

# Serials

Serials actions can be accessed by going to the ‘More’ menu at the top of your screen and choosing ‘Serials’ or by clicking ‘Serials’ on the main Koha staff interface page. 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](#) and [system preferences](#) before using the serials module.

- *Get there:* More > Serials

## Managing serial frequencies

### Note

Only staff with the [serials permission](#) (or the [superlibrarian permission](#)) will be able manage frequencies.

Koha keeps a record of publication frequencies for easy management and duplication.

- *Get there:* More > Serials > Manage frequencies

From this page you can view all of the existing frequencies in your system.

[+ New frequency](#)

Frequencies					
Description	Unit	Issues per unit	Units per issue	Display order	Actions
2/day	day	2	1	1	<a href="#">Edit</a> <a href="#">Delete</a>
1/day	day	1	1	2	<a href="#">Edit</a> <a href="#">Delete</a>
3/week	week	3	1	3	<a href="#">Edit</a> <a href="#">Delete</a>
1/week	week	1	1	4	<a href="#">Edit</a> <a href="#">Delete</a>
1/2 weeks	week	1	2	5	<a href="#">Edit</a> <a href="#">Delete</a>
1/3 weeks	week	1	3	6	<a href="#">Edit</a> <a href="#">Delete</a>
1/month	month	1	1	7	<a href="#">Edit</a> <a href="#">Delete</a>
1/2 months	month	1	2	8	<a href="#">Edit</a> <a href="#">Delete</a>
1/3 months	month	1	3	9	<a href="#">Edit</a> <a href="#">Delete</a>
2/year	month	1	6	10	<a href="#">Edit</a> <a href="#">Delete</a>
1/year	year	1	1	11	<a href="#">Edit</a> <a href="#">Delete</a>
1/2 year	year	1	2	12	<a href="#">Edit</a> <a href="#">Delete</a>
Irregular		1	1	13	<a href="#">Edit</a> <a href="#">Delete</a>

You can edit, delete and create new ones.

## Adding a frequency

To add a new frequency, click on the ‘New frequency’ button.

**New frequency**

**Description:**  *Required*

**Unit:** None ▾

Note: one of the two following fields must be equal to 1

**Issues per unit:**

**Units per issue:**

**Display order:**

[Save](#) [Cancel](#)

- Description: this is the name that will appear in the drop-down menu when creating a new serial subscription; make sure it is descriptive
- Unit: this is the unit used for counting the cycle of publication. Choose either none (for irregular frequencies), day, week, month, or year.
- Issues per unit: this is how many issues are published during the unit chosen above (this will usually be 1).
- Units per issue: this is how many units must we count until the next issue is published.
- Display order: this is the display order in the drop-down menu when [creating a new subscription](#) (you may want to put the most used frequencies at the top and the less frequent at the bottom; the top-most position is 0). Several frequencies can have the same display order value. If this is the case, they will appear in the order they were created.

## Tip

To understand ‘issues per unit’ versus ‘units per issue’ you can read it as ‘<issues per unit> issue(s) every <units per issues> <unit>’. For example, a biweekly frequency (every two weeks) would be ‘1 issue every 2 weeks’. So ‘issues per unit’ would be 1 and ‘units per issue’ would be 2. See below for more examples.

## Examples

Here are some examples for most common serial publication frequencies.

Frequency	Unit	Issues per unit	Units per issue
Daily (“1 issue every 1 day”)	Day	1	1
Three times per week (“3 issues every 1 week”)	Week	3	1
Semiweekly (“2 issues every 1 week”)	Week	2	1
Weekly (“1 issue every 1 week”)	Week	1	1
Biweekly (“1 issue every 2 weeks”)	Week	1	2
Monthly (“1 issue every 1 month”)	Month	1	1
Bimonthly (“1 issue every 2 months”)	Month	1	2
Quarterly (“1 issue every 3 months”)	Month	1	3
Semiannual (“1 issue every 6 months”)	Month	1	6
Annual (“1 issue every 1 year”)	Year	1	1

Frequency	Unit	Issues per unit	Units per issue
Biennial (“1 issue every 2 years”)	Year	1	2

## Manage serial numbering patterns

### Note

Only staff with the [serials permission](#) or any of the serials sub-permissions (or the [superlibrarian permission](#)) will be able to manage numbering patterns.

Every time you create a new numbering pattern in serials you can save it for later use. These patterns are accessible via the ‘Manage numbering patterns’ page.

- *Get there:* More > Serials > Manage numbering patterns

This page will list for you the numbering patterns you have saved in the past as well as a few basic patterns.

### Numbering patterns

+ New numbering pattern

Showing 1 to 4 of 4 entries

Show 20 entries    « First    < Previous    Next >    Last »    Search:     ✕ Clear filter

Name	Description	Numbering formula	Display order	Actions
Number	Simple Numbering method	No. {X}	1	<a href="#">Edit</a> <a href="#">Delete</a>
Seasonal	Season Year	{X} {Y}	4	<a href="#">Edit</a> <a href="#">Delete</a>
Volume, Number	Volume Number 1	Vol. {X}, No. {Y}	3	<a href="#">Edit</a> <a href="#">Delete</a>
Volume, Number, Issue	Volume Number Issue 1	Vol. {X}, Number {Y}, Issue {Z}	2	<a href="#">Edit</a> <a href="#">Delete</a>

Showing 1 to 4 of 4 entries    « First    < Previous    Next >    Last »

### Note

If you have upgraded from an old version of Koha (before 3.14) you will see ‘Backup patterns’ listed for patterns. This is how Koha saved your old numbering patterns. You can edit these to give them more meaningful names from here.

## Adding a numbering pattern

To add new new pattern click the ‘New numbering pattern’ button.

## New numbering pattern

Name:

Description:

Numbering formula:

Display order:

	X	Y	Z
Label	<input type="text"/>	<input type="text"/>	<input type="text"/>
Add	<input type="text"/>	<input type="text"/>	<input type="text"/>
Every	<input type="text"/>	<input type="text"/>	<input type="text"/>
Set back to	<input type="text"/>	<input type="text"/>	<input type="text"/>
When more than	<input type="text"/>	<input type="text"/>	<input type="text"/>
Formatting	<input type="text"/>	<input type="text"/>	<input type="text"/>

Save Reset Cancel

## Test prediction pattern

Frequency:

First issue publication date:  ✖

Subscription length:

Locale:  If empty, English is used

	X	Y	Z
Begins with	<input type="text"/>	<input type="text"/>	<input type="text"/>
Inner counter	<input type="text"/>	<input type="text"/>	<input type="text"/>

Test pattern

- Name: this is the name that will appear in the drop-down menu when [creating a new serial subscription](#); make sure it is descriptive.
- Description: this is to further describe the numbering pattern; this does not appear when creating a new subscription, it only displays in the [numbering patterns table \(see above\)](#).
- Numbering formula: this is what is used to create the number for each issue. You can use up to three variables {X}, {Y}, and {Z} (see below). Along with the variables, you can enter any text you want to have appear in the issue number. You must also include any spaces you want to see in the issue numbers. The text will stay the same for each issue and the variables will vary.

## Warning

The variables must be in capital letters and between curly brackets.

## Examples

- Vol. {X} No {Y}
- Issue {X}
- {X} {Y}

- Display order: this is the display order in the drop-down menu when [creating a new subscription](#) (you may want to put the most used frequencies at the top and the less frequent at the bottom; the top-most position is 0). Several frequencies can have the same display order value. If this is the case, they will appear in the order they were created.

In the table, you need to enter the parameters for each variable.

- Label: this is simply a name for the variable, it is not used anywhere else, but it helps identify what the variable is supposed to be.
- Add: how many numbers or units are added to the variable.
- Each: the numbers or units added to the variable are added each how many issues.
- Set back to: this is used for cyclic numbering; enter the starting number.
- When more than: this is used for cyclic numbering; enter the last number.

## Tip

When filling out these four parameter ('add', 'each', 'set back to' and 'when more than'), work column by column and read it as a sentence: "Add 1 Every 1 issue, set back to 1 when greater than 10".

- **Formatting:** this is used if, instead of numbers, you want words to appear in your issue number. You can choose
  - Name of day (Monday, Tuesday, Wednesday, etc.)
  - Name of day (abbreviated) (Mon, Tue, Wed, etc.)
  - Name of month (January, February, March, etc.)
  - Name of month (abbreviated) (Jan, Feb, Mar, etc.)
  - Name of season (Spring, Summer, Fall, Winter)
  - Name of season (abbreviated) (Spr, Sum, Fal, Win)

## Warning

When filling out the table, you must always use numbers, even to represent names of days, months or seasons. Here are the equivalent for each

Days	Sunday	0
	Monday	1
	Tuesday	2
	Wednesday	3
	Thursday	4
	Friday	5
	Saturday	6
Months	January	0
	February	1
	March	2
	April	3
	May	4

	June	5
	July	6
	August	7
	September	8
	October	9
	November	10
	December	11
Seasons	Spring	0
	Summer	1
	Fall	2
	Winter	3

Before you save your numbering pattern, you can test it to make sure it behaves as you intend.

- Frequency: choose a frequency that fits with your numbering pattern.
- First issue publication date: choose a date where your test will start.
- Subscription length: enter a number of issues, weeks or months to test your numbering pattern; if the numbering pattern is cyclic, it is recommended to try at least two cycles to see the change in cycles and make sure it behaves correctly.
- Locale: if using names of days, months or season, you can choose the language in which these names will be displayed.

### Note

Locale doesn't currently work well with season names.

Next enter the parameters for your variables.

- Begins with: enter the first value for each variable, these should be the values of the issue entered in 'First issue publication date' above.
- Inner counter: enter how many issues have already passed in the cycle, so that Koha can calculate when to cycle back.

Click ‘Test pattern’ to see the results. If the result is what you expected, you can save your numbering pattern. If the results does not match your expectations, go back and tweak the parameters and test again.

Examples

Month and year for monthly serials

Numbering formula: {X} {Y}

	X	Y	Z
Label	Month	Year	
Add	1	1	
Every	1	12	
Set back to	0	0	
When more than	11	99999	
Formatting	Name of month		

Volume and number for monthly serials

Numbering formula: Vol.{X} No.{Y}

	X	Y	Z
Label	Volume	Number	
Add	1	1	
Every	12	1	
Set back to	0	1	
When more than	99999	12	
Formatting			

Season and year for quarterly serials

Numbering formula: {X} {Y}

	X	Y	Z
Label	Season	Year	
Add	1	1	
Every	1	4	
Set back to	0	0	
When more than	3	99999	
Formatting	Name of season		

Volume and number for weekly serials

Numbering formula: Vol.{X} No.{Y}

	X	Y	Z
Label	Volume	Number	
Add	1	1	
Every	52	1	
Set back to	0	1	
When more than	99999	52	
Formatting			

## Note

[Find more numbering patterns on Koha's wiki](https://wiki.koha-community.org/wiki/Serial_Pattern_Library) [https://wiki.koha-community.org/wiki/Serial\_Pattern\_Library].

## Adding a subscription

## Note



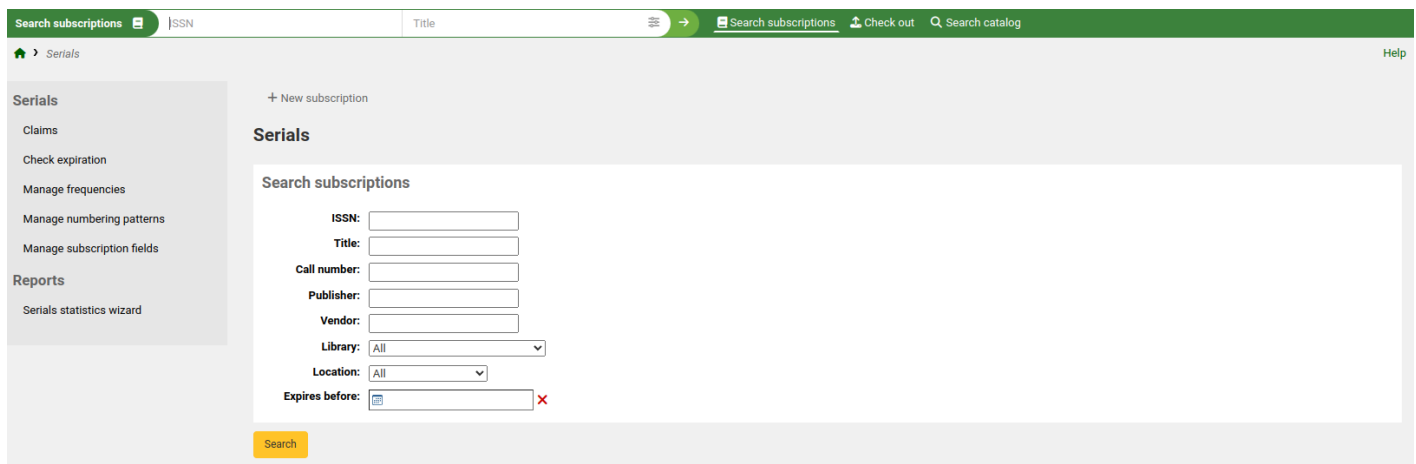
Only staff with the [create\\_subscription\\_permission](#) (or the [superlibrarian\\_permission](#)) will be able to add serial subscriptions.

Subscriptions can be added by clicking the ‘New’ button on any bibliographic record and choosing ‘New subscription’



The screenshot shows a bibliographic record interface. At the top, there is a toolbar with buttons: '+ New', 'Edit', 'Save', 'Add to cart', 'Add to list', 'Print', and 'Request article'. A dropdown menu is open under the '+ New' button, listing options: 'New record', 'New item', 'New subscription' (highlighted with a mouse cursor), and 'New child record'. Below the menu, the record details for 'Cat fancy' are visible, including ISSN: 2376-8258, Other title: Catster, Subject(s): Cats -- Periodicals, Genre/Form: Periodicals, DDC classification: 636.8, LOC classification: SF441 .J57, Continues: Cat fancy (San Juan Capistrano, Calif.), OPAC view: Open in new window, and MARC preview: Show. At the bottom, there are tabs for 'Holdings (0)', 'Descriptions (4)', and 'Acquisition details'. A message states 'No physical items for this record'.

Or click the ‘New subscription’ button in the serials module



The screenshot shows the 'Serials' module interface. On the left is a sidebar with links: 'Serials', 'Claims', 'Check expiration', 'Manage frequencies', 'Manage numbering patterns', 'Manage subscription fields', 'Reports', and 'Serials statistics wizard'. The main area is titled 'Serials' and contains a 'Search subscriptions' form. The form has fields for: ISSN, Title, Call number, Publisher, Vendor, Library (dropdown menu), Location (dropdown menu), and Expires before (calendar icon). A 'Search' button is at the bottom. The top navigation bar includes 'Search subscriptions', 'Check out', and 'Search catalog'.

If you are entering a new subscription from the Serials module you will be presented with a blank form (if creating new from a bibliographic record the form will include the record number info).

## Add a new subscription (1/2)

### Subscription details

**Vendor:**   Search for a vendor

**Record:**   Required

Subscriptions must be associated with a bibliographic record

Search for record |  Create record

**When receiving this serial:** ☐ Create an item record ☒ Do not create an item record

**When there is an irregular issue:** ☐ Skip issue number ☒ Keep issue number

**Manual history:** ☐

**Call number:**

**Library:**

**Public note:**

**Nonpublic note:**

**Patron notification:**   
Selecting a notice will allow patrons to subscribe to notifications when a new issue is received.

**Location:**

**item type for older issues:**

**Grace period:**  day(s)

**Number of issues to display to staff:**   
Default: 3 (StaffSerialIssueDisplayCount system preference)

**Number of issues to display to the public:**   
Default: 3 (OPACSerialIssueDisplayCount system preference)

Next →

- Vendor: can be found by either searching vendors entered via the [Acquisitions module](#) or manually entering the vendor ID number
  - Vendor information is not required
  - In order to claim missing and late issues you need to enter vendor information

If you wish to claim late or missing issues you must link this subscription to a vendor. Click OK to ignore or Cancel to return and enter a vendor

- Record: the biblionumber of the MARC record you'd like to link this subscription to
  - If you created a new subscription from a bibliographic record, the biblionumber and the title will already be filled in
  - You can search for an existing record by clicking on the 'Search for record' link below the boxes
  - If there is no existing bibliographic record for this subscription, you can create one by clicking on the 'Create record' link below the boxes
  - You can also manually enter the biblionumber for a record in the first box
- Next you can choose whether a new item is created when receiving an issue

## Note

If you add barcodes to issues or if you circulate them, choose to create an item upon reception

- When there is an irregular issue: choose how to handle irregularities in your subscription, by either skipping the issue number or keeping the issue number

## Note

If the numbers are always sequential, choose 'Keep issue number'

- Manual history: if checked, you will be able to enter serials outside the prediction pattern once the subscription is saved. For example, 'The library has issues from June 1974 to December 1996'. To do so, go to the 'Planning' tab on the subscription detail page once the subscription is saved and click 'Edit history'.

The screenshot shows the 'Subscription for Communications monthly' page with the 'Information' tab selected. At the top, there are action buttons: '+ New subscription for this serial', 'Edit', 'Renew', 'Receive', 'Close', and 'Share'. The main content area contains the following fields:

Beginning date:	31/12/2021	
Frequency:	1/month	
Manual history:	Disabled	
Number pattern:	Volume, Number	
Starting with:	12	2
Rollover:	99999	12
First arrival:	06/01/2020	
Number of issues:	12	

- Call number: your item's call number or call number prefix, this will be copied to items if they are created upon receiving.
- Library: the branch that owns this subscription.
  - If more than one library subscribes to this serial you will need to create a subscription for each library
  - This can be done easily by using the 'Edit as new (duplicate)' option found on the subscription information page and changing only the 'Library' field

The screenshot shows the 'Subscription for Communications monthly' page with the 'Planning' tab selected. A dropdown menu is open over the 'Edit' button, showing the following options: 'Edit subscription', 'Edit as new (duplicate)', 'Edit record', and 'Delete subscription'. The 'Edit as new (duplicate)' option is highlighted in yellow. The main content area contains the following fields:

Subscription ID:	202
Librarian identity:	fiona
Vendor:	
Biblio:	Communications monthly (52246)
OPAC view:	Open in new window.

On the right side, there are additional fields:

Location:	Periodicals
Call number:	JNL
Number of issues to display to staff:	12
Number of issues to display in OPAC:	12

- Public note: any notes you would like to appear in the OPAC for the patrons
- Nonpublic note: should be used for notes that are only visible to staff members via the staff interface

- Patron notification: you can pick a notice to send to patrons who subscribe to updates on this serial via the OPAC.
  - For this option to appear you need to make sure that you have a 'Serials (new issue)'-type notice set up in the ['Notices and slips' tool](#)
- Location: the shelving location, this will be copied to items if they are created upon receiving.
- Item type: if creating items upon reception, choose the item type of the items created.
- Item type for older issues: if creating items upon reception, choose the item type that will be assigned to previous issues when receiving new issues. This will only appear only if the [makePreviousSerialAvailable](#) is enabled.
- Grace period: the number of days before an issue is automatically moved from 'Expected' status to 'Late'. This mechanism requires that the [SerialsUpdate.pl cron job](#) is set up to run regularly.
- Number of issues to display to staff: this allows you to control how many issues appear by default in the staff interface catalog, in the 'Subscriptions' tab of the bibliographic record.
  - If this is left empty, the value of the [StaffSerialIssueDisplayCount](#) system preference will be used.

#### **Note**

This does not affect the number of items shown in the 'Holdings' tab if you create items for issues. It only affects the number of issues displayed in the 'Subscriptions' tab.

- Number of issues to display to the public: this allows you to control how many issues appear by default in the OPAC, in the 'Subscriptions' tab in bibliographic records
  - If this is left empty, the value of the [OPACSerialIssueDisplayCount](#) system preference will be used.

#### **Note**

This does not affect the number of items shown in the 'Holdings' tab if you create items for issues. It only affects the number of issues displayed in the 'Subscriptions' tab.

Once that data is filled in you can click 'Next' to enter the prediction pattern information.

## Add a new subscription (2/2)

### Serials planning

**First issue publication date:**  ✗ Required

**Frequency:**

**Subscription length:**   (enter amount in numerals)

**Subscription start date:**  ✗

**Subscription end date:**  ✗

**Numbering pattern:**  Required

**Publication date template:**

**Locale:**

If empty, English is used

☒ Show advanced pattern

### Additional fields

**Department:**  (Authorised values for DEPARTMENT)

**Target audience:**  This value will be filled with the 521\$a subfield of the selected bibliographic record.

- First issue publication date: enter the date of the issue you have in your hand, the date from which the prediction pattern will start
- Frequency: choose the frequency of your serial. There are several pre-defined options all of which are visible alongside your own custom frequencies in '[manage frequencies](#)'. If the frequency you are looking for is not there, you can [add a custom frequency](#).
- Subscription length: enter the number of issues, weeks, or months in the subscription. This is also used for setting up renewal alerts.
- Subscription start date: this is the date at which the subscription begins. This is used for setting up renewal alerts.
- Subscription end date: this should only be entered for subscriptions that have ended (if you're entering in a backlog of serials).
- Numbering pattern: choose how issues are numbered. The options here are the ones in the [manage numbering patterns](#) section.
  - If the numbering pattern you need has not been created yet, you can create a new one by clicking on 'Show advanced pattern' and then 'Modify pattern'. This is the same as [adding a numbering pattern](#) (see section above).

	X	Y
Begins with:	<input type="text" value="2023"/>	<input type="text" value="4"/>
Inner counter:	<input type="text" value="3"/>	<input type="text" value="0"/>

☒ Hide advanced pattern

Pattern name:  *Required*

Numbering formula:

Advanced prediction pattern:

	X	Y	Z
Label:	<input type="text" value="Volume"/>	<input type="text" value="Number"/>	<input type="text" value="Z"/>
Begins with:	<input type="text" value="2023"/>	<input type="text" value="4"/>	<input type="text"/>
Add:	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text"/>
Every:	<input type="text" value="12"/>	<input type="text" value="1"/>	<input type="text"/>
Set back to:	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text"/>
When more than:	<input type="text" value="99999"/>	<input type="text" value="12"/>	<input type="text"/>
Inner counter:	<input type="text" value="3"/>	<input type="text" value="0"/>	<input type="text"/>
Formatting:	<input type="text" value="Name of month"/>	<input type="text"/>	<input type="text"/>

- Publication date template: this is the template that will be used for the ‘Published on (text)’ field. You can use Template Toolkit to create your template. For example, [% serialseq %] [% publisheddate %] will fill the ‘Published on (text)’ field with the serial number and date.

## Note

You can use the following subscription fields in the template:

- serialseq
- serialseq\_x
- serialseq\_y
- serialseq\_z
- subscriptionid
- biblionumber
- status
- planneddate
- publisheddate
- publisheddatetext
- notes
- routingnotes

## Version

This field was added in Koha version 23.11.

- Locale: if using names of days, months or season, you can choose the language in which these names will be displayed.

## Note

Locale doesn’t currently work well with season names.

- Once a ‘Numbering pattern’ is chosen the numbering table will appear.

Numbering pattern:  *Required*

Locale:

If empty, English is used

	Volume	Number
Begins with:	<input type="text" value="2023"/>	<input type="text" value="4"/>
Inner counter:	<input type="text" value="3"/>	<input type="text"/>

[+ Show advanced pattern](#)

[▶ Test prediction pattern](#)

- Begins with: enter the first value for each variable, these should be the values of the issue entered in ‘First issue publication date’ above.
- Inner counter: enter how many issues have already passed in the cycle, so that Koha can calculate when to cycle back.
  - For example: If the first issue to receive is “vol. 4, no. 1, iss. 796”, you need to set up “inner counter = 0” But if it’s “vol. 4, no. 2, iss. 797”, the inner counter should be “1”.
- After filling in this data click the ‘Test prediction pattern’ button to see what issues the system will generate, if there are irregularities you can choose which issues don’t exist from the list presented.

## Prediction pattern

*End date is not consistent with subscription length.*

*Please check issues that are NOT published (irregularities)*

Number	Publication date	Not published
Vol 2023, No 4	01/04/2023	
Vol 2023, No 5	01/05/2023	<input type="checkbox"/>
Vol 2023, No 6	01/06/2023	<input type="checkbox"/>
Vol 2023, No 7	01/07/2023	<input type="checkbox"/>
Vol 2023, No 8	01/08/2023	<input type="checkbox"/>
Vol 2023, No 9	01/09/2023	<input type="checkbox"/>
Vol 2023, No 10	01/10/2023	<input type="checkbox"/>
Vol 2023, No 11	01/11/2023	<input type="checkbox"/>
Vol 2023, No 12	01/12/2023	<input type="checkbox"/>

[Done](#)

- If you have added [custom fields](#), they will be editable above the buttons at the bottom of the screen

Serials subscriptions (2 found)

Open (2)

Closed (0)

✔ Select all

✖ Clear all

| Actions:

✎ Edit selected serials

Showing 1 to 2 of 2 entries

Show

20

entries

« First

< Previous

Next >

Last »

Search:

✖ Clear filter

◊	ISSN	◊	Title	▲	Notes	◊	Library	◊	Location	◊	Call number	◊	Expiration date	◊	SERNOTE	◊	Actions
<input checked="" type="checkbox"/>			Catster magazine		Combined issues June/July		Main Library		Periodicals		JOURNALS		01/01/2014				<div>Serial receive</div>
<input checked="" type="checkbox"/>			Catster magazine						Periodicals		JNL		01/01/2024				<div>Serial receive</div>
	<div>Search ISSN</div>		<div>Search title</div>		<div>Search notes</div>		<div>Search library</div>		<div>Search location</div>		<div>Search callnumber</div>		<div>Search expiration da</div>		<div>Search SERNOTE</div>		

Showing 1 to 2 of 2 entries

« First

< Previous

Next >

Last »



From there, you can change:

- the vendor
- the shelving location
- the library
- the item type
- the public note
- the nonpublic note
- whether or not to create an item when receiving an issue
- the expiration date
- any [custom fields](#)

**Subscription batch edit**  
You are about to edit the following subscriptions:

ISSN	Title	Vendor	Location	Library	Item type	Public notes	Nonpublic notes	Call number	Create item when receiving	Expiration date
	Catster magazine (#151)	Blackwell UK Ltd	Periodicals	Main Library		Combined issues June/July		JOURNALS	No	01/01/2014
	Catster magazine (#202)		Periodicals		Journal			JNL	No	25/02/2022

**Vendor:**

**Location:**



**Library:**

**Item type:**

**Public note:**

**Nonpublic note:**

**Create item when receiving:**

**Expiration date:**   

**Description note:**

**SERNOTE:**

## Note

Leave the field unchanged to keep the original values.

## Receiving issues

### Note

Only staff with the [receive\\_serials\\_permission](#) (or the [superlibrarian\\_permission](#)) will be able to receive issues of existing serial subscriptions.

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

catster

→

Search subscriptions

Check out

Search catalog

Serials

Search results

Help

Serials

Claims

Check expiration

Manage frequencies

Manage numbering patterns

Manage subscription fields

Reports

Serials statistics wizard

Search subscriptions

ISSN:

Title:

catster

Call number:

New subscription

Serials subscriptions (1 found)

Open (1)

Closed (0)

✓ Select all | ✗ Clear all | Actions: Edit selected serials

Showing 1 to 1 of 1 entries

Show 20 entries

First

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Last

Search:

✗ Clear filter

ISSN	Title	Notes	Library	Location	Call number	Expiration date	Department	Actions
2376-8258	Catster magazine.		Centerville	On Display	CAT	2023-12-31	Veterinary science	Serial receive

Search ISSN

Search title

Search notes

Search library

Search location

Search callnumber

Search expiration date

Search Department

Showing 1 to 1 of 1 entries

First

Previous

Next

Last

From the search results you can click the ‘Serial receive’ button or you can click on the subscription title and then click the ‘Receive’ button.

Serials

Details for subscription #4

Help

Serial collection

Create routing list

Claims

Check expiration

Manage frequencies

Manage numbering patterns

Manage subscription fields

Reports

Serials statistics wizard

New subscription for this serial

Edit

Renew

Receive

Close

Subscription for Catster magazine.

Information

Planning

Issues

Summary

Subscription ID:

4

Location:

On Display

Librarian identity:

soutien

Call number:

CAT

Vendor:

Biblio:

Catster magazine. (1336)

OPAC view:

Open in new window.

Library:

Centerville

Items:

Serial receipt creates an item record.

Serial number:

Serial number is kept when an irregularity is found.

Grace period:

0

Additional fields:

Department:

Veterinary science

Target audience:

General public

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’

From the page that opens up, check the issue(s) you want to receive (the expected ones should be checked by default) and click ‘Edit serials’.

New subscription

Edit

Renew

Receive

Close

Serial collection information for *Catster magazine* (Periodicals) callnumber: JNL

Subscription summary

Subscription num.	Frequency	Numbering pattern	Library	Call number	Notes	
# 202	1/month	Volume, Number		JNL		Edit routing list

2022

2021

2020

Edit serials

Generate next

Multi receiving

Delete selected issues

Select all | Clear all

Edit	Date published	Date published (text)	Date received	Number	Status	Notes	Library	Routing
<input checked="" type="checkbox"/>	06/04/2022		06/04/2022	Vol 12, No 4	Expected			Print list
<input type="checkbox"/>	06/03/2022		29/03/2023	Vol 12, No 3	Arrived			Print list
<input type="checkbox"/>	06/02/2022		29/03/2023	Vol 12, No 2	Arrived	Combined issue recd		Print list

All three of these options will open up the issue receive form:

## Serial edition *Catster magazine* (Periodicals) callnumber: JNL

Numbered	Published on	Published on (text)	Expected on	Status	Notes
Issue   Vol 12, No 4	06/04/2022 ✖		06/04/2022 ✖	Expected	
Supplemental issue	✖		✖	Expected	
				Arrived	
				Late	
				Missing	
				Missing (never received)	
				Missing (sold out)	
				Missing (damaged)	
				Missing (lost)	
				Claimed	
				Not available	
				Delete	

Save + Multi receiving

- Choose ‘Arrived’ from the status drop-down menu to mark an issue as received.
- If you have decided to have an item record created for each issue an [item add form](#) will appear after choosing ‘Arrived’. You can add multiple copies using the ‘Number of copies to be made of this item’ option at the bottom of the form.
- If your issue has a supplemental issue with it, fill in the Supplemental issue information.
  - Key the entire numbering in the box after “Supplemental issue” no numbering will be inherited/auto-filled from the main issue, and exactly what you key in the box after “Supplemental issue” will be auto-filled in the item record’s Serial enumeration/chronology [MARC21 952\$h] (if you create item records).
    - E.g., key this in its entirety if it’s what you would like displayed: “v.69 no.3 (Mar. 2015) suppl.”
- If you have decided to have an item record created for each issue an [item add form](#) will appear for your supplement and for the issue itself
- Once you have entered your info you can click ‘Save’

## Serial collection

Each subscription has a Serial collection page available from the main Serials menu.

Serials > Details for subscription #4

Serials

- Serial collection
- Create routing list
- Claims
- Check expiration
- Manage frequencies
- Manage numbering patterns
- Manage subscription fields
- Reports
- Serials statistics wizard

Subscription for Catster magazine.

Information Planning Issues Summary

Subscription ID: 4 Location: On Display

Librarian identity: soutien Call number: CAT

Vendor:

Biblio: Catster magazine. (1336)

OPAC view: Open in new window.

Library: Centerville

Items: Serial receipt creates an item record.

Serial number: Serial number is kept when an irregularity is found.

Grace period: 0

Additional fields:

Department: Veterinary science

Target audience: General public

From this page you can manage additional tasks related to subscription issues such as receiving multiple issues and editing.

[+ New subscription](#)
[Edit](#)
[Renew](#)
[Receive](#)
[Close](#)

### Serial collection information for *Catster magazine* (Periodicals) callnumber: JNL

#### Subscription summary

Subscription num.	Frequency	Numbering pattern	Library	Call number	Notes
# 202	1/month	Volume, Number		JNL	<a href="#">Edit routing list</a>

[2022](#)
[2021](#)
[2020](#)

[Edit serials](#)
[Generate next](#)
[Multi receiving](#)
[Delete selected issues](#)

Select all | Clear all

Edit	Date published	Date published (text)	Date received	Number	Status	Notes	Library	Routing
<input checked="" type="checkbox"/>	06/04/2022		06/04/2022	Vol 12, No 4	Expected			<a href="#">Print list</a>
<input type="checkbox"/>	06/03/2022		29/03/2023	Vol 12, No 3	Arrived			<a href="#">Print list</a>
<input type="checkbox"/>	06/02/2022		29/03/2023	Vol 12, No 2	Arrived	Combined issue recd		<a href="#">Print list</a>

Clicking the Generate next button will generate the next issue for you and mark the previously expected issue as ‘Late’ automatically.

Check the box in the Edit column for one or more previous issues and then click the Edit serials button. This will bring you to the same screen as when you are [receiving issues](#). From there, you can edit the numbering, dates, status, and add notes.

## Creating a routing list

### Note

Only staff with the [routing.permission](#) (or the [superlibrarian.permission](#)) will be able to manage routing lists.

A routing list is a list of people who receive the serial before it goes to the shelf. To enable routing lists, set your [RoutingSerials](#) preference to ‘Use’.

When on the subscription page you will see a link to the left that reads ‘Create routing list’ or ‘Edit routing list’

[Serials](#) > Details for subscription #4
 [Help](#)

[+ New subscription for this serial](#)
[Edit](#)
[Renew](#)
[Receive](#)
[Close](#)

### Subscription for Catster magazine.

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

Subscription ID: 4

Librarian identity: southen

Vendor:

Biblio: [Catster magazine. \(1336\)](#)

OPAC view: [Open in new window.](#)

Library: Centerville

Items: Serial receipt creates an item record.

Serial number: Serial number is kept when an irregularity is found.

Grace period: 0

Location: On Display

Call number: CAT

Additional fields:

Department: Veterinary science

Target audience: General public

Clicking that link will bring you to the form to add a new routing list.

## Create routing list for *Catster magazine*

Issue:

Recipients:

[+ Add recipients](#)

Notes:

Save

From here, click ‘Add recipients’ to add users to the routing list. In the menu that appears you can filter patrons by part of their name, their library, or their patron category.

### Search for patron

Search:

Library:

Category:

Search

Clear

Browse by last name: [A](#)[B](#)[C](#)[D](#)[E](#)[F](#)[G](#)[H](#)[I](#)[J](#)[K](#)[L](#)[M](#)[N](#)[O](#)[P](#)[Q](#)[R](#)[S](#)[T](#)[U](#)[V](#)[W](#)[X](#)[Y](#)[Z](#)

Click ‘Add’ to the right of each name to add them to the routing list. When you have chosen all of the people for the list, click the ‘Close’ button to be redirected to the routing list.

## Edit routing list for *Catster magazine*

Issue:

Recipients:

Name	Rank	Delete
John Smith	1 <input type="text"/>	<input type="button" value="Delete"/>
AB Smith	2 <input type="text"/>	<input type="button" value="Delete"/>

[+ Add recipients](#)

Notes:

Save

From this form, you can play with the order of the users and add notes. If you always add the same note, you can enter it in the [RoutingListNote](#) system preference.

If the list looks the way you expect it to, click ‘Save’.

Next, you will be brought to a preview of the routing list. To print the list click ‘Save and preview routing slip.’ This will open a printable version of the list.

If [RoutingListAddReserves](#) is enabled, patrons listed in the routing list will automatically be added to the holds list for the issue.

To see a list of all of the routing lists for a specific patron is visit the [routing lists tab](#) on their patron record. Patrons are able to see a list of their own routing lists when logged into the OPAC in the [your routing lists](#) tab.

## Subscriptions in the staff interface

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 interface.

[Serials](#) > [Details for subscription #4](#) Help

[+ New subscription for this serial](#) [Edit](#) [Renew](#) [Receive](#) [Close](#)

### Subscription for Catster magazine.

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

**Subscription ID:** 4

**Librarian identity:** soutien

**Vendor:**

**Biblio:** [Catster magazine. \(1336\)](#)

**OPAC view:** [Open in new window.](#)

**Library:** Centerville

**Items:** Serial receipt creates an item record.

**Serial number:** Serial number is kept when an irregularity is found.

**Grace period:** 0

**Location:** On Display

**Call number:** CAT

**Additional fields:**

**Department:** Veterinary science

**Target audience:** General public

If you are using the [acquisitions](#) module to keep track of [serial subscriptions](#) you will see an extra ‘Acquisition details’ tab in your subscription details.

## Note

You can customize the columns of this table in the [‘Table settings’](#) section of the Administration module (table id: orders).

# Subscriptions in the OPAC

When viewing the subscription in the OPAC there will be several options. You can choose which tab appears by default with the [opacSerialDefaultTab](#) system preference.

Like in the staff interface, there will be a Subscriptions tab on the bibliographic record.

Under this tab will appear the number of issues you chose when [setting up the subscription](#) or in your [OPACSerialIssueDisplayCount](#) system preference. Clicking the ‘More details’ link will provide you with additional information about the serial history. You can set the default view of the serial history in the OPAC with the [SubscriptionHistory](#) system preference.

There are two views, brief and full. The brief serial subscription history will show basic information regarding the subscription.

From this brief display patrons can subscribe to be notified of new issues as they are released by clicking the ‘Subscribe to email notifications of new issues’ button. This link will only appear if you have chosen to notify patrons when [creating the subscription](#).

You can see those who subscribe to new issue alerts by going to the subscription page in the staff client and looking on the right of the ‘Information’ tab.

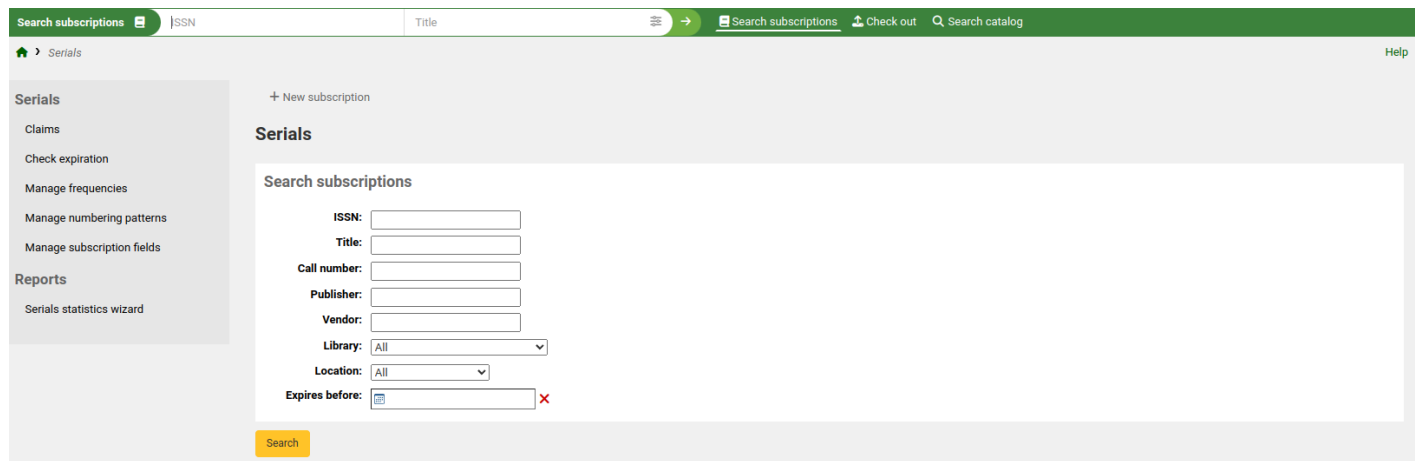
Whereas the full view shows extensive details, broken out by year, regarding the subscription

## Claiming late issues

## Note

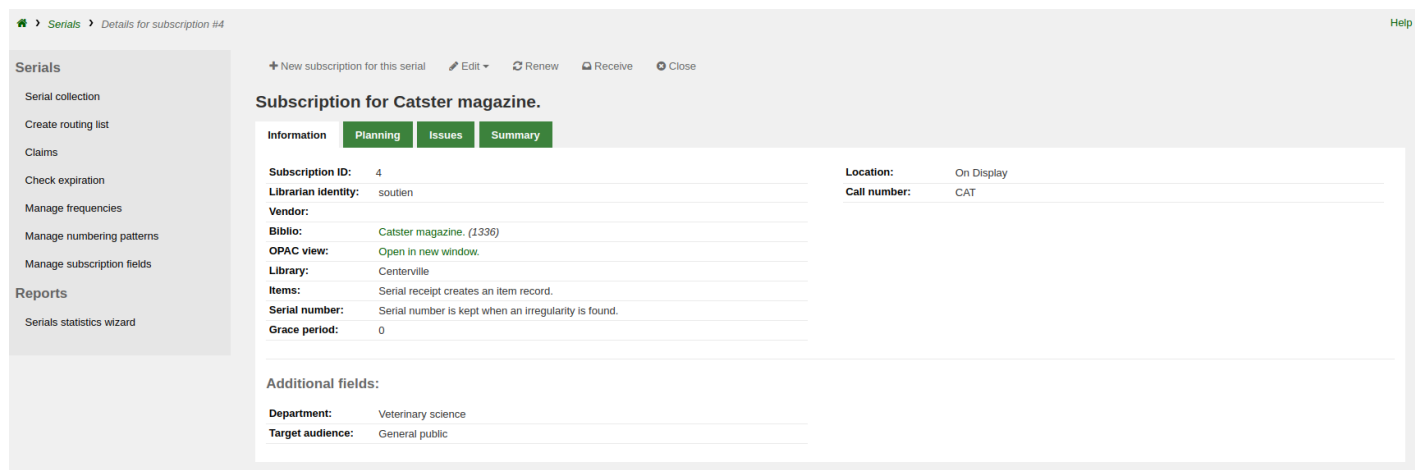
Only staff with the [claim\\_serials\\_permission](#) (or the [superlibrarian\\_permission](#)) will have access to this tool to claim late serial issues.

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 screenshot shows the Koha Serials Search interface. At the top, there is a green header bar with navigation links: 'Search subscriptions', 'Check out', and 'Search catalog'. Below the header, a sidebar on the left contains a 'Serials' menu with options like 'Claims', 'Check expiration', 'Manage frequencies', 'Manage numbering patterns', 'Manage subscription fields', 'Reports', and 'Serials statistics wizard'. The main content area is titled 'Serials' and features a 'Search subscriptions' form. The form includes input fields for 'ISSN:', 'Title:', 'Call number:', 'Publisher:', 'Vendor:', 'Library:' (a dropdown menu), 'Location:' (a dropdown menu), and 'Expires before:' (a date picker). A 'Search' button is located at the bottom of the form.

The links to claims also appears to the left of the subscription detail page



The screenshot shows the Koha Subscription detail page for 'Catster magazine'. The page has a green header bar with navigation links: 'Search subscriptions', 'Check out', and 'Search catalog'. Below the header, a sidebar on the left contains a 'Serials' menu with options like 'Serial collection', 'Create routing list', 'Claims', 'Check expiration', 'Manage frequencies', 'Manage numbering patterns', 'Manage subscription fields', 'Reports', and 'Serials statistics wizard'. The main content area is titled 'Subscription for Catster magazine.' and features a form with tabs for 'Information', 'Planning', 'Issues', and 'Summary'. The 'Information' tab is active, showing fields for 'Subscription ID:', 'Librarian identity:', 'Vendor:', 'Biblio:', 'OPAC view:', 'Library:', 'Items:', 'Serial number:', and 'Grace period:'. To the right of the form, there are fields for 'Location:' and 'Call number:'. At the bottom of the form, there is a section for 'Additional fields:' with fields for 'Department:' and 'Target audience:'.

If you don’t have a claim notice defined yet you will see a warning message that you need to first define a notice in the [Notices and slips tool](#).

Clicking ‘Claims’ will open a report that will ask you to choose from your various serial vendors to generate claims for late issues.

From the list of late issues you can choose which ones you want to send a claim email to by clicking the checkbox to the left of late issue, choosing the notice template to use and clicking the ‘Send notification’ button.

You can also export the results to a CSV file by choosing a [CSV profile](#) and clicking ‘Download selected claims’.

## Checking serial expiration



## Note

Only staff with the [check expiration permission](#) (or the [superlibrarian permission](#)) will have access to this tool to check serial subscription expiration dates.

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.

In the form that appears you need to enter at least a date to search by. You can also search by title, ISBN or library.

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.

If there is more than one subscription, you can check the boxes and click on ‘Renew selected subscriptions’ to renew all the serials. The serials will be renewed for the same amount of time as their previous subscription (i.e. if the last subscription for that serial lasted one year, the serial will be renewed for one year; if the last subscription was for 16 issues, it will be renewed for another 16 issues).

## Renewing subscriptions

### Note

Only staff with the [renew subscription permission](#) (or the [superlibrarian permission](#)) will be able to renew existing serial subscriptions.

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.

The screenshot shows a web interface for managing serial subscriptions. On the left is a sidebar with navigation links: Serials, Serial collection, Create routing list, Claims, Check expiration, Manage frequencies, Manage numbering patterns, Manage subscription fields, Reports, and Serials statistics wizard. The main content area is titled 'Subscription for Catster magazine.' and has a top bar with buttons: '+ New subscription for this serial', 'Edit', 'Renew', 'Receive', and 'Close'. Below the title are four tabs: 'Information' (selected), 'Planning', 'Issues', and 'Summary'. The 'Information' tab contains the following fields:

Subscription ID:	4	Location:	On Display
Librarian Identity:	soutien	Call number:	CAT
Vendor:			
Biblio:	Catster magazine. (1336)		
OPAC view:	Open in new window.		
Library:	Centerville		
Items:	Serial receipt creates an item record.		
Serial number:	Serial number is kept when an irregularity is found.		
Grace period:	0		

Below these fields is a section titled 'Additional fields:' with two more rows:

Department:	Veterinary science
Target audience:	General public

Once you click the ‘Renew’ button you will be presented with renewal options.

- Start date: enter the date your subscription period starts.
- Subscription length: enter the number of issues, weeks or months your subscription lasts

- Library: enter the library for which this subscription is, this will only appear if [RenewSerialAddsSuggestion](#) is set to ‘Add’
- Note for the librarian that will manage your renewal request: enter any notes you might have about this renewal. This will only appear if [RenewSerialAddsSuggestion](#) is set to ‘Add’

Click ‘Submit’.

If your [RenewSerialAddsSuggestion](#) system preference is enabled, renewing a subscription will create a purchase suggestion in the [acquisitions module](#) so that your acquisitions staff can manage it.

## Searching 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, as well as a search form in the middle of the page.

ISSN	Title	Notes	Library	Location	Call number	Expiration date	Department	Actions
2376-8258	Catster magazine.		Centerville	On Display	CAT	2023-12-31	Veterinary science	Serial receive

You can also click the ‘More options’ icon in the search box at the top of the page and click the ‘Advanced search’ link to do a more thorough search of your serials.

### Note

If you have [additional fields](#) that are searchable, they will appear in this advanced search form.

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.

## Serials subscriptions (2 found)

Open (2)

Closed (0)

✓ Select all | ✕ Clear all | Actions: ✎ Edit selected serials

Showing 1 to 2 of 2 entries

Show 20 entries

« First

< Previous

Next >

Last »

Search:

✕ Clear filter

ISSN	Title	Notes	Library	Location	Call number	Expiration date	SERNOTE	Actions
✓	Catster magazine	Combined issues June/July	Main Library	Periodicals	JOURNALS	01/01/2014		Serial receive
✓	Catster magazine			Periodicals	JNL	01/01/2024		Serial receive
Search ISSN	Search title	Search notes	Search library	Search location	Search callnumber	Search expiration da	Search SERNOTE	

Showing 1 to 2 of 2 entries

« First

< Previous

Next >

Last »

### Note

If you have a lot of subscriptions and loading results takes a lot of time or resources, you can use the [SerialsSearchResultsLimit](#) system preference to limit the number of results per page.

## Serial statuses

When [receiving an issue](#), you change the status of the issue to ‘Arrived’. There are more statuses that can be used to describe serial issues.

### Note

See also: [Serials table in the FAQ section](#).

- Expected: this is the status that is automatically assigned to a new issue when it is created. It means the issue hasn’t arrived, but it is not late yet.
- Arrived: this is the status used when [receiving an issue](#). It means the issue has been received by the library.
- Circulating: this status means the issue is circulating through a printed [routing list](#). It is not assigned automatically, but you can use it to indicate to patrons that it is not currently available.

### Note

This status is only available when the current status is not ‘Expected’.

- Out for binding: use this status if you send issues to be bound in volumes. If you create items for each serial issue, you can also use the [preservation module](#) to track items sent out to be bound. If you don’t create items, you can use this status to track which issue was sent out.

### Note

This status is only available when the current status is not ‘Expected’.

- Bound: use this status to indicate that this issue is bound in a volume.

### Note

This status is only available when the current status is not 'Expected'.

- Late: this status means the issue still has not arrived and the date you expected it to arrive has passed. The late date is determined by the publication date and the grace period entered in the [subscription](#). This status is automatically assigned to 'Expected' issues if a new one is created by clicking 'Generate next' in the [Serial collection](#) section. It can also be applied automatically using the [SerialsUpdate.pl cron job](#). If you manually set an issue to 'Late', the next one will automatically be generated.
- Missing: you can assign this status to issues that are missing. If you don't create an item for each serial issue, this can be used to indicate which issue is missing (if an item is created, you can use the item's [lost status](#) instead of or in addition to the issue's status). More specific missing statuses are also available.
  - Missing (never received): use this status to indicate that the issue was never received from the vendor.
  - Missing (sold out): use this status to indicate that the issue is no longer available to purchase.
  - Missing (damaged): use this status to indicate that the issue was damaged and is no longer available.
  - Missing (lost): use this status to indicate that the issue has been lost.
- Claimed: this status means that the issue still has not arrived, but a [claim was sent to the vendor](#). It is automatically assigned through the claim process, but can be assigned manually if you don't send the claims through Koha.
- Not available: you can assign this status to issues that are not available, for any reason.
- Delete: if you choose this status and save, the issue will be deleted, and the next one will be created.