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
The Serials module in Koha issued 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

- 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
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.
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
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.
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'.
KOHA: Serials

- From the page that opens up you can click ‘Edit Serial’ with the issue you want to receive checked.

- All three of these options will open up the issue receive form.
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.
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
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'.

![Image of KOHA Serials interface](image)
KOHA: Serials

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

- Click ‘Add recipients’ in order to add people to the routing list
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.
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
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
Subscription information will appear on bibliographic records under the ‘Subscriptions’ tab.
Clicking the ‘Subscription Details’ link will take you to the Subscription summary page in the staff client.

**Subscription for Computers in libraries 2010.**

<table>
<thead>
<tr>
<th>Information</th>
<th>Planning</th>
<th>Issues</th>
<th>Summary</th>
</tr>
</thead>
</table>

- **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

- 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
- 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.
There are two views:

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

  - **Issues for a subscription**
    - **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.

  - **Subscription information for Computers in libraries.**
    - **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            |
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

- 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.
If you don’t have a claim notice defined yet you will see a warning message that you need to first define a notice.
Clicking ‘Claims’ will open a report that will ask you to choose from your various serial vendors to generate claims for late issues.

### Claims

<table>
<thead>
<tr>
<th>Supplier: Amazon (1)</th>
</tr>
</thead>
</table>

### Missing Issues

**Filters:**
- **Status:** (All)
- **Title:**
- **Branch:** Nicole's Library
- **From** (MM/DD/YYYY)
- **To** (MM/DD/YYYY)  

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Branch</th>
<th>Title</th>
<th>Issue Number</th>
<th>Status</th>
<th>Since</th>
<th>Claim Date</th>
<th>Begin Claim</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amazon</td>
<td>FFL</td>
<td>Computers in Libraries</td>
<td>V. 31, N. 2</td>
<td>Expected</td>
<td>03/15/2011</td>
<td>Export Item date</td>
<td></td>
</tr>
</tbody>
</table>

**Export selected items data**

**Select notice:** Serial Claim

**Send notification**
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
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.

You can also click the ‘Advanced Search’ link to the right of the ‘Submit’ button to do a more thorough search of your 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.
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
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.
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.

<table>
<thead>
<tr>
<th>ISSN</th>
<th>Title</th>
<th>Note</th>
<th>Expiration date</th>
<th>Edit</th>
<th>Renew</th>
</tr>
</thead>
<tbody>
<tr>
<td>1041-7915</td>
<td>Computers in libraries.</td>
<td>Combined issues in Jan/Feb and Jul/Aug.</td>
<td>01/01/2012</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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
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

Another option is to click the ‘Renew’ link to the right of the subscription on the Serial Collection page

Serial Collection information for Computers in libraries. callnumber: MAG

<table>
<thead>
<tr>
<th>Subscription Num.</th>
<th>Frequency</th>
<th>Numbering pattern</th>
<th>Library</th>
<th>Call number</th>
<th>Notes</th>
<th>Routing</th>
<th>Renew</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1</td>
<td>1/Month</td>
<td>Volume, Number</td>
<td>FFL</td>
<td>MAG</td>
<td>Combined issues in Jan/Feb and Jul/Aug.</td>
<td>Edit Routing List</td>
<td>Renew</td>
</tr>
</tbody>
</table>
Once you click the ‘Renew’ link or button you will be presenting with renewal options.
Thanks