

Serials: setting up prediction patterns in Alma

Exlibris documentation:

Setting up prediction patterns:

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_\(English\)/Resource_Management/050Inventory/040Managing_Physical_Resources#Setting_Up_Prediction_Patterns_to_Automatically_Create_Serial_Items](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Resource_Management/050Inventory/040Managing_Physical_Resources#Setting_Up_Prediction_Patterns_to_Automatically_Create_Serial_Items)

Prediction patterns presentation:

https://knowledge.exlibrisgroup.com/@api/deki/files/51920/Serials_-_Prediction_Patterns_and_Serial_Check-in.pptx

Prediction patterns video:

https://knowledge.exlibrisgroup.com/Alma/Training/02_What's_New_Videos_2015/12_January_2015_Release/Prediction_Patterns_for_Periodical_Holdings

CSUN document on Marc holdings records for serials:

https://docs.google.com/document/d/1ispVYVNAdjZSP2RdgvqwBu7oz4pQ_caOQp2C16CZ1mA/edit?usp=sharing

CSU(N) prediction pattern examples 853 (spreadsheet)

<https://docs.google.com/spreadsheets/d/1ZKpJMFcT3cZVvsbVqQXQtNDiSQ1mmyKxec5zDTtgc5s/edit?usp=sharing>


Additional examples

<https://docs.google.com/document/d/1SRjuy6-0K69u5n-EENQhHm4d1Oegu486MscO5RzoMi4/edit>

Quarterly

Example: Career development quarterly (oclc 13871654, issn 0889-4019)

IZ record before creating PO line

1  [The Career development quarterly.](#)
Journal {Journal - Physical} By National Career Development Association (U.S.) (Alexandria, VA : National Career Developm
Vol. 35, no. 1 ([Sept. 1986])-)
ISSN: 0889-4019
Subject: Vocational guidance--Periodicals. Career development--Periodicals. Career education--Periodicals. and others **Language**
Record number: ocm13871654-01cals_network
Availability: [Physical version](#) at **RPM: RPMpr; HF1 .V62** (1 copy, 1 available)
[Physical version](#) at **RPM: asrsp; HF1 .V62** (29 copies, 29 available)
[Edit](#) | [Order](#) | [Request](#) | [Document Delivery](#) | [Add to reading list](#) | [Holdings](#) | [Items](#) | [Add to collection](#) | [Linked Data](#) |
[Reminders](#) | [More info](#)

1. Create PO Line

PO Line Owner and Type

1 **The Career development quarterly.**
Journal {Journal - Physical} By National Career Development Association (U.S.) (Alexandria, VA : National Career Deve
ISSN: 0889-4019
Subject: Vocational guidance--Periodicals. Career development--Periodicals. Career education--Periodicals. and others

Description * The Career development quarterly.

Purchase Type * Print Journal - Subscription

PO Line Owner * Main Stacks

Load from Template

Assign Inventory Manually

You are choosing to assign inventory manually because a holdings record already exists (for RPM/prr) and you will add new issues to it. (RPM is the reserves, periodicals and magazine department in the CSUN Oviatt Library and prr is the periodical reading room within RPM.)

If you are ordering a brand-new title without existing inventory, you will not assign inventory manually and Alma will create a new holdings record along with the PO line.

Confirmation Message

This PO Line will not create an inventory item

Cancel

Confirm

PO line summary (POL-256)

PO Line Summary [Back to PO Line list](#) [Save and continue](#)

Description [The Career development quarterly.. National Career Development Association. Vol. 35, no. 1 \(Sept. 1986\).. 0889-4019, ISSN](#) Order/Line - / POL-256 Status In Review (2017-02-27)

Order line type Print Journal - Subscription PO Line Owner Main Stacks Sent Date -

Summary Description Alerts Invoice Lines Associated PO Lines Communications Interested Users History

Attachments

Ordered items

Quick Add

Number of holdings to create* Library/Location [Add](#)

No records were found.

Receiving note

Vendor information

Material Supplier* [Zron fake vendor for testing \(zron\)/ testing acct \(zron1\)](#)

Claiming grace period (days) Expected receipt after ordering (days)

Or expected receipt date [Subscription interval](#)

Pricing

List Price* Net price

Quantity for pricing* Discount (%)

Amount paid in current FP -

(Under Ordered items, Quick add, leave section blank if you are assigning inventory manually. Otherwise, you may add a library/location.)

The claiming grace period¹, expected receipt date and subscription interval are important because they affect the expected arrival date of future issues and when late issues will appear in the Claims task list.

Subscription interval: "The receipt interval, in days, of the continuous order (such as 30 for monthly, 90 for quarterly, and so forth). This value is used to calculate the claim date"

#	Fund Name	Percent	Amount	
1 1	Lauren's Party Fund (07/01/2016 - 06/30/2017) (6,448.83 USD)	100.0%	115.00 USD	Delete
2 Total	-	100.0%	115.00 USD	

Redistribute Lines

PO Line details

Acquisition method: Purchase at Vendor System
Material type: Issue
Invoice status: No invoice
Reporting code: Printed Serial
Rush:
Cancellation restriction:
Cancellation restriction note:
Identifier: 0889-4019
Proposed Identifier:
Vendor reference number:
Vendor reference number type:
Note to vendor:
Vendor invoice number: -

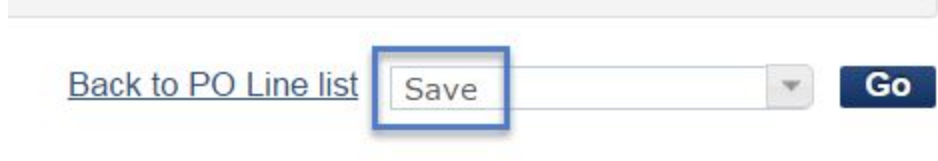
Renewal

Manual renewal:
Subscription from date:
Subscription to date:
Renewal date*: 01/01/2018
Renewal reminder period (days)*: 0

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_\(English\)/Acquisitions/040Renewals/020Processing_Renewals#Editing_PO_Line_Information_.E2.80.93_Renewals](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Acquisitions/040Renewals/020Processing_Renewals#Editing_PO_Line_Information_.E2.80.93_Renewals)

¹ "A grace period (in days) after the expected receipt/activation date, after which the PO line is sent to the claims task list (see Processing Claims). The default value is taken from the Claiming grace period field on the Vendor Account Details page (Acquisitions > Acquisitions Infrastructure > Vendors) for one-time PO lines, and from the Subscription grace period field on the Vendor Account Details page for continuous PO lines." ([link](#))

Save



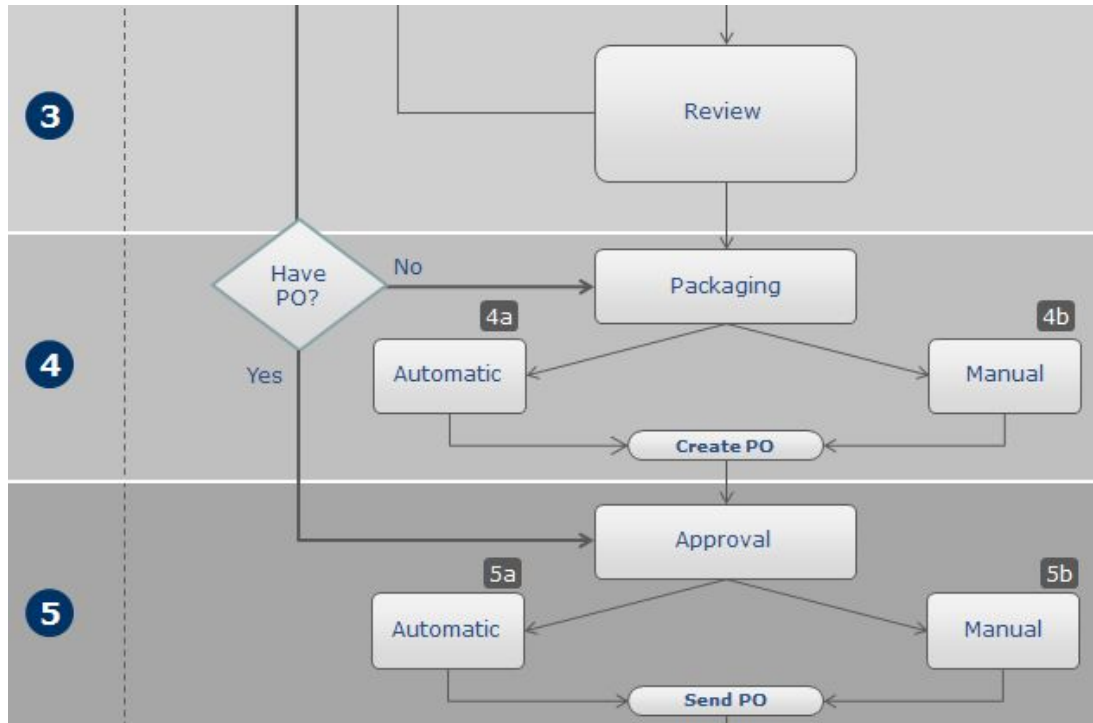
Background

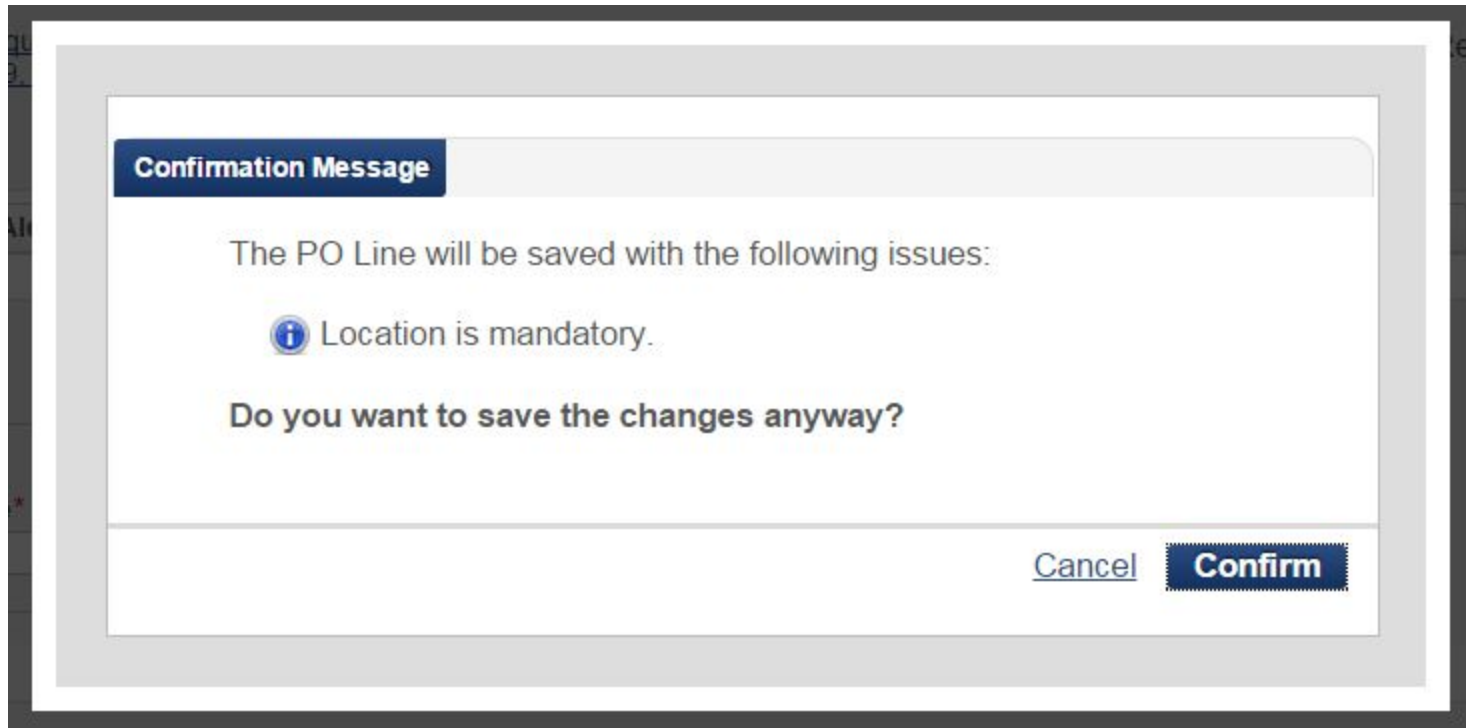
To set up a prediction pattern for a serial in Alma, you must have a PO line associated with the holdings record. If you “Save” the PO Line (rather than “Save and Continue”) the PO line enters a status of “In Review”.

“Save – The information you entered is saved, and the PO line remains in its current workflow stage (if you just created the PO line manually, it remains In Review). Use this option if you are assigning inventory manually, if you are unsure if you want the PO line to continue to the following stage of the purchasing workflow, or if you are editing PO lines from the Claims page.” [Link to Exlibris Documentation](#). See also [step 3 of purchasing workflow](#).

With a PO line “in review” you can then associate it with a holdings record and set up a prediction pattern in the holdings record through Metadata Editor. (See sections below.)

The PO line does not need to be in packaging (step 4) or sent (step 5) in order for you to set up a prediction pattern.





(Location will be added by associating PO line with an existing holdings record.)

Associate the holdings record (RPM/prr) to POL-256

1 [The Career development quarterly.](#)
Journal {Journal - Physical} By National Career Development Association (U.S.) (Alexandria, VA : National Career Development Association
 Vol. 35, no. 1 ([Sept. 1986]-)
 ISSN: 0889-4019
Subject: Vocational guidance--Periodicals. Career development--Periodicals. Career education--Periodicals. and others **Language:** English
Record number: ocm13871654-01cals_network
Availability: [Physical version at RPM: RPMpr; HF1 .V62](#) (1 copy, 1 available)
[Physical version at RPM: asrsp; HF1 .V62](#) (29 copies, 29 available)
[Edit](#) | [Order](#) | [Request](#) | [Document Delivery](#) | [Add to reading list](#) | [Holdings](#) | [Items](#) | [Add to collection](#) | [Linked Data](#) |
[Reminders](#) | [More info](#)

List of Holdings [Back](#)

Resource description [The Career development quarterly. National Career Development Association Alexandria, VA : Vol. 35, no. 1 \(\[Sept. 1986\]- \[0889-4019\]\)](#)


Filter Find: in:

1 - 2 of 2 Records

ID	Library	Location	Call Number	Copy Id	Access Number	No. of Items	Available	PO Line	Actions
1 <input type="checkbox"/> 2220564330002914	Reserves, Periodicals, and Microforms	Stored Periodical	HF1 .V62	-	-	29	29	-	<input type="button" value="Actions"/>
2 <input type="checkbox"/> 2263122380002914	Reserves, Periodicals, and Microforms	Floor4 East Periodicals (RPM)	HF1 .V62	-	-	1	1	-	<input type="button" value="Actions"/> <ul style="list-style-type: none"> View Edit Relink View items Associate a PO Line

Please Select a PO Line

PO Line



[Cancel](#) **Update**


Select PO Line [Cancel](#) **Select**

Filter **Active**

Find : 256 in : All [Go](#)

1 - 1 of 1 Records

1 [The Career development quarterly., National Career Development Association, Vol. 35, no. 1 \(\[Sept. 1986\]\)- , 0889-4019, ISSN](#)
 MMS ID: 991001739919702914

Assigned to: Jun, Marcus (2017-02-27) 

Type: Print Journal - Subscription **PO Line Owner:** Main Stacks **Standard number:** 0889-4019 **Order/Line:** - / **POL-256**

Copies: - **Total price:** 115.00 USD **Funds:** Lauren's Party Fund (100.0%) (07/01/2016 - 06/30/2017)




Vendor/Account: Zron fake vendor for testing / testing acct zron1 **Vendor reference ID:** - **Expected delivery:** 01/01/2017

Renewal date: 01/01/2018 **Receiving note:** -

Mandatory information is missing or erroneous, Items already exist in the repository

[Cancel](#) **Select**

Please Select a PO Line

PO Line   

[Cancel](#) **Update**

Confirmation that POL-256 is associated with holdings record.

List of Holdings [Back](#)

Resource description [The Career development quarterly. National Career Development Association Alexandria, VA : Vol. 35, no. 1 \(Sept. 1986\)- \[0889-4019\]](#)

Filter Find : in :

1 - 2 of 2 Records Columns

	ID	Library	Location	Call Number	Copy Id	Access Number	No. of Items	Available	PO Line	
1	2220564330002914	Reserves, Periodicals, and Microforms	Stored Periodical	HF1 .V62	-	-	29	29	-	<input type="button" value="Actions"/>
2	2263122380002914	Reserves, Periodicals, and Microforms	Floor4 East Periodicals (RPM)	HF1 .V62	-	-	1	1	POL-256	<input type="button" value="Actions"/>

[Back](#)

Return to edit POL-256

CSUN Alma  pol-256 

1 [The Career development quarterly., National Career Development Association, Vol. 35, no. 1 \(\[Sept. 1986\]\)-, 0889-4019, ISSN](#)

Order/ Line status: - / [In Review](#)

MMS ID: 991001739919702914

Assigned to: Jun, Marcus (2017-02-27)



Type: Print Journal - Subscription PO Line Owner: Main Stacks Standard number: 0889-4019 Order/Line: -

/ [POL-256](#)

Copies: Reserves, Periodicals, and Microforms - Floor4 East Periodicals (RPM) (1) Total price: 115.00 USD Funds: Lauren's Party Fund (100.0%) (07/01/2016 - 06/30/2017)

Vendor/Account: Zron fake vendor for testing / testing acct zron1 Vendor reference ID: - Expected delivery: 01/01/2017

Renewal date: 01/01/2018 Receiving note: -

Mandatory information is missing or erroneous, Items already exist in the repository

[View](#) | [Go to task list](#) | [Change Bib Reference](#) | [Cancel](#)

1 - 1 of 1 Records 

1 [The Career development quarterly., National Career Development Association, Vol. 35, no. 1 \(\[Sept. 1986\]\)-, 0889-4019, ISSN](#)

MMS ID: 991001739919702914

Type: Print Journal - Subscription PO Line Owner: Main Stacks Standard number: 0889-4019 Order/Line: -

/ [POL-256](#)

Copies: Reserves, Periodicals, and Microforms - Floor4 East Periodicals (RPM) (1) Total price: 115.00 USD Funds: Lauren's Party Fund (100.0%) (07/01/2016 - 06/30/2017)

Vendor/Account: Zron fake vendor for testing / testing acct zron1 Vendor reference ID: - Expected delivery: 01/01/2017

Renewal date: 01/01/2018 Receiving note: -

Mandatory information is missing or erroneous, Items already exist in the repository

[Edit](#) | [Assign to](#) | [Release assignment](#) | [Order Now](#) | [Relink](#) | [Change Bib Reference](#) | [Cancel](#) | [Delete](#)

PO line summary confirms that PO line is associated with the RPM/prr holdings record.

PO Line Summary [Back to PO Line list](#) Save and continue **Go**

Description [The Career development quarterly.. National Career Development Association, Vol. 35, no. 1 \(Sept. 1986\)\)- 0889-4019, ISSN](#) Order/Line - / POL-256 Status In Review (2017-02-27)

Order line type Print Journal - Subscription PO Line Owner Main Stacks Sent Date -

Summary Description Alerts Invoice Lines Associated PO Lines Communications Interested Users History Notes

Attachments

Ordered items

Quick Add

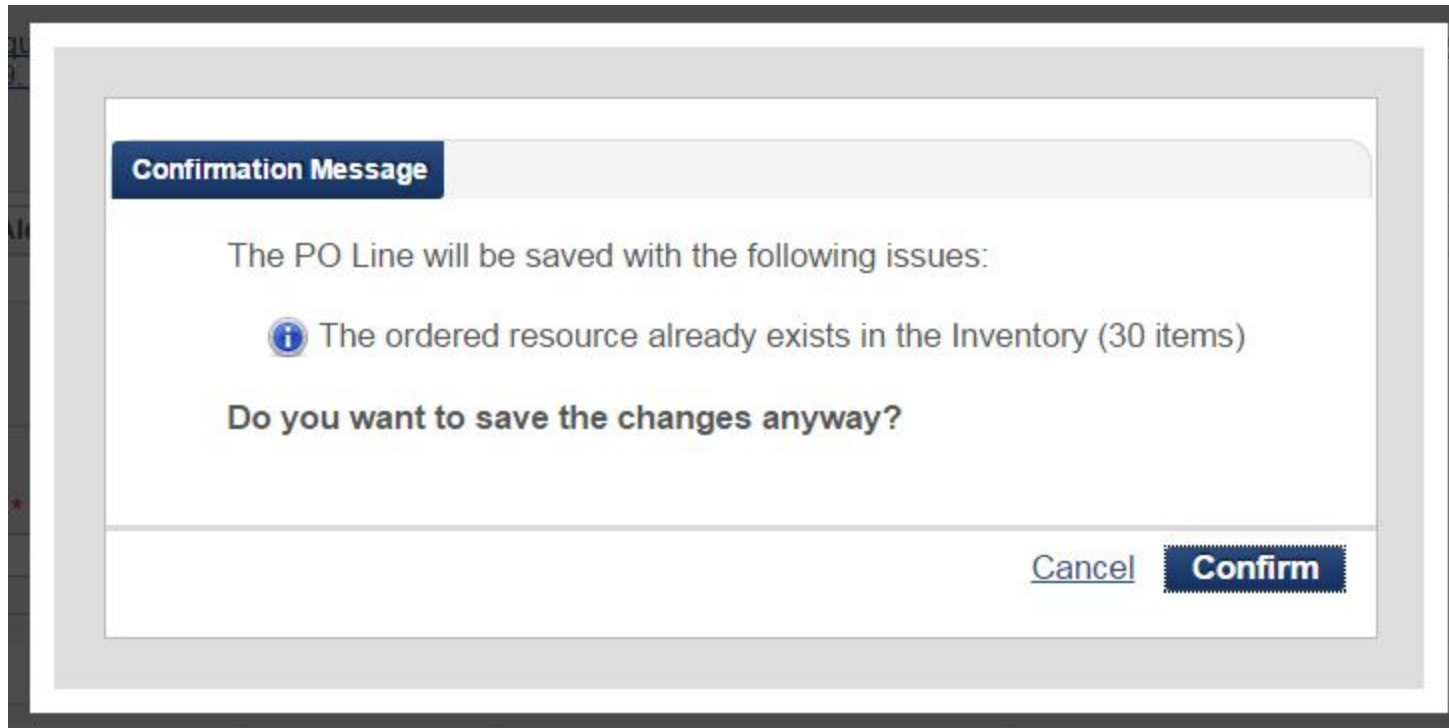
Number of holdings to create* Library/Location

1 Add

Library	Location	Call Number	Copy ID	Summary	# of items	Actions
1 Reserves, Periodicals, and Microforms	Floor4 East Periodicals (RPM)	HF1 .V62	-	-	1	Actions

Save and continue

[Back to PO Line list](#) **Save and continue** **Go**



(It's okay that inventory already exists because this is a serial and we have existing issues.)

PO line is in status: auto packaging

 PO Line: POL-256, with title: The Career development quarterly., was updated and in status: Auto Packaging

2. Setting up prediction patterns in holdings record through Metadata editor.

1 **The Career development quarterly.**
Journal {Journal - Physical} By National Career Development Association (U.S.) (Alexandria, VA : National Career Development Association
 Vol. 35, no. 1 ([Sept. 1986])-
ISSN: 0889-4019
Subject: Vocational guidance--Periodicals. Career development--Periodicals. Career education--Periodicals. and others **Language:** English
Record number: ocm13871654-01cals_network
Availability: [Physical version at RPM: RPMpr; HF1 .V62](#) (1 copy, 1 available)
[Physical version at RPM: asrsp; HF1 .V62](#) (29 copies, 29 available)
[Edit](#) | [Order](#) | [Request](#) | [Document Delivery](#) | [Add to reading list](#) | **Holdings** | [Items](#) | [Add to collection](#) | [Linked Data](#) |
[Reminders](#) | [More info](#)

Actions, Edit

List of Holdings [Back](#)

Resource description [The Career development quarterly. National Career Development Association Alexandria, VA : Vol. 35, no. 1 \(\[Sept. 1986\]\)-\[0889-4019\]](#)

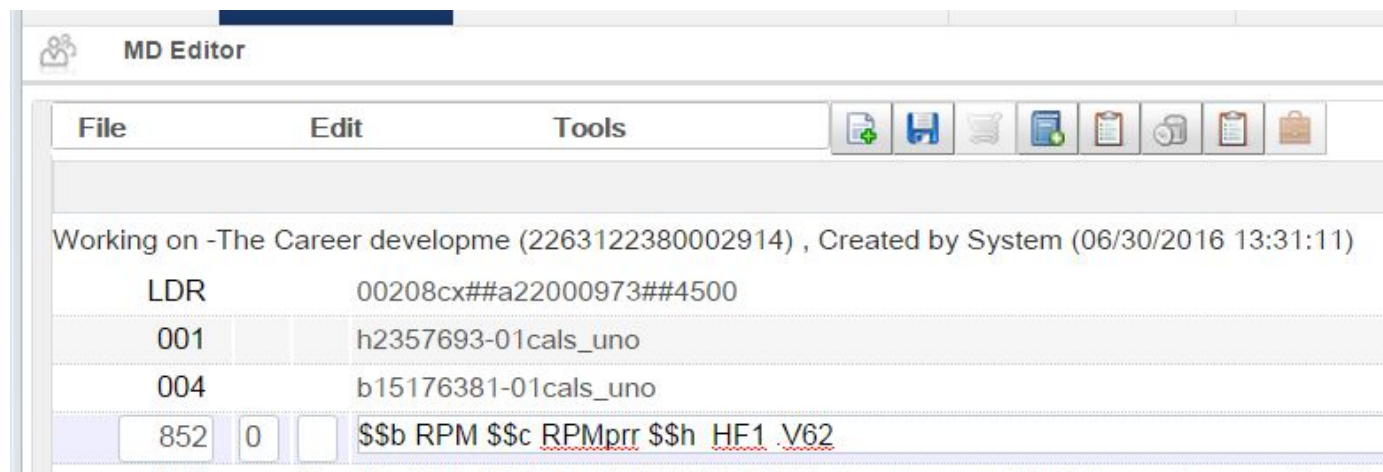
Filter Find: in: Call number

[Delete Holdings](#) [Add new Holdings](#) 1 - 2 of 2 Records

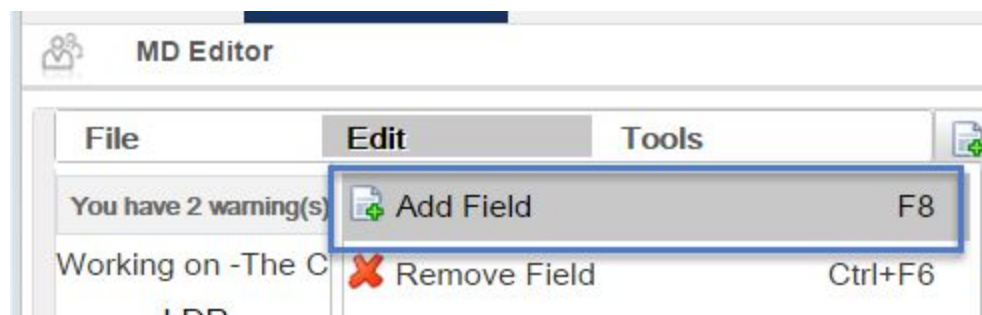
	ID	Library	Location	Call Number	Copy Id	Access Number	No. of Items	Available	PO Line	
1	2220564330002914	Reserves, Periodicals, and Microforms	Stored Periodical	HF1 .V62	-	-	29	29	-	Actions
2	2263122380002914	Reserves, Periodicals, and Microforms	Floor4 East Periodicals (RPM)	HF1 .V62	-	-	1	1	POL-256	Actions

[View](#)
[Edit](#)
[Relink](#)
[View items](#)
[Associate a PO Line](#)

Holdings record in Metadata Editor



Add 853 field.



With cursor in 853 field, Edit, Expand from template.

The screenshot shows the MD Editor application window. The title bar reads "MD Editor". The menu bar includes "File", "Edit", and "Tools". The "Edit" menu is open, displaying the following options:

- Add Field (F8)
- Remove Field (Ctrl+F6)
- Add Subfield (F9)
- Add Local Field (Ctrl+L)
- Add Alternate Graphic Representation
- Add Rule
- Enhance the Record (Ctrl+Alt+E)
- Expand from Template (Ctrl+E)**
- Generate Author Number (F4)
- Split Editor (F6)

The background shows a table with the following data:

You have 2 warning(s)	
Working on -The C	
LDR	
001	
004	
005	
852	0
853	
866	

Choose template.

Expand from Template

Choose Template: Serial prediction quarterly months

- Serial prediction combined chron semiannual
- Serial prediction daily
- Serial prediction daily 6 levels
- Serial prediction daily omits Sunday
- Serial prediction lacks a top level of enumeration and has continuous issue numbering
- Serial prediction monthly combined using 853
- Serial prediction monthly omits
- Serial prediction monthly regular
- Serial prediction quarterly combine
- Serial prediction quarterly months**
- Serial prediction quarterly seasons

853 \$a v. \$b no. \$u 4 \$v r \$i (year) \$j (month) \$w q \$8 1

(You may have to manually input the first level of enumeration, "v." in 853 \$a. For the templates I tested, 853 \$a was blank.)

Tools, Marc21 Holdings, Next predicted item's information

The screenshot shows the MD Editor interface. The 'Tools' menu is open, displaying various options. The 'MARC21 Holdings' option is highlighted, and its sub-menu is also open, showing 'Next predicted Item's information' highlighted with a blue border. The background shows a table of MARC records.

Field	Value
LDR	00511cx##a22
001	h2357693-01c
004	b15176381-01
005	20170227064
852	0 \$b RPM \$c
853	\$a v. \$b no.
590	\$a A quarter

Tools Menu:

- Search External Resources
- View Versions
- View versions of original record
- Validate **Ctrl+U**
- Validate in Network Zone
- Browse Shelf Listing **Alt+C**
- Browse Bib Headings
- View Notes
- View Collections
- Release All Records for User
- MARC Bibliographic
- MARC21 Holdings**
- Dublin Core
- Set Management Tags

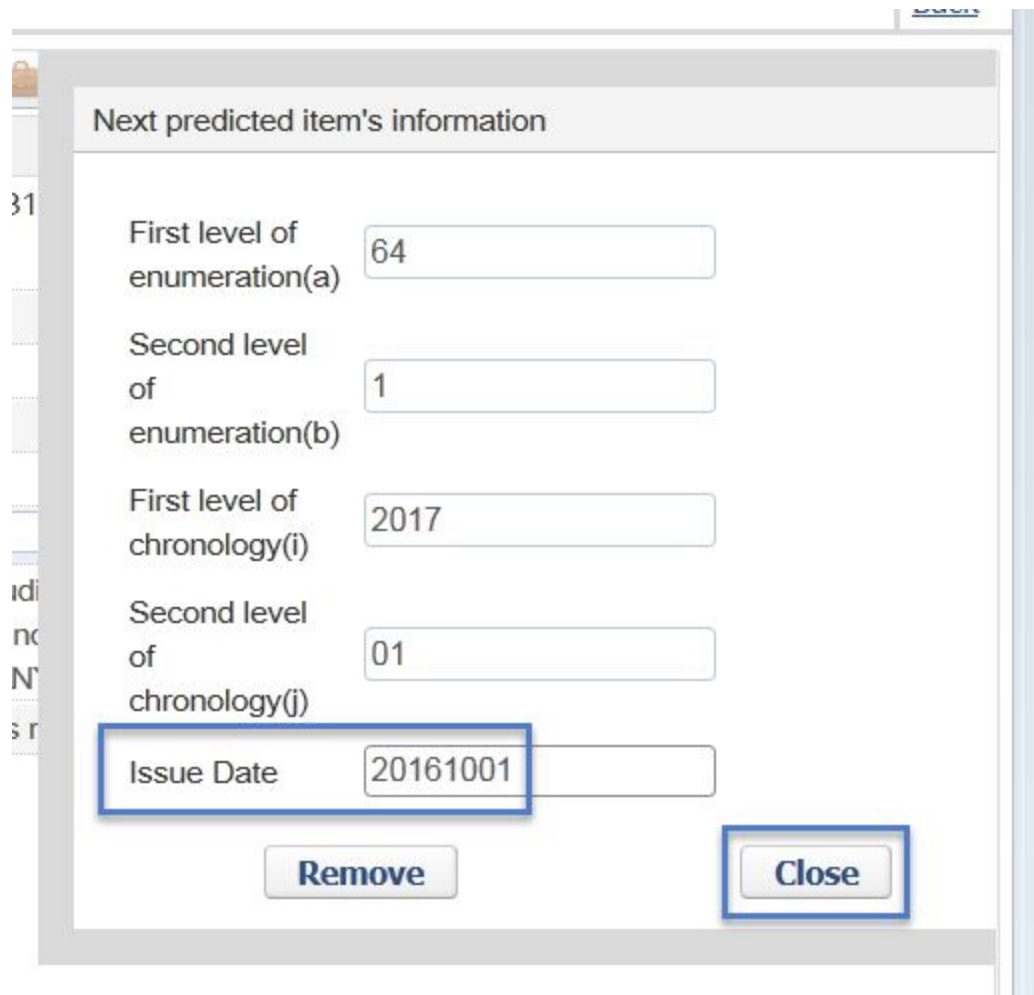
MARC21 Holdings Sub-menu:

- Add another holding **Ctrl+Alt+H**
- Add Item **Alt+I**
- Duplicate holding
- View bibliographic record **Ctrl+Alt+B**
- Update from Bibliographic **Alt+U**
- Relink to a different bibliographic record
- Generate Accession Number
- Next predicted Item's information **F3****
- Open predicted items
- View Inventory **Ctrl+I**

Next anticipated issue: v.64 no.1 (2017 Jan)

Note: Issue date is formatted yyyyymmdd.

Issue date = (expected receipt date from PO line) - (subscription interval from PO line)
10/01/2016 = 01/01/2017 - 90 days



The image shows a software dialog box titled "Next predicted item's information". It contains several input fields and two buttons. The fields are:

- First level of enumeration(a): 64
- Second level of enumeration(b): 1
- First level of chronology(i): 2017
- Second level of chronology(j): 01
- Issue Date: 20161001

At the bottom of the dialog box, there are two buttons: "Remove" and "Close". The "Issue Date" field and the "Close" button are highlighted with blue boxes.

Tools, Marc21 Holdings, Open predicted items

The screenshot shows the MD Editor interface. The 'Tools' menu is open, displaying various options. The 'MARC21 Holdings' option is highlighted, and its sub-menu is also open, with 'Open predicted items' highlighted. The background shows a MARC record with fields like LDR, 001, 004, 005, 852, 853, and 590.

MD Editor

File Edit Tools

You have 2 warning(s) in your record - Draft a

Working on -The Career developme (2

LDR	00511cx##a22
001	h2357693-01c
004	b15176381-01
005	20170227064
852 0	\$\$b RPM \$\$c
853	\$\$a v. \$\$b no
590	\$\$a A quarterl

- Search External Resources
- View Versions
- View versions of original record
- Validate Ctrl+U
- Validate in Network Zone
- Browse Shelf Listing Alt+C
- Browse Bib Headings
- View Notes
- View Collections
- Release All Records for User
- MARC Bibliographic
 - MARC21 Holdings**
 - Dublin Core
 - Set Management Tags

- Add another holding Ctrl+Alt+H
- Add Item Alt+I
- Duplicate holding
- View bibliographic record Ctrl+Alt+B
- Update from Bibliographic Alt+U
- Relink to a different bibliographic record
- Generate Accession Number
- Next predicted Item's information F3
- Open predicted items**
- View Inventory Ctrl+I

4
5
2
3
6
0

Predicted Items			
	Description	Status	Expected Arrival Date
1	v.64:no.1(2017:Jan.)	Item not in place	2016-12-30
2	v.64:no.2(2017:Apr.)	Item not in place	2017-04-01
3	v.64:no.3(2017:July)	Item not in place	2017-06-30
4	v.64:no.4(2017:Oct.)	Item not in place	2017-09-29

Discard Save

Expected arrival date = Issue date + (subscription interval from PO line)

12/30/2016 = 10/01/2016 + 90 days

List of items under RPM/prr holdings record

(includes items created using prediction patterns, status: item not in place, process type: acquisitions)

List of Items Back												
Resource description The Career development quarterly. National Career Development Association Alexandria, VA : Vol. 35, no. 1 ([Sept. 1986])-[0889-4019]												
Location Reserves, Periodicals, and Microforms: Floor4 East View all holdings Periodicals (RPM): HF1 .V62												
Sort routine Library/Location												
Status All Find : <input type="text"/> in : Call number Go												
Add Item Bind Items Change Holdings Open Predicted Items 1 - 5 of 5 Records Columns Tools												
Withdraw items Relink to another Bib												
	<input type="checkbox"/>	Barcode	Library	Location	Call Number	Description	Temporary Location	Status	Process type	Access Number	Receiving date	Actions
1	<input type="checkbox"/>	30700111585989	Reserves, Periodicals, and Microforms	Floor4 East Periodicals (RPM)	HF1 .V62	current print issues	No	Item in place	-	-	05/03/2013	Actions
2	<input type="checkbox"/>	-	Reserves, Periodicals, and Microforms	Floor4 East Periodicals (RPM)	HF1 .V62	v.64:no.4(2...	No	Item not in place	Acquisition	-	-	Actions
3	<input type="checkbox"/>	-	Reserves, Periodicals, and Microforms	Floor4 East Periodicals (RPM)	HF1 .V62	v.64:no.3(2...	No	Item not in place	Acquisition	-	-	Actions
4	<input type="checkbox"/>	-	Reserves, Periodicals, and Microforms	Floor4 East Periodicals (RPM)	HF1 .V62	v.64:no.2(2...	No	Item not in place	Acquisition	-	-	Actions
5	<input type="checkbox"/>	-	Reserves, Periodicals, and Microforms	Floor4 East Periodicals (RPM)	HF1 .V62	v.64:no.1(2...	No	Item not in place	Acquisition	-	-	Actions

Prediction patterns will create items for 1 year of issues (regardless of frequency). To create items for an additional year,

Open predicted items

The screenshot shows a library catalog interface titled "List of Items". It displays a resource description: "The Career development quarterly. National Career Development Association Alexandria, VA : Vol. 35, no. 1 ([Sept. 1986])-[0889-4019]". The location is "Reserves, Periodicals, and Microforms: Floor4 East Periodicals (RPM): HF1 .V62". There is a "View all holdings" link. Below the description, there is a "Sort routine" dropdown set to "Library/Location". A "Status" dropdown is set to "All". A "Find:" search box is present. A row of action buttons includes "Add Item", "Bind Items", "Change Holdings", "Open Predicted Items" (highlighted with a blue box), "Withdraw items", and "Relink to another Bib". The text "1 - 5 of 5 Records" is visible on the right. The bottom of the interface shows a table header with columns for "Call", "Temp", and "Access".

New UI: Actions, Open Predicted Items

This close-up shows the "Actions" dropdown menu in the new UI. The menu is open, displaying three options: "Add Item", "Bind Items", and "Open Predicted Items". The "Open Predicted Items" option is highlighted in yellow. Above the menu, the "Sort routine" dropdown is set to "Library/Location" and the "Change Holdings" button is visible. Below the menu, the "Description" and "Status" column headers are visible.


Predicted Items

Holdings Information

Library Reserves, Periodicals, and Microforms

Location RPMpr

Call Number HF1 .V62

Columns  **Tools**

Description	Status	Expected Arrival Date
1 v.65:no.1(2018:Jan.)	Item not in place	12/30/2017
2 v.65:no.2(2018:Apr.)	Item not in place	04/01/2018
3 v.65:no.3(2018:July)	Item not in place	06/30/2018
4 v.65:no.4(2018:Oct.)	Item not in place	09/29/2018

Discard **Save Items**

The [description template used for prediction patterns cannot be modified](#), according to the Alma-L list serv.

So we are stuck with v.65:no.1(2018:Jan.)
 Note the colons (:) between the levels of enumeration and chronology.

We may want to align our description template in resource management to this format. Currently our description template is v.65 no.1(2018 01).

3. Receiving issues created by a prediction pattern:

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_\(English\)/Resource_Management/050Inventory/040Managing_Physical_Resources#Setting_Up_Prediction_Patterns_to_Automatically_Create_Serial_Items](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Resource_Management/050Inventory/040Managing_Physical_Resources#Setting_Up_Prediction_Patterns_to_Automatically_Create_Serial_Items)

Search for “To process/manage receiving predicted items”.

Summary of receiving workflow:

1. Acquisitions, Receiving and invoicing, Receive.
2. Locate the periodical by title, ISSN or PO line number.


Receive New Material

Keep in Department Cataloging Shelf Ready

One Time Continuous

1 - 20 of 251 All

Status : All (Except Closed) Locate : Order Lines Filter orders with interested users : No

3.  , Manage items. (Do not use Receive as this will create additional item records.)

#	Item description	Status	Locations	# Ordered	Date Sent	Next Step	Rush	Notes	Receiving note	Interested Users
1	POL-355 AAPG bulletin., American Association of Petroleum Geologists, Vol. 58/1 (Jan. 1974)-, 0149-1423, ISSN	Waiting for Renewal	Reserves, Periodicals, and Microforms - Floor4 East Periodicals (1)	1	08/14/2017	-		✓	Print+onli... Technical P...	

Manage Items

Receive

In the Received Items List, it's helpful to filter by Receiving status: Not Received and Sort by the item description field.

Received Items List

AAPG bulletin., American Association of Petroleum Geologi...

Vendor/Account
EBSCO 0221/ Account -01

Order Line POL-355
Status Waiting for Renewal (201...

Order PO-4103
Order line type Physical - Subscription

PO line owner Oviatt Main

Sent date 08/14/2017

PO line Items

Bibliographic Information

1 - 4 of 4

Sort routine

Sort routine

Description

Receiving status: Not Received Location: All Clear all

4. From the list of predicted issues, select the issues that have been received and scan barcode.

Library	Location	Temp Loc	Date Receive	Modifie	Call Number	Alternative Call Number	Barcode	Description	Curre
1 <input checked="" type="checkbox"/>	Reserves, Periodicals, and Microforms	Stored Periodical	No	-	11/0...	AP1 .A76	-	<input type="button" value="Scan barcode"/>	v.73:no.4(2017:Winter) -

If the item does not have a barcode you can check the issue received and click on Save and Receive.

Received Items List

Save Back Save and Receive

AAPG bulletin., American Association of Petroleum Geologi...

Vendor/Account EBSCO 0221/ Account -01 Order Line POL-355 Order PO-4103
 Status Waiting for Renewal (201... Order line type Physical - Subscription
 PO line owner Oviatt Main Sent date 08/14/2017

Receiving note

Print+online. Technical POL-403 is for the online. gs8/16/17 Emailed Starla re: we need to renew this title. gs2/1/16 *Order is for print + online. Online only is for 2 years of rolling backfile (no perpetual access). 5/21/12dw

PO line Items Bibliographic Information

1 - 4 of 4 Sort routine

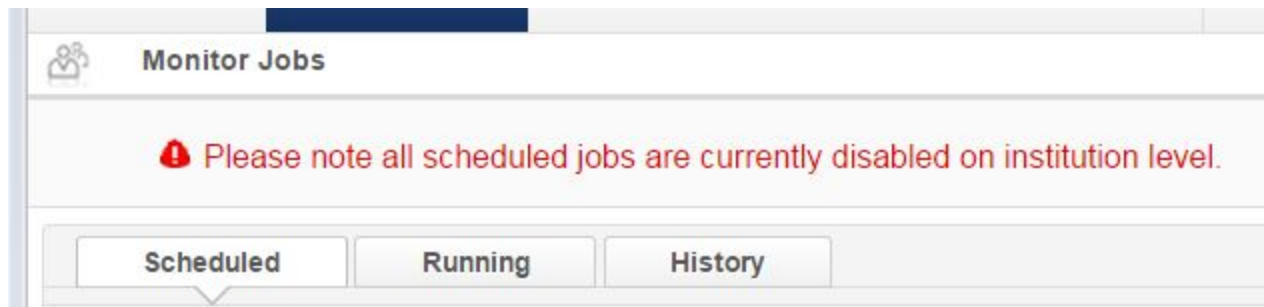
Receive New Items Analytics Issues Report

Receiving status: Not Received Location: All Clear all

Library	Location	Temp Loc	Date Receive	Modify	Call Number	Alternative Call Number	Barcode	Description	Current Step
1 <input checked="" type="checkbox"/> Reserves, Periodicals, and Microforms	Floor4 East Periodicals	No	-	10/1...	TN1 .A4	-	<input type="text"/>	v. 101,no. 6 (June 2017)	-

4. Claiming issues

In our testing environment, claims may not appear in the Claim task list (Alma, Acquisitions, Purchase order lines, Claim) because the job: PO Line - Claiming is not being run. See Alma, Administration, Manage jobs and sets, Monitor jobs, Scheduled tab.



Improvements to claiming for continuous PO lines (H2 2018-2019):

Claims to the vendor for the continuous type PO lines will be sent per issue.

The expected arrival date of the issue will change accordingly when the claim is sent utilizing the existing job "PO Line –Claiming".

The communications tab of the vendor will be enriched with additional claiming information.

See page 69 of [Alma Roadmap Highlights](#).






Weekly, some issues combined

Time (Oclc 1767509, issn 0040-781X)

Frequency: weekly (except two issues combined for one week in January, May, July and August)

PO Line (POL-265): attached to existing title, assign inventory manually,

Vendor info in POL-265

Vendor Information	
Material supplier *	<input type="text" value="zron/zron1"/>   
Claiming grace period (days)	<input type="text" value="14"/>
Or expected receipt date	<input type="text" value="01/01/2017"/>  
Zron fake vendor for testing (zron)/ testing acct (zron1)	
Expected receipt after ordering (days)	<input type="text" value="0"/>
Subscription interval	<input type="text" value="7"/>

Claiming grace period: 2 weeks

Expected receipt date (01/01/17 (pretending the current date is beginning of the year))

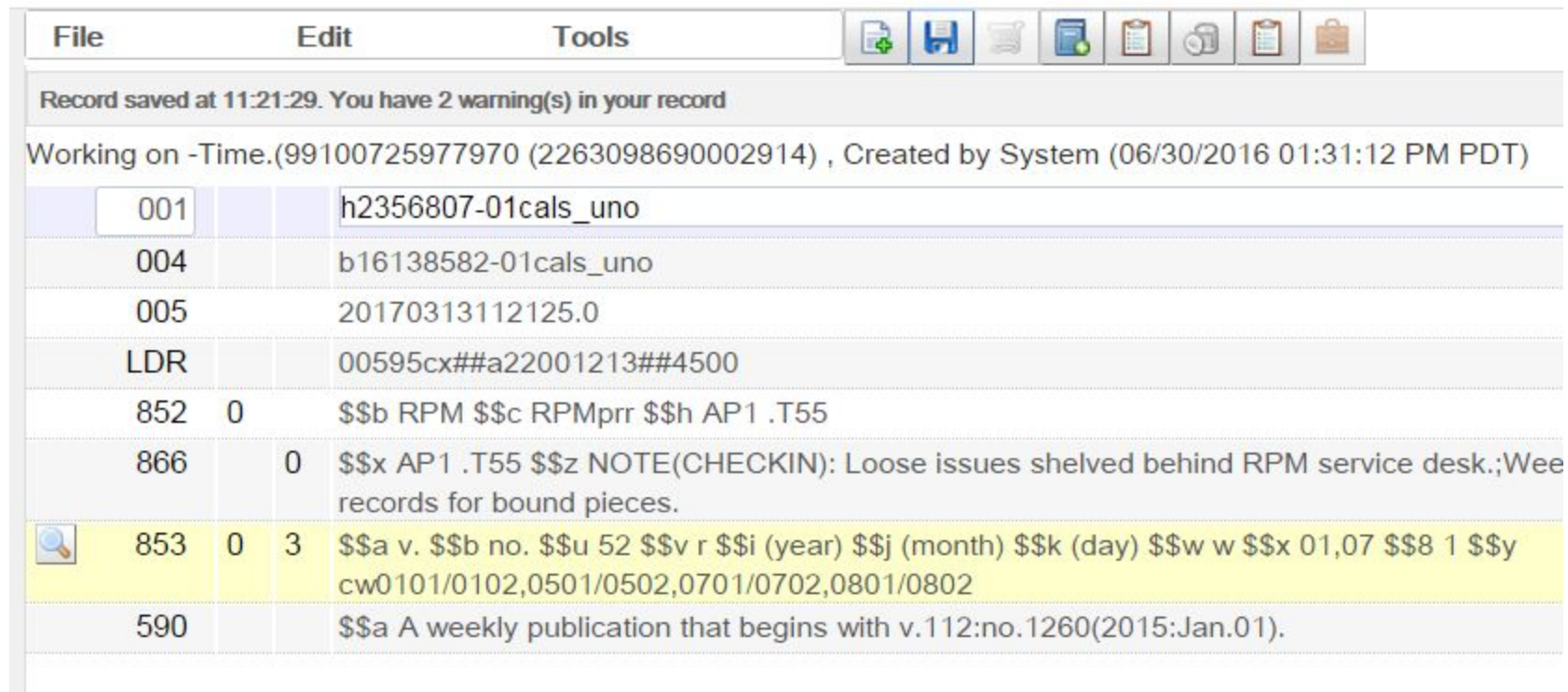
Subscription interval (7 days = weekly)


Linked PO line to holdings record

List of Holdings										Back	
Resource description Time. [Time Inc.], [New York.] : Volume 1- March 3, 1923- [0040-781X]											
Filter <input type="text" value="All"/>										Find : <input type="text"/>	in : Call number <input type="text"/> Go
Delete Holdings		Add new Holdings		1 - 4 of 4 Records			Columns <input type="text"/>	Tools			
	ID	Library	Location	Call Number	Copy Id	Access Number	No. of Items	Available	PO Line		
1	2225611290002914	Reserves, Periodicals, and Microforms	Stored Periodical	AP1 .T55	-	-	374	368	-	Actions	
2	2225611300002914	Reserves, Periodicals, and Microforms	Floor4 East Microfilm	AP1 .T55	-	-	0	0	-	Actions	
3	2225626660002914	Reserves, Periodicals, and Microforms	Stored Micro	AP1 .T55	-	-	8	8	-	Actions	
4	2263098690002914	Reserves, Periodicals, and Microforms	Floor4 East Periodicals (RPM)	AP1 .T55	-	-	2	2	POL-265	Actions	

Setup prediction patterns in holdings record using Metadata Editor (853 field)

See <http://www.loc.gov/marc/holdings/hd853855.html> for instructions on inputting 853 and its subfields



File	Edit	Tools			
Record saved at 11:21:29. You have 2 warning(s) in your record					
Working on -Time.(99100725977970 (2263098690002914) , Created by System (06/30/2016 01:31:12 PM PDT)					
001					h2356807-01cals_uno
004					b16138582-01cals_uno
005					20170313112125.0
LDR					00595cx##a22001213##4500
852	0				\$\$b RPM \$\$c RPMpr \$\$h AP1 .T55
866		0			\$\$x AP1 .T55 \$\$z NOTE(CHECKIN): Loose issues shelved behind RPM service desk.;Wee records for bound pieces.
	853	0	3		\$\$a v. \$\$b no. \$\$u 52 \$\$v r \$\$i (year) \$\$j (month) \$\$k (day) \$\$w w \$\$x 01,07 \$\$8 1 \$\$y cw0101/0102,0501/0502,0701/0702,0801/0802
	590				\$\$a A weekly publication that begins with v.112:no.1260(2015:Jan.01).

\$v r indicates that numbering restarts at the completion of a unit (i.e. At the start of each volume, the issue number begins at 1)

\$w w indicates this is a weekly publication

\$x 01,07 indicates the chronological point at which the highest level changes (i.e. For this publication the volume number increments in

January (01) and July (07))

Combined issues

\$y cw... indicates that weekly issues are combined (For example, \$y cw0101/0102 indicates that the January first and second week issues are combined into one issue.)

Next predicted item's information

First level of enumeration(a)	<input type="text" value="189"/>
Second level of enumeration(b)	<input type="text" value="1"/>
First level of chronology(i)	<input type="text" value="2017"/>
Second level of chronology(j)	<input type="text" value="01"/>
Third level of chronology(k)	<input type="text" value="09"/>
Issue Date	<input type="text" value="20170101"/>
Calendar change(x)	<input type="text" value="01,07"/>
Regularity pattern(y)	<input type="text" value="cw0101/0102,0501/0502,0"/>

Next predicted item's info

Next issue: v.189 no.1 (Jan 09 2017)

Issue date: Jan 1, 2017

Based on the predicted items, it looks like Alma isn't combining issues even when they are coded in 853 \$y. (The first and second issues of Jan, May, Jul and Aug should have been combined but they are not.) I don't know why this isn't working. However, Alma is correctly incrementing the volume number for the first issue in July. (v.189 > v.190)

	Description	Status	Expected Arrival Date
1	v.189:no.1(2017:Jan. 09)	Item not in place	2017-01-08
2	v.189:no.2(2017:Jan. 16)	Item not in place	2017-01-15
3	v.189:no.3(2017:Jan. 23)	Item not in place	2017-01-22
4	v.189:no.4(2017:Jan. 30)	Item not in place	2017-01-29
5	v.189:no.5(2017:Feb. 06)	Item not in place	2017-02-05
6	v.189:no.6(2017:Feb. 13)	Item not in place	2017-02-12
7	v.189:no.7(2017:Feb. 20)	Item not in place	2017-02-19
8	v.189:no.8(2017:Feb. 27)	Item not in place	2017-02-26
9	v.189:no.9(2017:Mar. 06)	Item not in place	2017-03-05
10	v.189:no.10(2017:Mar. 13)	Item not in place	2017-03-12
11	v.189:no.11(2017:Mar. 20)	Item not in place	2017-03-19
12	v.189:no.12(2017:Mar. 27)	Item not in place	2017-03-26
13	v.189:no.13(2017:Apr. 03)	Item not in place	2017-04-02
14	v.189:no.14(2017:Apr. 10)	Item not in place	2017-04-09
15	v.189:no.15(2017:Apr. 17)	Item not in place	2017-04-16
16	v.189:no.16(2017:Apr. 24)	Item not in place	2017-04-23
17	v.189:no.17(2017:May 01)	Item not in place	2017-04-30

ais_ufio

Predicted Items

17	v.189:no.17(2017:May 01)	Item not in place	2017-04-30
18	v.189:no.18(2017:May 08)	Item not in place	2017-05-07
19	v.189:no.19(2017:May 15)	Item not in place	2017-05-14
20	v.189:no.20(2017:May 22)	Item not in place	2017-05-21
21	v.189:no.21(2017:May 29)	Item not in place	2017-05-28
22	v.189:no.22(2017:June 05)	Item not in place	2017-06-04
23	v.189:no.23(2017:June 12)	Item not in place	2017-06-11
24	v.189:no.24(2017:June 19)	Item not in place	2017-06-18
25	v.189:no.25(2017:June 26)	Item not in place	2017-06-25
26	v.190:no.1(2017:July 03)	Item not in place	2017-07-02
27	v.190:no.2(2017:July 10)	Item not in place	2017-07-09
28	v.190:no.3(2017:July 17)	Item not in place	2017-07-16
29	v.190:no.4(2017:July 24)	Item not in place	2017-07-23
30	v.190:no.5(2017:July 31)	Item not in place	2017-07-30
31	v.190:no.6(2017:Aug. 07)	Item not in place	2017-08-06
32	v.190:no.7(2017:Aug. 14)	Item not in place	2017-08-13
33	v.190:no.8(2017:Aug. 21)	Item not in place	2017-08-20
34	v.190:no.9(2017:Aug. 28)	Item not in place	2017-08-27
35	v.190:no.10(2017:Sept. 04)	Item not in place	2017-09-03


Discard

Save

This might not be a problem because based on the past publication pattern of Time, the combining of issues doesn't always follow a regular pattern anyway. The pcc bib record indicates that two weekly issues are combined into one issue in the months of Jan, May, July and Aug. For 2016, there were issues combined in Dec 2015/Jan 2016, May 2016, and July 2016 but not Aug 2016.

We may just have to create a regular, weekly prediction pattern. When we receive a combined issue, we can update the enumeration and chronology for the combined issue and withdraw the extraneous item record.

Combined issues (monthly)

001		h2357909-01cals_uno
004		b15265948-01cals_uno
005		20170313124357.0
LDR		00483cx##a22001213##4500
852	0	\$\$b RPM \$\$c RPMpr \$h L1 .E373
	853	\$\$a v. \$\$b no. \$\$u 9 \$\$v r \$\$i (year) \$\$j (month) \$\$w m \$\$x 09 \$\$y cm05/06,07/08 \$\$8 1

\$y: (May/June and Jul/Aug are combined issues.)

Predicted Items			
	Description	Status	Expected Arrival Date
1	v.82:no.5(2017:Jan.)	Item not in place	2017-01-31
2	v.82:no.6(2017:Feb.)	Item not in place	2017-03-03
3	v.82:no.7(2017:Mar.)	Item not in place	2017-03-31
4	v.82:no.8(2017:Apr.)	Item not in place	2017-05-01
5	v.82:no.9(2017:May/June)	Item not in place	2017-05-31
6	v.82:no.10(2017:July/Aug.)	Item not in place	2017-07-31
7	v.83:no.1(2017:Sept.)	Item not in place	2017-10-01
8	v.83:no.2(2017:Oct.)	Item not in place	2017-10-31
9	v.83:no.3(2017:Nov.)	Item not in place	2017-12-01
10	v.83:no.4(2017:Dec.)	Item not in place	2017-12-31





Combining monthly issues seems to work okay.

Monthly, some issues omitted

Education digest (oclc 1567544, issn 0013-127x)

Frequency: Monthly (Sept.-May)

Vendor info POL-267

Vendor Information	
Material supplier *	<input type="text" value="zron/zron1"/>  
Claiming grace period (days)	<input type="text" value="30"/>
Or expected receipt date	<input type="text" value="01/01/2017"/>  
Expected receipt after ordering (days)	<input type="text"/>
Subscription interval	<input type="text" value="30"/>


[Zron fake vendor for testing \(zron\)/ testing acct \(zron1\)](#)

Linked PO line to holdings record

List of Holdings [Back](#)

Resource description [The education digest. Education digest \(Ann Arbor, Mich.\) Education Digest Ann Arbor, Mich. : Vol. 1, no. 1 \(Nov. 1935\)- \[0013-127X\]](#)

Filter Find : in :


1 - 3 of 3 Records Columns 

	ID	Library	Location	Call Number	Copy Id	Access Number	No. of Items	Available	PO Line	Actions
1	2226175080002914	Reserves, Periodicals, and Microforms	Stored Periodical	L1 .E373	-	-	68	68	-	<input type="button" value="Actions"/>
2	2226175110002914	Reserves, Periodicals, and Microforms	Stored Micro	L1 .E373	-	-	2	2	-	<input type="button" value="Actions"/>
3	2263098740002914	Reserves, Periodicals, and Microforms	Floor4 East Periodicals (RPM)	L1 .E373	-	-	1	1	POL-267	<input type="button" value="Actions"/>

In Metadata editor, editing holdings record and used template: Serials prediction monthly omits

Record saved at 12:17:37. You have 4 warning(s) in your record

Working on -The education digest (2263098740002914) , Created by System (06/30/2016 01:31:12 PM PDT)

LDR		00477cx##a22001213##4500
001		h2357909-01cals_uno
004		b15265948-01cals_uno
005		20170313121736.0
852	0	\$\$b RPM \$\$c RPMpr \$h L1 .E373
	853	\$\$a v. \$\$b no. \$\$u 9 \$\$v r \$\$i (year) \$\$j (month) \$\$w m \$\$x 09 \$\$y om06,07,08 \$\$8 1
	866	0 \$\$x L1 .E373 \$\$z NOTE(CHECKIN): 9 ISS/V.
	590	\$\$a A monthly publication that begins with v.1:no.1(2015:Jan.) and regularly omits public

- \$w m Publication frequency is monthly.
- \$x 09 In September the volume number is incremented.
- Omitted issues
- \$y om06,07,08 The months of June, July, and Aug are omitted.

Next predicted item's information:
(Pretending that the current date is 01/01/2017)
v.82 no.5 (Jan 2017) issue date: 01/01/2017

Next predicted item's information

Issue Date	<input type="text" value="20170101"/>
First level of enumeration(a)	<input type="text" value="82"/>
Second level of enumeration(b)	<input type="text" value="5"/>
First level of chronology(i)	<input type="text" value="2017"/>
Second level of chronology(j)	<input type="text" value="01"/>
Calendar change(x)	<input type="text" value="09"/>
Regularity pattern(y)	<input type="text" value="om06,07,08"/>

Predicted items

0047/cy##a22001213##4500

Predicted Items

	Description	Status	Expected Arrival Date
1	v.82:no.5(2017:Jan.)	Item not in place	2017-01-31
2	v.82:no.6(2017:Feb.)	Item not in place	2017-03-03
3	v.82:no.7(2017:Mar.)	Item not in place	2017-03-31
4	v.82:no.8(2017:Apr.)	Item not in place	2017-05-01
5	v.82:no.9(2017:May)	Item not in place	2017-05-31
6	v.83:no.1(2017:Sept.)	Item not in place	2017-10-01
7	v.83:no.2(2017:Oct.)	Item not in place	2017-10-31
8	v.83:no.3(2017:Nov.)	Item not in place	2017-12-01
9	v.83:no.4(2017:Dec.)	Item not in place	2017-12-31

Discard Save

Alerts Linked Data

Note: Issues for June, July and Aug. are correctly omitted from prediction pattern. Also, volume numbering is correctly incremented in the Sept issue.

Summary holdings statement (863/866 field)

Creating summary holdings (866) from holdings record (Exlibris presentation)

https://knowledge.exlibrisgroup.com/@api/deki/files/42150/Serials_-_Automation_tasks_for_summary_holdings.pptx

Configuration: Resource management, Resource configuration menu.

Cataloging, Metadata configuration, Marc21 Holding Profile,

Normalization processes: Marc21 Holding normalize on save

Profile Details

Profile: MARC21 Holding
Type: Holding

Family: MA
Usage: HC

Fields | **Normalization Processes** | Validation Processes | Validation Exception Profile List

Add Process

	Active	Name	Description
1	✓	Marc21 Holding normalize from BIB	Normalize Marc 21 Holding from BIB
2	✓	Marc21 Holding normalize on save	Normalize Marc 21 Holding while saving
3	✓	Marc21 Holding Re-sequence And Clear empty fields	Marc21 Holding Re-sequence And Clear er
4	✓	Update PRR for RPM	Update library and location for prr erroneou
5	✓	Update RBRDK for RPM	Fix incorrectly migrated holdings records wi
6	✓	Update RBRF for RPM	Update RBRF location code to RPMRBRF

Within the process, under Task list you can add two processes, MARC21 Expand Holding By 863/4/5 Task and MARC21 Expand Holding By 866/7/8 Task.

Process Details Cancel Save

General Information Task List Task Parameters

Business Entity Holding Type Marc 21 holding normalization
Name Marc21 Holding normalize on save

Processes Selected Columns Tools

	Name	Description	
1	852 field normalization	Fill subfields according to first indicator	Remove
2	marc21HoldingClearEmptyFieldsTask	Delete empty fields	Remove

Process List Pool Columns Tools

	Name	Description	
1	852 field normalization	Fill subfields according to first indicator	<input type="checkbox"/>
2	MarcDroolNormalization	Marc Drool Normalization	<input type="checkbox"/>
3	marc21HoldingClearEmptyFieldsTask	Delete empty fields	<input type="checkbox"/>
4	marc21HoldingResequeneceTask	Re-sequence fields	<input type="checkbox"/>
5	MARC21 Expand Holding By 866/7/8 Task	Create 866/867/868 Textual Holdings fields	<input checked="" type="checkbox"/>
6	MARC21 Expand Holding By 863/4/5 Task	Create 863/864/865 Summary statement Holdings fields	<input checked="" type="checkbox"/>

Add to Selection

Process Details

General Information | **Task List** | Task Parameters

Business Entity Holding Type Marc 21 holding normalization
 Name Marc21 Holding normalize on save

Processes Selected

		Name	Description
1	▼	852 field normalization	Fill subfields according to first indicator
2	▲ ▼	MARC21 Expand Holding By 863/4/5 Task	Create 863/864/865 Summary statement Holdings fields
3	▲ ▼	MARC21 Expand Holding By 866/7/8 Task	Create 866/867/868 Textual Holdings fields
4	▲	marc21HoldingClearEmptyFieldsTask	Delete empty fields

These two processes should add a 863 and 866 field in the holdings record when you save it.

~~A MarcDroolNormalization (i.e. normalization rule) can delete any existing 866 field(s) and re-generates it based on the most recent data in the 863 field. (See slides 6,32-34.)~~

Even with prediction patterns established, I couldn't get the 863 field to automatically generate. (Probably because predicted issues have not been received yet. Also, existing issues migrated from Millennium lack the enumeration and chronology designation for each issue that is needed to generate the 863 field. (Enum/chron from Millennium migrated as a single data field and is mapped to the description field in Alma.))

Millennium's item record view

c	099	HF1 .V62
b		30700105504657
v		v.35 Sep-Jun 1986-87

Alma view of same item record (Note: Enum and chron fields are blank.)

Barcode	30700105504657	Copy ID	1
Material type	Issue	Item policy	Standard
Provenance		Is magnetic	No
PO Line		Issue date	
Receiving date	11/08/2002	Expected receiving date	
Enumeration A		Enumeration B	
Chronology I		Chronology J	
Description	v.35 Sep-Jun 1986-87	Generate	

So I manually input an 863 field and when I saved the holdings record the 866 field was automatically generated.

File	Edit	Tools				
Record saved at 08:04:56. You have 2 warning(s) in your record						
Working on -The Career developme (2263122380002914) , Created by System (06/30/2016)						
LDR			00468cx##a22001333##4500			
001			h2357693-01cals_uno			
004			b15176381-01cals_uno			
005			20170321080456.0			
852	0		\$\$b RPM \$\$c RPMpr \$h HF1 .V62			
853	3	1	\$\$a v. \$\$b no. \$\$u 4 \$\$v r \$\$i (year) \$\$j (month) \$\$w q \$\$8 1			
863	3	0	\$\$a 64- \$\$b 1- \$\$i 2017- \$\$j 01- \$\$8 1.1			
590			\$\$a A quarterly publication that begins with v.1:no.1(2015:Jan.) and			
866	4	1	\$\$a v.64:no.1(2017:Jan.)- \$\$8 1.1			

(Can't test Primo display of 866 field because in testing environment Alma to Primo updates are infrequent.)

In Primo the Get It tab should look something like the following.


Location:	.Eugene McDermott Library		
Library Has:	Vol.2-Vol.3		
Year	All	Volume	All

Other libraries' experiences with prediction patterns (from the Alma list serv)

1. U. Conn. Law library, yes use, 1300 titles, time consuming setup (2 staff, 15-20 hours/week for 3 months!), includes best practices
<https://listserv.nd.edu/cgi-bin/wa?A2=ALMA-L;e8d987f4.1606>
2. Univ. Sheffield, no use, 1000+ titles, prediction patterns: too time-consuming & labor-intensive
Claims list problems: items incorrectly showing up, [titles \(not issues\) appear in list](#) (may be fixed Q3 2017?), claims list based on PO
line (subscription interval, expected receipt date, and claiming grace period)
print serials management: afterthought, not a priority for Exlibris
<https://listserv.nd.edu/cgi-bin/wa?A2=ALMA-L;4353f2e4.1606>
<https://listserv.nd.edu/cgi-bin/wa?A2=ALMA-L;46c4a4eb.1606>
<https://listserv.nd.edu/cgi-bin/wa?A2=ALMA-L;f18cd0a2.1604>
3. Portland Community College, yes use, but also use analytics widgets to find late issues, subpar functionality with periodicals
<https://listserv.nd.edu/cgi-bin/wa?A2=ALMA-L;955f2fb8.1606>

Changes in prediction patterns

The following testing was done in the Sandbox to test how an institution might handle changes to prediction patterns (such as changes in frequency, and/or numbering). I created a fake bib record for Administrative law review in the Sandbox, created and linked a PO line to it and set up a quarterly prediction pattern in the holdings record.

852	0		\$\$\$b MAIN \$\$\$c reference \$\$\$h K1 \$\$\$i .D56	
	853	3	1	\$\$\$a v. \$\$\$b no. \$\$\$u 4 \$\$\$v r \$\$\$i (year) \$\$\$j (season) \$\$\$x 21 \$\$\$w q \$\$\$8 1 \$\$\$n Quarterly

\$\$\$a v. \$\$\$b no. \$\$\$u 4 \$\$\$v r \$\$\$i (year) \$\$\$j (season) \$\$\$w q \$\$\$x 21 \$\$\$8 1 \$\$\$n Quarterly
(\$n is optional. I only added to easily distinguish between 853 fields)

Next issue: v.69 no.1 (2017 Spring) issue date 20170101 (Pretending that this title begins the new year with the Spring issue)

Items created by prediction patterns:



List of Items

Resource description [Administrative law review : \[mbj testing prediction patterns\] Administrative Law Section American Bar Association \[Chicago\] : Vol. 13 \(fall 1960\)-](#)

Location [Main Library: Reference: K1 .D56](#)

[View all holdings](#)

Sort routine YEARS

Status All

Find :

1 - 4 of 4

[Add Item](#) [Bind Items](#) [Change Holdings](#) [Open Predicted Items](#)

[Withdraw items](#) [Relink to another Bib](#)

	<input type="checkbox"/>	Library	Location	Call Number	Description	Status	Process type
1	<input type="checkbox"/>	Main Library	Reference	K1 .D56	v.69:no.1(2017:Spring)	Item not in place	Acquisition
2	<input type="checkbox"/>	Main Library	Reference	K1 .D56	v.69:no.2(2017:Summer)	Item not in place	Acquisition
3	<input type="checkbox"/>	Main Library	Reference	K1 .D56	v.69:no.3(2017:Autumn)	Item not in place	Acquisition
4	<input type="checkbox"/>	Main Library	Reference	K1 .D56	v.69:no.4(2017:Winter)	Item not in place	Acquisition

If I made a mistake in creating the predicted items, I can withdraw them..

List of Items

Resource description [Administrative law review : \[mbj testing prediction patterns\] Administrative Law Section American Bar Association \[Chicago\] : Vol. 13 \(fall 1960\)-](#)

Location [Main Library: Reference: K1 .D56](#)

[View all holdings](#)

Sort routine: YEARS

Status: All

Find:

[Add Item](#)
[Bind Items](#)
[Change Holdings](#)
[Open Predicted Items](#)
1 - 4 of 4 Rec

[Withdraw items](#)
[Relink to another Bib](#)

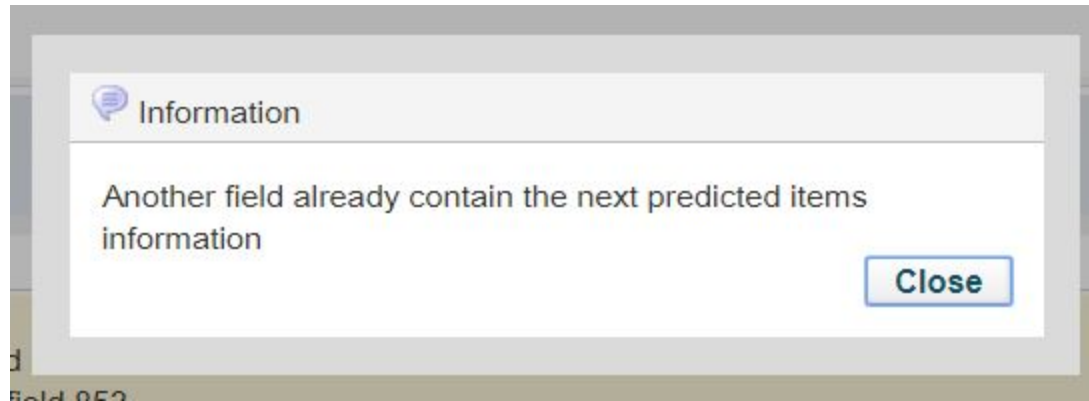
	<input checked="" type="checkbox"/>	Library	Location	Call Number	Description	Status	Process type
1	<input checked="" type="checkbox"/>	Main Library	Reference	K1 .D56	v.69:no.1(2017:Spring)	Item not in place	Acquisition
2	<input checked="" type="checkbox"/>	Main Library	Reference	K1 .D56	v.69:no.2(2017:Summer)	Item not in place	Acquisition
3	<input checked="" type="checkbox"/>	Main Library	Reference	K1 .D56	v.69:no.3(2017:Autumn)	Item not in place	Acquisition
4	<input checked="" type="checkbox"/>	Main Library	Reference	K1 .D56	v.69:no.4(2017:Winter)	Item not in place	Acquisition

Let's pretend that beginning in 2018, this periodical will change to a monthly publication frequency and use whole numbering.

853	3	1	\$\$a v. \$\$b no. \$\$u 4 \$\$v r \$\$i (year) \$\$j (season) \$\$w q \$\$x 21 \$\$8 1 \$\$n Quarterly
853	3	1	\$\$a no. \$\$u 12 \$\$v c \$\$i (year) \$\$j (season) \$\$w m \$\$x 01 \$\$8 2 \$\$n Monthly

\$\$a no. \$\$u 12 \$\$v c \$\$i (year) \$\$j (season) \$\$w m \$\$x 01 \$\$8 2 \$\$n Monthly
 (\$n is optional. I only added to easily distinguish between 853 fields)

If I try to enter the next predicted item's information (F3) for the second 853 field I get an error message:



Which seems to indicate that I should remove the next predicted item's info from the first 853 (\$8 1) field.

Next predicted item's information

20

First level of enumeration(a)

Second level of enumeration(b)

First level of chronology(i)

Second level of chronology(j)

Issue Date

Calendar change(x)

Pattern note(n)

Remove

And when I do, I can add the next predicted item info for the second 853 (\$8 2) field. (I made up the first level of enumeration as 243.)

Next predicted item's information

First level of enumeration(a)

First level of chronology(i)

Second level of chronology(j)

Calendar change(x)

Pattern note(n)

Issue Date

Remove

Close

Predicted Items

	Description	Status	Expected Arrival Date
1	no.243(2018:Jan.)	Item not in place	2018-01-31
2	no.244(2018:Feb.)	Item not in place	2018-03-03
3	no.245(2018:Mar.)	Item not in place	2018-03-31
4	no.246(2018:Apr.)	Item not in place	2018-05-01
5	no.247(2018:May)	Item not in place	2018-05-31
6	no.248(2018:June)	Item not in place	2018-07-01
7	no.249(2018:July)	Item not in place	2018-07-31
8	no.250(2018:Aug.)	Item not in place	2018-08-31
9	no.251(2018:Sept.)	Item not in place	2018-10-01
10	no.252(2018:Oct.)	Item not in place	2018-10-31
11	no.253(2018:Nov.)	Item not in place	2018-12-01
12	no.254(2018:Dec.)	Item not in place	2018-12-31

In Alma, all the predicted items (including 2017 and 2018) appear under the holdings record.

List of Items

Resource description [Administrative law review : \[mbj testing prediction patterns\] Administrative Law Section American Bar Association \[Chicago\] : Vol. 13 \(fall](#)

Location [Main Library: Reference: K1 .D56](#)

[View all holdings](#)

Sort routine

Status

[Add Item](#) [Bind Items](#) [Change Holdings](#) [Open Predicted Items](#) [Withdraw items](#)

[Relink to another Bib](#)

	<input type="checkbox"/>	Library	Location	Call Number	Description
1	<input type="checkbox"/>	Main Library	Reference	K1 .D56	no.243(2018:Jan.)
2	<input type="checkbox"/>	Main Library	Reference	K1 .D56	no.244(2018:Feb.)
3	<input type="checkbox"/>	Main Library	Reference	K1 .D56	no.245(2018:Mar.)
4	<input type="checkbox"/>	Main Library	Reference	K1 .D56	no.246(2018:Apr.)
5	<input type="checkbox"/>	Main Library	Reference	K1 .D56	no.247(2018:May)
6	<input type="checkbox"/>	Main Library	Reference	K1 .D56	no.248(2018:June)
7	<input type="checkbox"/>	Main Library	Reference	K1 .D56	no.249(2018:July)
8	<input type="checkbox"/>	Main Library	Reference	K1 .D56	no.250(2018:Aug.)
9	<input type="checkbox"/>	Main Library	Reference	K1 .D56	no.251(2018:Sept.)
10	<input type="checkbox"/>	Main Library	Reference	K1 .D56	no.252(2018:Oct.)
11	<input type="checkbox"/>	Main Library	Reference	K1 .D56	no.253(2018:Nov.)
12	<input type="checkbox"/>	Main Library	Reference	K1 .D56	no.254(2018:Dec.)
13	<input type="checkbox"/>	Main Library	Reference	K1 .D56	v.69:no.1(2017:Spring)
14	<input type="checkbox"/>	Main Library	Reference	K1 .D56	v.69:no.2(2017:Summer)
15	<input type="checkbox"/>	Main Library	Reference	K1 .D56	v.69:no.3(2017:Autumn)
16	<input type="checkbox"/>	Main Library	Reference	K1 .D56	v.69:no.4(2017:Winter)

(The item records are sorted alphabetically by the description field. Therefore “no.” appears before “v.”.)

If I click on “Open Predicted Items”

The screenshot shows the 'List of Items' interface in Alma. At the top, there is a header 'List of Items' with a group icon. Below this, the 'Resource description' is 'Administrative law review : [mbj testing prediction patterns] Admi' and the 'Location' is 'Main Library: Reference: K1 .D56'. A link 'View all holdings' is visible. The 'Sort routine' is set to 'Description'. The 'Status' is 'All'. At the bottom, there is a row of buttons: 'Add Item', 'Bind Items', 'Change Holdings', 'Open Predicted Items' (highlighted in yellow), and 'Withdraw items'. Below this row is a button 'Relink to another Bib'.

Alma will create additional items based on the prediction pattern currently in effect (in this example, the monthly, whole numbering pattern (853 \$8 2))

Predicted Items

Holdings Information

Library Main Library**Location** reference**Call Number** K1 .D56

Columns ▼

 **Tools**

Description	Status	Expected Arrival Date
1 no.255(2019:Jan.)	Item not in place	01/31/2019
2 no.256(2019:Feb.)	Item not in place	03/03/2019
3 no.257(2019:Mar.)	Item not in place	03/31/2019
4 no.258(2019:Apr.)	Item not in place	05/01/2019
5 no.259(2019:May)	Item not in place	05/31/2019
6 no.260(2019:June)	Item not in place	07/01/2019
7 no.261(2019:July)	Item not in place	07/31/2019
8 no.262(2019:Aug.)	Item not in place	08/31/2019
9 no.263(2019:Sept.)	Item not in place	10/01/2019
1 no.264(2019:Oct.)	Item not in place	10/31/2019
1 no.265(2019:Nov.)	Item not in place	12/01/2019
1 no.266(2019:Dec.)	Item not in place	12/31/2019

863/866 summary holdings statement

If I have two 863 fields and save the holdings record,

863	3	0	\$\$\$a 13-69 \$\$\$i 1960-2017 \$\$\$w n \$\$\$8 1.1
863	3	0	\$\$\$a 243- \$\$\$i 2018- \$\$\$8 2.1

Alma can automatically generate 866 fields for each 863 field. See [section above](#).

The 866 fields display in Primo.

866	3	1	\$\$\$a v.13(1960)-v.69(2017); \$\$\$8 1.1
866	3	1	\$\$\$a no.243(2018)- \$\$\$8 2.1
863	3	0	\$\$\$a 13-69 \$\$\$i 1960-2017 \$\$\$w n \$\$\$8 1.1
863	3	0	\$\$\$a 243- \$\$\$i 2018- \$\$\$8 2.1

Item records: pattern info

Because the item records were created from the prediction patterns in the 853 fields, each item record will indicate the pattern type and linking number:

The screenshot shows the 'Physical Item Editor' interface. At the top, the title is 'Physical Item Editor'. Below it, the 'Resource description' is 'Administrative law review : [mbj testing prediction patterns] Administrative Law Section American Bar Association [Chicago] : V'. The 'Main Library' is 'Reference; K1 .D56' and the 'Holdings ID' is '2210919980002907'. There are links for 'View all holdings', 'View all items', and 'Browse shelf listing'. The 'Barcode' is '-' and the 'Process type' is 'Acquisition'. Below this is a navigation bar with tabs for 'General Information', 'ENUM/CHRON Information', 'Notes', and 'History'. The 'ENUM/CHRON Information' tab is active, showing a form with fields for 'Year of issue' (set to '-'), 'Enumeration A' (69), 'Enumeration B' (1), and 'Enumeration C' through 'H'. On the right, there are fields for 'Chronology I' (2017), 'Chronology J' (21), 'Chronology K', 'Chronology L', 'Chronology M', and 'Break indicator'. At the bottom, there is a 'Pattern Information' section with a yellow background, showing 'Pattern type' as '3 (853)' and 'Linking number' as '1'. The 'Type of unit' is '-'. The 'Pattern Information' section is highlighted with a yellow background.

This item record was created from the first (linking number 1) 853 field.



Physical Item Editor

Resource description [Administrative law review : \[mbj testing prediction patterns\] Administrative Law Section American Bar Association \[Chicago\] : V](#)
[Main Library: Reference: K1 .D56](#) **Holdings ID** 2210919980002907

[View all holdings](#)

Barcode -

[View all items](#)

Process type Acquisition

[Browse shelf listing](#)

General Information

ENUM/CHRON Information

Notes

History

Year of issue -

Enumeration A

Chronology I

Enumeration B

Chronology J

Enumeration C

Chronology K

Enumeration D

Chronology L

Enumeration E

Chronology M

Enumeration F

Break indicator

Enumeration G

Enumeration H

Pattern Information

Pattern type

Linking number

Type of unit -

And this item was created from the second (linking number 2) 853 field.

After issues are received,

Let's pretend that I've received v.69 no.1-3 (Spr-Fal 2017)

Received Items List Save Back Save and Receive

Administrative law review : [mbj testing prediction patterns], ...

Vendor/Account: EBSCO Information Servic... Order Line: POL-7922 Order: -
Status: In Review (2017-08-31) Order line type: Print Journal - Subscription

PO line owner: Main Library Sent date: -

Receiving note: -


PO line Items Bibliographic Information

1 - 16 of 16 Sort routine Receive New Items Analytics Issues Report

Receiving status: All Location: All

	Library	Location	Temp Loc	Date Receive	Modifie	Call Number	Alternative Call Number	Barcode	Description	Current Step		
1	<input type="checkbox"/>	Main Library	Reference	No	-	09/0...	K1 .D56	-	<input type="text"/>	v.69:no.4(2017:Winte...	-	...
2	<input checked="" type="checkbox"/>	Main Library	Reference	No	-	09/0...	K1 .D56	-	<input type="text"/>	v.69:no.3(2017:Autu...	-	...
3	<input checked="" type="checkbox"/>	Main Library	Reference	No	-	09/0...	K1 .D56	-	<input type="text"/>	v.69:no.2(2017:Sum...	-	...
4	<input checked="" type="checkbox"/>	Main Library	Reference	No	-	09/0...	K1 .D56	-	<input type="text"/>	v.69:no.1(2017:Spring)	-	...

If I open the holdings record in Metadata Editor and save,

File		Edit		Tools	
You have 2 warning(s) in your record					
Working on -Administrative law r (2210919980002907) , Created by AlmaUser01 (08/31/2017 12:33:02 PM PDT)					
LDR			00333ny##a22001094n#4500		
007			ta		
005			20170905063752.0		
008			1011252u####8###4001uueng0000000		
852	0		\$\$b MAIN \$\$c reference \$\$h K1 \$\$i .D56		
853	3	1	\$\$a v. \$\$b no. \$\$u 4 \$\$v r \$\$i (year) \$\$j (season) \$\$w q \$\$x 21 \$\$8 1 \$\$n Quarterly		
	853	3	1	\$\$a no. \$\$u 12 \$\$v c \$\$i (year) \$\$j (season) \$\$w m \$\$x 01 \$\$8 2 \$\$n Monthly	

Alma can automatically generate the 863 and 866 field. (I don't know why it generated two 863 fields.)

866	4	1	\$\$a v.69:no.1-v.69:no.3, \$\$8 1.1		
863	4	0	\$\$8 1.1 \$\$a 69 \$\$b 1-3 \$\$w g		
863	4	0	\$\$8 1.1 \$\$a 69 \$\$b 1-3 \$\$w g		

Subsequently, if I receive additional issues,

Received Items List Save Back **Save and Receive**

Receiving status: All Location: All Clear all

	<input type="checkbox"/> Library	Location	Temp Loc	Date Receive	Modifie	Call Number	Alternative Call Number	Barcode	Description	Current Step		
1	<input type="checkbox"/>	Main Library	Reference	No	-	09/0...	K1 .D56	-	<input type="text"/>	no.254(2018:Dec.)	-	...
2	<input type="checkbox"/>	Main Library	Reference	No	-	09/0...	K1 .D56	-	<input type="text"/>	no.253(2018:Nov.)	-	...
3	<input type="checkbox"/>	Main Library	Reference	No	-	09/0...	K1 .D56	-	<input type="text"/>	no.252(2018:Oct.)	-	...
4	<input type="checkbox"/>	Main Library	Reference	No	-	09/0...	K1 .D56	-	<input type="text"/>	no.251(2018:Sept.)	-	...
5	<input type="checkbox"/>	Main Library	Reference	No	-	09/0...	K1 .D56	-	<input type="text"/>	no.250(2018:Aug.)	-	...
6	<input type="checkbox"/>	Main Library	Reference	No	-	09/0...	K1 .D56	-	<input type="text"/>	no.249(2018:July)	-	...
7	<input type="checkbox"/>	Main Library	Reference	No	-	09/0...	K1 .D56	-	<input type="text"/>	no.248(2018:June)	-	...
8	<input type="checkbox"/>	Main Library	Reference	No	-	09/0...	K1 .D56	-	<input type="text"/>	no.247(2018:May)	-	...
9	<input type="checkbox"/>	Main Library	Reference	No	-	09/0...	K1 .D56	-	<input type="text"/>	no.246(2018:Apr.)	-	...
...	<input checked="" type="checkbox"/>	Main Library	Reference	No	-	09/0...	K1 .D56	-	<input type="text"/>	no.245(2018:Mar.)	-	...
...	<input checked="" type="checkbox"/>	Main Library	Reference	No	-	09/0...	K1 .D56	-	<input type="text"/>	no.244(2018:Feb.)	-	...
...	<input checked="" type="checkbox"/>	Main Library	Reference	No	-	09/0...	K1 .D56	-	<input type="text"/>	no.243(2018:Jan.)	-	...
...	<input checked="" type="checkbox"/>	Main Library	Reference	No	-	09/0...	K1 .D56	-	<input type="text"/>	v.69:no.4(2017:Winte...	-	...

And return to the holdings record and save it

File Edit Tools

You have 3 warning(s) in your record

Working on -Administrative law r (2210919980002907) , Created by AlmaUser01 (08/31/2017 12:33:02 PM PDT), M

LDR			00439ny##a22001454n#4500	
007			ta	
005			20170905065140.0	
008			1011252u####8###4001uueng0000000	
852	0		\$\$b MAIN \$\$c reference \$\$h K1 \$\$i .D56	
853	3	1	\$\$a v. \$\$b no. \$\$u 4 \$\$v r \$\$i (year) \$\$j (season) \$\$w q \$\$x 21 \$\$8 1 \$\$n Quarterly	
	853	3	1	\$\$a no. \$\$u 12 \$\$v c \$\$i (year) \$\$j (season) \$\$w m \$\$x 01 \$\$8 2 \$\$n Monthly
866	4	1	\$\$a v.69:no.1-v.69:no.3, \$\$8 1.1	
863	4	0	\$\$8 1.1 \$\$a 69 \$\$b 1-3 \$\$w g	
863	4	0	\$\$8 1.1 \$\$a 69 \$\$b 1-3 \$\$w g	

Alma generates several additional 863 and 866 fields. (Some 863 fields appear to be duplicates.)

866	4	1	\$\$\$a v.69:no.1-v.69:no.3, \$\$\$ 1.1
866	3	1	\$\$\$a no.243-no.245, \$\$\$ 2.1
863	4	0	\$\$\$ 1.1 \$\$\$a 69 \$\$\$b 1-3 \$\$\$w g
863	4	0	\$\$\$ 1.1 \$\$\$a 69 \$\$\$b 1-3 \$\$\$w g
863	4	0	\$\$\$ 1.1 \$\$\$a 69
863	4	0	\$\$\$ 2.1 \$\$\$a 243-245 \$\$\$w g
863	4	0	\$\$\$ 1.1 \$\$\$a 69
863	4	0	\$\$\$ 2.1 \$\$\$a 243-245 \$\$\$w g

What if I delete all 863 and 866 fields and then save again?

Record saved at 06:55:22. You have 5 warning(s) in your record

Working on -Administrative law r (2210919980002907) , Created by AlmaUser01 (08/31/2017 12:33:02 PM PDT), M

LDR 00587ny##a22002054n#4500

007			ta
005			20170905065522.0
008			1011252u####8###4001uueng0000000
852	0		\$\$\$b MAIN \$\$\$c reference \$\$\$h K1 \$\$\$i .D56
853	3	1	\$\$\$a v. \$\$\$b no. \$\$\$u 4 \$\$\$v r \$\$\$i (year) \$\$\$j (season) \$\$\$w q \$\$\$x 21 \$\$\$ 1 \$\$\$n Quarterly
853	3	1	\$\$\$a no. \$\$\$u 12 \$\$\$v c \$\$\$i (year) \$\$\$j (season) \$\$\$w m \$\$\$x 01 \$\$\$ 2 \$\$\$n Monthly

The 863 and 866 fields are generated again but with fewer duplicates and weirdness.

852	3	1	\$\$\$ v. \$\$\$ no. \$\$\$ 4 \$\$\$ r \$\$\$ (year) \$\$\$ (season) \$\$\$ q \$\$\$ 21 \$\$\$ 1 \$\$\$ Quarterly
853	3	1	\$\$\$ no. \$\$\$ 12 \$\$\$ c \$\$\$ (year) \$\$\$ (season) \$\$\$ m \$\$\$ 01 \$\$\$ 2 \$\$\$ Monthly
866	3	1	\$\$\$ v.69 \$\$\$ 1.1
866	3	1	\$\$\$ no.243-no.245, \$\$\$ 2.1
863	4	0	\$\$\$ 1.1 \$\$\$ 69
863	4	0	\$\$\$ 2.1 \$\$\$ 243-245 \$\$\$ g

It would be nice if the 863 and 866 field would automatically update. Currently it seems like I have to open the holdings record in Metadata Editor, delete any existing 863 and 866 fields, save the record. Then the 863 and 866 fields are re-populated.

And if you save again, additional and duplicate 863 field are generated.

866	3	1	\$\$\$a no. 69 \$\$\$ 1.1
866	3	1	\$\$\$a no.243-no.245, \$\$\$ 2.1
863	4	0	\$\$\$ 1.1 \$\$\$a 69
863	4	0	\$\$\$ 2.1 \$\$\$a 243-245 \$\$\$w g
863	4	0	\$\$\$ 1.1 \$\$\$a 69
863	4	0	\$\$\$ 2.1 \$\$\$a 243-245 \$\$\$w g
863	4	0	\$\$\$ 1.1 \$\$\$a 69
863	4	0	\$\$\$ 2.1 \$\$\$a 243-245 \$\$\$w g
863	4	0	\$\$\$ 1.1 \$\$\$a 69
863	4	0	\$\$\$ 2.1 \$\$\$a 243-245 \$\$\$w g