in the example below). For physical serials, the inventory records will be under the corresponding holding at level three (Copy View or Issue View).

Either Copy View or Issue View can be expanded using the PLUS SIGN to navigate physical inventory records by copy number or by issue name.

Note: No inventory records are generated for Duplication on Demand serials, but the Holding is used to apply Retention and other settings.

Navigation Tips

Unlike elsewhere in KLAS, Serial records cannot be refreshed using F5. If you need to reload a screen to view potential changes (such as checking for new Requests after using Seed Serial), select a different Serial record in the tree view, then return to the record in question.

To switch between the header / tree view and the current record using a keyboard, press F6.

Key Tabs Guide:

- **Title** (ALT-1) - Basic information about the serial as a whole. See page **12**.

- **Captions** (ALT-4) - New Issue Names are generated based on the Caption. See page **13**.

- **Subscribers** (ALT-5) - All patrons with a Subscription record for this Serial. Use the filter to view only Active subscribers. Seed Serial can be used here; see page **7**.

- **Requests** (ALT-6) - Serial Reserves can be reviewed here. To remove old Reserves and create new Reserves the Retained issues, use Seed Serial on the Subscribers tab.

- **Issues** (ALT-7) - A listing of all Issues for the serial, from oldest to newest. See page **4**.

- **E-Document** (ALT-9) - A listing of all files known to match this serial. See page **6**.

Serials-specific Functions:

- **Receive Issue** (Functions Menu) – Includes option to add holding. See pages **5**, **15**.

- **Seed Serial** (CTRL-Y) - Only available on the **Subscribers** tab, ALT-5. See page **7**.

- **Service Subscription** (CTRL-U) - Only available on the **Subscribers** tab, ALT-5. See page **7**.

Serials Circulation

Add a new Issue

For NLS serials (MoCs), the new Issue will be generated automatically when the new file is available. For local serials, however, each Issue must be added when you are ready for it to start circulating.

Add an Issue for duplication

1. Go to the **Issues tab** (ALT-7) of the Serial Record.

2. Use the ADD RECORD button to create the new Issue (CTRL-N).

3. Use the combo-boxes to select the appropriate chronology information. The issue name will be generated according to the information entered and the serial's Caption Pattern. For more information on Captions, see page **13**.

4. SAVE the new Issue. (CTRL-S)

   The new Issue will be listed on the Issues tab and subscribers that have already had the previous Issue will automatically receive a Serial Reserve for the new Issue.

   You will need to **UPLOAD A FILE FOR DUPLICATION** (see page **6**), and you may want to **SEED SERIAL** (see page **7**) to remove any unfilled Reserves for previous issues.

Receive a Physical Issue

1. Use the Functions menu to select Receive Issue.

2. On the Serials Receive screen, enter the **KLAS ID** of the serial, or use the Lookup button to find it. The Title for the current KLAS ID will be displayed.

3. Select the Holding, or use the Add Holding button to create one.

KLAS ID:	SER-NSL9
Title:	NEWSLETTER-ISL
Holding:	UCSC - MAGSHELF - 1

○ Received ● Not Yet Received

Issue: `<New Issue>` — Add Issue

Copy Number: 0   Barcode: ☐ Save On Enter

Save

Seq ▲	KLAS ID	Titl	Issue Name	Quantity	CopyNum	Barcode

4. If the Issue already exists and you are simply adding new copies, change the radio button to Received. Select the Issue from the drop-down.

   Otherwise, leave it on Not Yet Received, then use the Add Issue button.

   a. Select the appropriate chronology information in the combo-boxes. The issue name will be generated according to the information entered and the serial's Caption Pattern. See page **13** for more information.

   b. Save (Ctrl-s) the new Issue. The Issue record will be created, and Subscribers that have already had the previous Issue will automatically receive a Serial Reserve for the new Issue.

Type/Cap Num:	Basic / 1

YEAR: 2023
MONTH: 07

Issue Name:	07 2023	Add Date:	07/17/2024

   KLAS will return to the Receive screen with the new Issue selected.

5. For copy-specific serials: mark **Save on Enter** checkbox, then place your cursor in the **Barcode** field. Scan the barcode for each Copy.

   For non-copy-specific serials: enter the total number of Copies, then Save.

   The added copies will be displayed in the browse table at the bottom of the screen.

KLAS

Upload a file for Duplication

Serial Issue UID

KLAS will automatically generate an eDoc linking the recording file to the Serial Issue record, but to do so, **the UID must match the Serial and Issue** 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. The UID can be **either:**

- us-**nls**-[libID]-[serial_ID]-[KLAS ID] **or**
- us-**ntwk**-[libID]-[serial_ID]-[KLAS ID]

The UID cannot contain extra dashes or it won't be parsed correctly. The dash in the Serial ID must be replaced with an underscore.

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

- KLAS ID: **SER-SLN9**   Issue Name: **June 2020**
- UID: us-nls-nv1a-**SER_SLN9-June_2020**

When setting the UID for new issues, make sure that you are consistent and follow the serial's Caption Pattern. See page **13** for more information and recommendations.

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!

Serial Issue filename

For Gutenberg, the filename of the zipped folder is not checked and is not *required* to match the issue name. 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 you need to replace it with a corrected version or remove an outdated issue that you no longer want to circulate.

Upload the file to your Gutenberg

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.

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

Once the eDoc is in place, nightly will "push" the issue to subscribers with Service Queues. The Serial Reserve(s) will be placed at the top of the subscriber's queue, even if it is already full. This will make it the first title on the patron's next Duplication Order—however, note that the next order will not be created until the patron needs service, and it is possible for other titles to be added on top of the serial issue in the meantime.

Seed Serial

When a new Issue is added, KLAS automatically creates a Serial Reserve for all subscribers who have already received the previous issue. However, no Reserve is created for those who still have an outstanding Reserve for a previous issue.

With many serials, it is preferred to remove the previous Reserves and create a new Reserve for the current Retained Issue(s). For more information about which issue(s) will be Reserved, see **UNDERSTANDING RETENTION** on page **21**.

For NLS serials (MOCs), a Batch program runs as part of Nightly Processing to automatically run the Seed Serials program for all applicable serials. Most libraries have this process scheduled to run Weekly, on the same night that Serial Duplication Orders are generated.

For local serials:

1. Both options for this function are available on the Serial's **Subscribers tab** (ALT-5):

   - Update the Reserves for a **single subscriber** using SERVICE SUBSCRIPTION (CTRL-U).

   - Update the Reserves for **all Active subscribers** using SEED SERIAL (CTRL-Y).

2. A confirmation window will ask whether to remove current Reserves before creating new ones; select YES.

   All Reserves created by KLAS will be deleted, but *not* manually-added Reserves. Then, the new Reserves will be generated.

3. To refresh the record, select a different serial in the tree view, then come back to the current record and navigate to the **Requests tab** (ALT-6)

Note: In multi-branch library systems, Seed Serial will only run for patrons whose serials are served by the logged-in user's library.

Reserve a Specific Issue

If a patron wants to receive a specific Issue again, or requests a back-issue from before they subscribed to the serial, you can Reserve it for them from the Serial's **Requests tab** (ALT-6).

1. Use the ADD RECORD button (CTRL-N) to create the new request.

2. Enter the **Patron ID** or use the LOOK-UP button to find and select it. The patron's full name will be displayed.

3. Select the issue that the patron is requesting.

4. SAVE the request (CTRL-S).

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Unpause / Pause Serial Orders

Many libraries have KLAS set to Pause serial orders as they are created, allowing them to be processed as a separate batch. This will prevent them from syncing to the Gutenberg, but the orders will still count against the NSCutoff as appropriate.

Unpause and Sync for Duplication

1. Once all orders currently on the Gutenberg have finished duplicating and have been checked out, remove any remaining cartridges.

2. In KLAS, open the Batch Manager (View – Administrator – BATCH MANAGER).
   - If you are not usually the person to run this program, change the login name to the last person to unpause serials, then press the FILTER button.
   - Select anywhere in the history browse then press the END key to jump to the most recent programs.

3. Select a previous copy of the **Enter Serials Run** program, and use the COPY button (ALT-CTRL-S) to create a duplicate record.

4. Update the schedule to **Run Once – Immediately** using the SET SCHEDULE button.

5. SAVE the new run (CTRL-S). The program will un-pause all serials orders and sync them to the Gutenberg, while pausing the regular sync and all other order types.

6. Use the Gutenberg as normal; all orders available to duplicate will be serials.

Resume Regular Sync

Once all serial orders have been duplicated, run the **Exit Special Run** program in the batch manager. If you pause for other purposes as well, the same Exit program can be used for all Media and Patron Types.

1. Once all orders currently on the Gutenberg have finished duplicating and have been checked out, remove any remaining cartridges.

2. In KLAS, open the Batch Manager (View – Administrator – BATCH MANAGER).
   - If you are not usually the person to run this program, change the login name to the last person to unpause serials, then press the FILTER button.
   - Select anywhere in the history browse then press the END key to jump to the most recent programs.

3. Select a previous copy of the **Exit Special Run** program, and use the COPY button (ALT-CTRL-S) to create a duplicate record.

4. Update the schedule to **Run Once – Immediately** using the SET SCHEDULE button.

5. SAVE the new run (CTRL-S). The program will unpause any DB orders created in the meantime and resume the regular sync.

Print Physical Serial Mail Cards

For Duplicated serials, the Gutenberg will print the mail card at the time of duplication as usual.

For Physical serials:

1. In the Circulation Module, open the Mailing Cards function.
2. In Mailing Cards/Labels, set **Batch Type: Serial**.
3. Select the appropriate Stock Name and Current Printer.
4. Select PRINT. A new batch will be created and the cards will print to the selected printer.
5. POST the batch once the serials are in the mail.

Generate Email Distribution List

A serial can be used to track current, Active subscribers to an emailed Newsletter, but KLAS cannot send the emails. Rather than adding Issues in KLAS, use this record to generate a current email distribution list any time you need it.

When unsubscribing a patron from an emailed serial, the subscription should be Deleted instead of just cancelled; this ensures that your query will include only current subscribers.

1. When you ADD A NEW SERIAL for email distribution (see page **12**), we recommend:
    - **Medium:** Electronic
    - **Serial Type:** Pub / Publication (will not update the patron's Last Served date. If you do want the serial to update Last Served, use Cir / Circulating instead.)
    - **Consumable**

2. Use the **Issues tab** (ALT-7) to RECEIVE A PHYSICAL ISSUE (see page **5**). Receive enough copies for all Active subscribers; this count is available on the serial's **Title tab** (ALT-1).

3. Use the **Subscribers tab** (ALT-5) to

4. SEED Serial (see page **7**).

5. In the Patron Module, QUERY (CTRL-Q) for the active subscribers.

    Quick Search:
    - Main Status | Equals | A
    - Library ID | Equals | *[your library; only needed if you are serving only one branch in a multi-branch system]*

    Advanced Search (ALT-2):
    - Blocks | Is Blocked | Equals | no
    - Subscription | KLAS ID | Equals | *[the Serial ID, ex: SER-NEW7]*

6. BEGIN SEARCH.

7. On the Patron Query Results screen, EXPORT TO EXCEL (ALT-CTRL-X). Make sure the Maximum is set high enough to export all subscribers, and select VISIBLE FIELDS.

    Note: If Email is not included as a column in the Query Results browse table, contact Customer Support to add it.

8. Use the Email column from the Excel sheet to copy the email list into your mail program.

9. In the Circulation Module, open the Mailing Cards function.

10. In Mailing Cards/Labels, set **Batch Type: Serial**.
    - If you also circulate other Electronic or Physical serials, enter the KLAS ID in the From: and To: fields to limit the card batch to only this serial.
    - Mark **Print Preview**.

11. PRINT the batch, then POST. This informs KLAS that the issue was sent, adding the Issue and the Sent date to the patrons' Items tabs.

Troubleshooting Serials

If a Serial does not go out to subscribers when expected, you can follow these steps to help determine where it went off-track. If you need further assistance, please contact Keystone Customer Support.

Duplicated Serials

1. Is there an eDoc for the current issue? If not, confirm that the UID matches the Serial ID and File Name (see page **6**).

2. Do the subscribers have Serial Reserves? If not, try Seed Serial or Service Subscription--note any error messages, and check for any new Reserves (see page **7**).

3. Are the subscribing patrons set to get Duplication service in this medium? If not, you will need to add a Service Queue.

Physical Serials

1. Are there Items available for the current issue? If not, you may need to add inventory using the Receive function (see page **5**).

2. Are the subscribing patrons set to get Physical service in this medium? If you want Duplication patrons to get a Physical serial, you may need to use a separate Physical Braille medium (see page **16**).
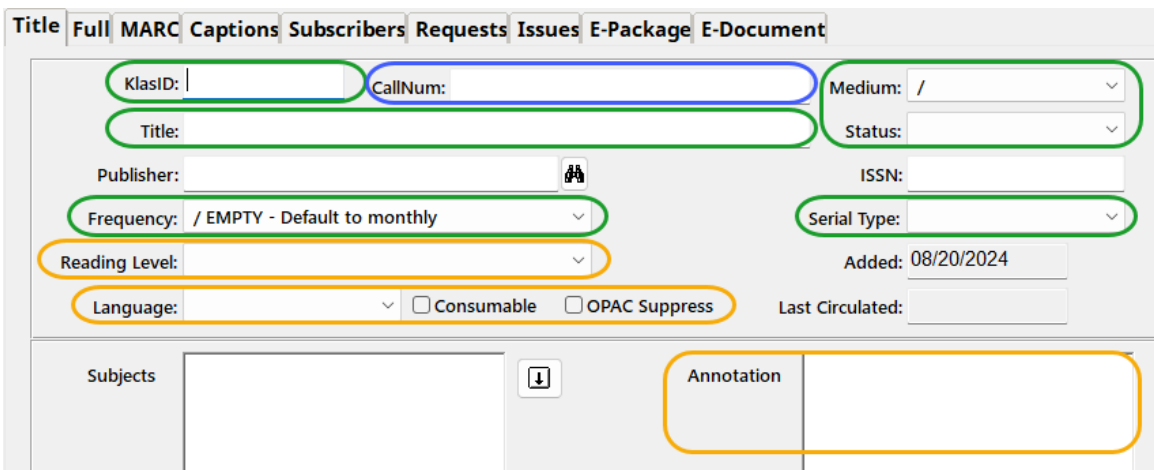
General

Issue Sorting: The issues on the Issues tab are automatically sorted from oldest to newest based on the data entered in the Chronology and Enumeration fields (see page **13**). If a new Issue is not at the bottom of the list, confirm the selected data for that issue and any sorting below it.

Note that for Seasonal serials, Winter sorts at the end of the year according to the MARC standard; if your Winter issue tends to come out in January or February, you may want to use Quarterly numbering instead of the seasons. We can set Quarter 1 to be labelled as "Winter" for Issue Naming if desired.

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Serials Maintenance

Add a new Serial

1. From the **Title tab** (Aʟᴛ-1) of any Serial Record, Aᴅᴅ a new record 🖫⁺ (Cᴛʀʟ-ɴ)

2. A blank Serial Record will open. Fill in the desired information about the new serial. These standard fields should be used for all serials:

   - **Serial KLAS ID** – Enter SER- (or your library's prefix for this serial type) followed by three letters plus a number. Browse the tree view to ensure that you are entering a unique ID. See Sᴇʀɪᴀʟ ID Nᴜᴍʙᴇʀɪɴɢ on page **21** for information on which number to use; most Digital Audio serials should use 4.
   - **Medium** - Many libraries use a dedicated Digital Serials medium (such as DS) to keep all Serials together in Serials-only orders; others may treat orders as DB / Digital Books to allow them to go out in the same orders as a patron's books.
   - **Title**
   - **Status**
   - **Frequency**
   - **Serial Type** – Generally Cir for "local <u>cir</u>culation." See Sᴇʀɪᴀʟ Tʏᴘᴇs on page **21**.

3. For NLS magazines (MoCs), the **Call Number** must be set to "DB" followed by the title of the serial, with dashes in place of spaces. For example: DBRolling-Stone

4. These additional fields may be used as needed or desired:

   - **Reading Level** and **Language** – All subscribers are served regardless of reading level or language, but they can be entered for reference and display on the WebOPAC.
   - **Consumable** – Mark this box for physically circulating serials that are not expected to be returned, such as paper newsletters.
   - **OPAC Suppress** – Mark this box if you *do not* want the new serial to be displayed on your WebOPAC (online catalog). **Note:** if *no* serials are displayed on your WebOPAC, this is not necessary.
   - **Annotation** – A brief description of the Serial; can display on the WebOPAC.

5. Once the desired information has been added, Sᴀᴠᴇ the new record. 🖫 (Cᴛʀʟ-s)

Add a Serial Caption

The Caption allows KLAS to create Issues for new NLS serials, and helps users generate consistent names for each Issue of local serials.

A serial can have multiple Captions; use the CapNum drop-down to select which caption to view. However, only one Basic caption can be Active at a time.

Captions for NLS serials (MoCs)

1. Select the Serial and go to the **Captions tab** (CTRL-4).

2. If switching to a new Basic caption, UPDATE (CTRL-O) the old caption to change it to **Active: no** and SAVE (CTRL-S) before adding the new one.

3. ADD a new caption (CTRL-N). Set the **Active** field to *yes* by typing "Y".

4. If the new caption is only needed for special cases, add it as **Type: Supplement**; otherwise, leave it as **Type: Basic**. Update the **Frequency** if needed.

5. Enter the desired Caption Pattern. The Pattern must be the serial's Call Number, followed by an underscore, then the appropriate number of Chron tokens for that serial's frequency.

    For example, a monthly serial would be: DBrolling-stone_@Chron1@-@Chron2@
    While a weekly serial would be: DBrolling-stone_@Chron1@-@Chron2@-@Chron3@

6. Define the Chron tokens. NLS always uses:

    Chron1: Year - 4-digit Year

    Chron2: Month - Numeric Month

    Chron3 (only if included in pattern): Day - Day

7. SAVE the Caption. (CTRL-S)

Captions for local serials

1. Select the Serial and go to the **Captions tab** (Ctrl-4).

2. If switching to a new Basic caption, Update (Ctrl-o) the old caption to change it to **Active: no** and Save (Ctrl-s) before adding the new one.

3. Add a new caption (Ctrl-n). Set the **Active** field to *yes* by typing "Y".

4. If the new caption is only needed for special cases, add it as **Type: Supplement**; otherwise, leave it as **Type: Basic**.

5. Enter the desired Caption Pattern. When setting the Caption Pattern and defining the tokens, keep in mind the need to match your filenames or UIDs with the Issue Names.

   We recommend making your pattern:

   - Short (For Example: using the three letters after the serial prefix in the KLAS ID, instead of the full serial title)
   - Unique both from issue to issue and from serial to serial ("nwl_@Chron1@_@Chron2@" instead of just "@Chron1@_@Chron2@")
   - Not contain any spaces or punctuation besides underscores ("Egad_@Chron1@_@Chron2@" not "Egad! @Chron1@-@Chron2@")
   - Consistent (For Example: always setting Chron2 to Month-Numeric, not sometimes Numeric and sometimes Short Month)
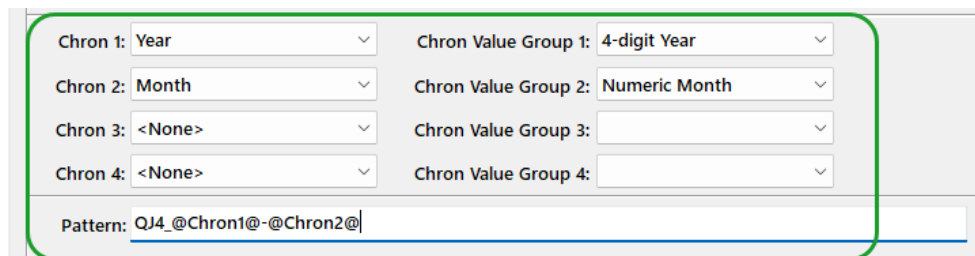
For more information on matching filenames to Issue Names for local serials, see

6. Make sure that all tokens in your pattern are completely defined using the fields in the middle of the Screen.

   - Chronology token: @chron#@ (each with a unique #)
   - Enumeration token: @enum#@ (each with a unique #)

   If your serial uses a numbering system that is not connected with the chronology of when that issue came out (for example: NLS Op Alerts use the year followed by the issue number, rather than a month or quarter, to allow the alerts to be issued as frequently or rarely as needed), you can use enumeration instead of or in addition to chronology.

7. Save the Caption. (Ctrl-s)

Add or Update Holding and Retention

If a serial is not set to Retained, KLAS will serve the serial starting with the oldest issue with an eDoc, no matter how many are added afterwards—we recommend giving all serials a retention, so that KLAS will start new subscribers with more recent issues.

Add a New Holding

1. If a serial does not yet have a Holding, right-click on its entry in the tree view to select ADD HOLDING.

   Alternatively, use the Receive function to add the holding:

   a. Use the Serials module Functions menu to select RECEIVE ISSUE.

   b. On the Serials Receive screen, enter the **KLAS ID** of the serial, or use the LOOKUP button to find it. The Title for the current KLAS ID will be displayed.

   c. Use the ADD HOLDING button; continue as below.

2. Set the appropriate Library Branch and Shelf ID.

3. Set the **General Retention** to Retained (if back-issues will be kept for use on request) or Not Retained (if back-issues will not be kept).

4. Set the **Specific Retention** to the number of issues that should be reserved for new or returning subscribers. For more information about the Retention settings, see

5. SAVE all changes. (CTRL-S)

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Change a Serial's Medium

Serials in the DB / Digital Books media format can be distributed to DB Duplication patrons along with their regular book service. However, if they are both using the DB medium, KLAS will combine both serial and monograph DBs into a single Service Queue, may generate Duplication Orders with both serial issues and monograph titles, and will count all DB cartridges towards a single cutoff.

If you prefer to keep serials and monographs separate, on separate cartridges and with separate profile settings, you can do so by converting the serials to an alternate medium.

To switch a Serial to a new medium:

6. If the medium you want is **not** already in the list, Contact Keystone Customer Support with the code and full description you want to use (such as DS / Digital Serials).

7. Use **Batch Update Profile** to add the new Medium Profile and Service Queue for all Active subscribers of the serial. Contact Customer Support if you need assistance.

8. Check the Serial's **Requests tab** (ALT-6) for any Reserves currently on a Service Queue or in a Duplication Order:

   a. Double-click or Select and Enter each Reserve with an **SQ** status and DELETE (CTRL-D) them from the patron's Service Queue.

   b. Double-click or Select and Enter each Reserve in **DO** status and cancel the orders using the Functions - Duplication Orders menu. If you select the option to return the titles to the Service Queue, then DELETE (CTRL-D) the serial issue from the queue.

9. UPDATE (CTRL-O) the Serial record and select the new Medium. SAVE your changes (CTRL-S).

10. Use SEED SERIAL to remove any remaining Reserves under the previous Medium, and re-add the current Reserve for all Active Subscribers. See page **7** for more information.

Withdraw an Issue

Once an issue is no longer Retained (see UNDERSTANDING RETENTION on page **21**), KLAS will no longer automatically Reserve it for patrons, *without* the need to Withdraw it.

However, if an issue of a time-sensitive serial (such as a local newsletter or voting guide) becomes outdated before the next issue is available and should no longer be circulated, you can withdraw the issue when you are ready to stop sending it.

If in doubt, *don't delete***.**

Withdrawing Duplication on Demand Issues

Only local serial issues should be withdrawn. If there is a problem with an issue of an NLS serial, please contact Customer Support.

1. Check the **Requests tab** (ALT-6) and DELETE **all** requests (CTRL-D).
   For any Reserves currently on a Service Queue or in a Duplication Order:

   - Double-click or Select and Enter each Reserve with an **SQ** status and DELETE (CTRL-D) them from the Service Queue.

   - Double-click or Select and Enter each Reserve in **DO** status and cancel the orders using the Functions - Duplication Orders menu. If you select the option to return the titles to the Service Queue, then DELETE (CTRL-D) the serial issue from the queue.

2. On the **eDocuments tab** (ALT-9), select and DELETE the eDoc (CTRL-D).

3. Delete the file from books.klas.com using your FTP program.

Do not delete the issue record in KLAS—this should remain on the serial for historical and statistical purposes.

Withdrawing Physical Issues

1. Expand the tree view to Issue View, and expand the Issue you want to Withdraw.

2. Select each copy listed under that Issue.

   - If the Cir Status is OUT, use the Patron module to FIND (CTRL-F) the patron. Select the Item on the Patron's **Items tab** (ALT-6) and mark it LOST (Functions Menu - Items tab).

   - If the Cir Status is ASG, use the Patron module to FIND (CTRL-F) the patron. Select the Item on the Patron's **Items tab** (ALT-6) and UNASSIGN (ALT-CTRL-G).

3. Once you are a sure no copies for that Issue are Out or Assigned, the Issue can be deleted if you are certain it is no longer wanted on the record.

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Withdraw a Serial

When the serial as a whole should no longer be circulated, you can choose how completely you want to Withdraw it depending on whether you want to provide back-issues on request, and how likely the serial is to be resumed.

Update Title Record

1. On the Record's **Title tab** (ALT-1), MODIFY the record (CTRL-O).

2. Change the Title Status:

    - To **Withdrawn** if you no longer want to provide back-issues. This will block all duplication of this title.

    - To **Retrospective**, **Download Only**, or similar to indicate that the title is no longer Active, while still allowing duplication on request.

3. To provide the information at-a-glance on the Patron module Subscriptions tab, some libraries also:

    a. Add "Discontinued" or similar to the Title. (Ex: Rolling Stone - Discontinued)

    b. Add an X or Z to the KLAS ID.

    Adding the character to the beginning of the KLAS ID or just after the prefix (xSDS-OPR4 or SDS-zOPR4) will group discontinued serials together alphabetically; this can make it easier to browse the Active serials, but it can also make it harder to find a specific serial if you do not know the current status.

    Adding the character to the end of the KLAS ID (SDS-OPRx) will leave the serial in its original place alphabetically, while still clearly marking the ID as inactive.

    You should determine what changes your library wants to make to the Title record and apply them consistently.

4. SAVE the record when finished (CTRL-S).

5. To copy the subscribers to a replacement serial, contact customer support to batch CANCEL / TRANSFER ALL SUBSCRIBERS (see page **20**).

Delete the Title Record (not recommended)

If the Serial was a local serial or a long-discontinued MoC serial, you no longer want to distribute back issues via Duplication or WebOPAC, and you are **sure** you will not resume circulation of the serial, you *may* choose to delete the record. **If in doubt, *don't delete*.**

In addition to the above Title Record Updates:

1. Withdraw any physical issues; see WITHDRAW AN ISSUE on page **17**.

2. Check the **Requests tab** (ALT-6) and DELETE **all** requests (CTRL-D).
   For any Reserves currently on a Service Queue or in a Duplication Order:

   - Double-click or Select and Enter each Reserve with an **SQ** status and DELETE (CTRL-D) them from the Service Queue.

   - Double-click or Select and Enter each Reserve in **DO** status and cancel the orders using the Functions - Duplication Orders menu. If you select the option to return the titles to the Service Queue, then DELETE (CTRL-D) the serial issue from the queue.

3. DELETE (CTRL-D) all subscriptions; to give them a replacement subscription first, contact customer support (see page **19**).

4. Once there are **no** remaining Requests or active subscriptions, you can DELETE the serial (CTRL-D) from the **Title tab** (ALT-1).

Resume a Serial

If a withdrawn serial becomes active again (but was not Deleted):

1. On the Record's **Title tab** (ALT-1), MODIFY the record (CTRL-O).

2. Revert any changes made when withdrawing the title, such as:

   - Un-check OPAC Suppress box to resume displaying the serial on the OPAC.

   - Remove any reference in the Title to being withdrawn/discontinued.

   - Remove any x or z added to the KLAS ID indicating that it was withdrawn/discontinued.

3. Set the Title Status to Active.

4. SAVE the changes (CTRL-S).

5. Clean up subscribers list and contact customer support to CANCEL / TRANSFER ALL SUBSCRIBERS from another serial (see page **20**) if needed.

Cancel Subscribers

Cancel single subscriber

Any single subscriber can be cancelled from either the Patron module **Subscriptions tab** (Alt-8) or the Serials module **Subscribers tab** (Alt-5).

Preferred Method:

1. In either module, select the subscriber / subscription to be cancelled and Update the record (Ctrl-o).

2. Enter the current date in the **End Date** (Serials module) / **Cancelled** date field (Patron module).

3. Save the changes (Ctrl-s).

Alternate Method (preferred for emailed serials):

1. In either module, select the subscriber / subscription to be cancelled and Delete the record (Ctrl-d).

Cancelling the serial record by adding an End Date retains the history of when the patron started and stopped receiving the serial. However, deleting the subscription is also acceptable.

Cancel / Transfer all subscribers

A batch program can be used to cancel all subscriptions for a given serial or list of serials

When running the program to cancel a serial, a different serial can be designated to replace it. If using this option, all subscribers of the cancelled serial will receive a subscription to the replacement serial.

There is no batch option to resume all subscriptions, so batch cancel with care!

Contact customer support to request a Batch Cancel / Transfer, with the Serial ID(s) to cancel, and any replacement IDs.

Resume a Subscription

To resume a cancelled subscription, Update the record (Ctrl-o), and delete the End Date / Cancelled date. You can either leave the original Add Date or update it to the current date. Save the changes (Ctrl-s).

If the subscription was deleted instead of cancelled, it can be re-added as a new subscription (Ctrl-n).

Standard Functions & Terms

Serial Terminology

Serial Types

- **Dir/Direct** - Direct Serials are sent directly to the patrons from NLS. If the patron has any Direct serials, their Dir Status will automatically be set to Active. Direct serials are not stopped by making the patron Inactive in the medium or by a Block on the account.
- **Cir/Circulating** - Circulating Serials are circulated by the local library, such as locally-produced serials or NLS "MoC" Serials. To receive Circulating serials, a patron must have their Cir Status set to Active, and not have any Blocks on their account.
- **Pub/Publication** - Publications are serials sent out by the library that should not count as having served the patron, such as Newsletters.

Serial ID Numbering

The numbers at the end of each Serial ID are used by NLS as an indicator of a serial's format. The code is as follows:

1. Braille
2. Large Print
3. Cassette - now reissued as Digital Audio
4. Digital Audio
5. Digital Braille
7. Electronic / Download

Understanding Retention

For serials that are Retained according to the General Retention, the Specific Retention defines the number of issues that will be Reserved for new subscribers, or that are eligible to be Reserved for a subscriber that has previously been on hold or at their Cutoff.

When Reserving issues for a patron, KLAS will only add issues that are retained, come *after* the patron's previously received issue sequentially, and that the patron has not already had.

For example, if a patron last had the **February** issue of a Monthly serial, and next needs service in **April**:

- If the serial has a retention of **One Issue**, only the April issue will be Reserved, since it is the only unread Retained Issue.
- If the serial has a retention of **Two Issues**, both the March and April issues will be Reserved, since they are both unread Retained Issues.
- If the serial has a retention of **Three or more** issues, only the March and April issues will be Reserved, since any earlier Issues were either already received (February), or came before the last received issue sequentially (January).

KLAS

The Toolbar

The toolbar at the bottom of most KLAS screens provides easy access to the most common functions for that screen, in particular the basic records functions.

Screen reader users can access these functions from the menus instead, or many of these functions have keyboard shortcuts.

The basic record functions are: ADD, UPDATE, COPY, DELETE, SAVE, RESET, and CANCEL.

- ADD (CTRL-N) to create a new, blank record. On the Main tab of a module, that will be an entirely new record, such as a new patron or a new catalog title. In other locations, it will be a new entry in the table of that screen, such as a new Medium Profile on the Profile tab or a new Preference on the Preferences tab.

- UPDATE (CTRL-O) to open a record for updates. No changes can be made or saved to an existing record unless you use UPDATE first to enable these changes. New or Copied records are created already open for updates, so you can get right to work.

- COPY (ALT-CTRL-S) a record to create a new, identical version, which you can then update prior to saving. Not all screens allow you to copy records.

- DELETE (CTRL-D) a record to remove it from KLAS. On the Main tab of a module, delete will remove the entire record, such as the whole patron. Otherwise, it will only delete the selected table entry. Always use caution before deleting records from KLAS! When in doubt, ask if a particular type of record is ok to delete.

- SAVE (CTRL-S) will be disabled and appear light grey until a record is open for Updates *and* changes have been made. Once a record has been opened, you should always either Save or Cancel before changing screens.

- RESET (ALT-CTRL-Z) will be disabled and appear light grey until a record is open for Updates *and* changes have been made. Reset a record to remove any changes since the last Save, while still leaving the record open for Updates.

- CANCEL (CTRL-Z) will be disabled and appear light grey until a record is open for Updates *and* changes have been made. Cancel will discard any changes since the last Save and close the record.

Browse Tables

Many of the screens in KLAS have at least one table.

- Some screens provide **filters** or **search fields**, allowing you to reduce the number of records in the table and show you only the most relevant information.

- Some screens provide **data fields**, allowing you to view more information about the selected record and/or make changes to it.

- For most browse tables, you can select any column header to **sort** the rows by that column. Select the header again to reverse the sort order.

Rearrange Columns

You may find tables in KLAS that do not put the information you need the most in the order that is most convenient for you. You can set your own column order for these tables, which will be applied only to your own log-in.

1. Right-click anywhere in the browse table and select Move Columns.

2. Left-click and hold down a column header and drag it to the desired location.

3. Drag the bar between columns to adjust the width of the column to the left of the bar.

4. Once columns are in the desired order, right-click in the browse table and select Save Column Positions and Sizes.

Note: This one-time set up requires use of a mouse. Column position will be adjusted for Screen Reader users as part of AT Training; for later adjustments, AT users may need assistance.

Export

A common toolbar icon is Export to Excel, which will open the contents of that screen's browse table in Microsoft Excel. ⚔ (ALT-CTRL-X)

You can choose to export only the Visible Fields included on the screen, or export All Fields to include all of the data for that table.

You must have Excel installed on your workstation for this to function correctly.
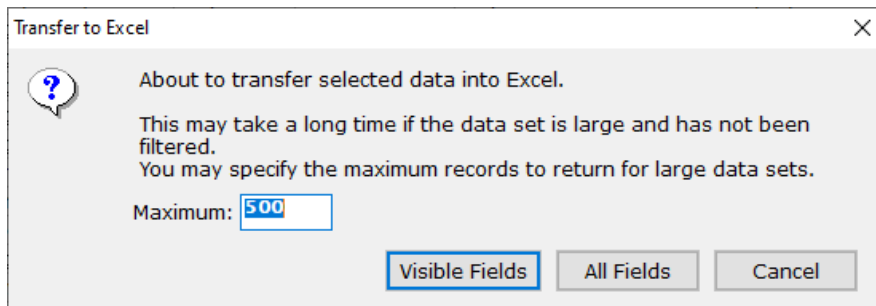
Some example tables where Export to Excel can be useful:

- To send a patron a list of their upcoming Duplication titles, EXPORT their Service Queue tab. Leave the default Maximum and select Visible Fields. Delete any unnecessary columns in Excel, then print or email the spreadsheet to the patron.

- To create a list of patrons in a specific city, use FIND ⚔ (CTRL-F) and fill in the City field to filter the browse table. Use EXPORT on the Find screen, set a high enough Maximum to include all patrons in that city, and export All Fields to include additional Contact information, such as email and mailing address.

- To create a list of current subscribers to a certain serial, Export the serial Subscribers tab with the filter set to Active. If desired, the list can then be additionally filtered in Excel based on Patron Status, Library ID, and so on.