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

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

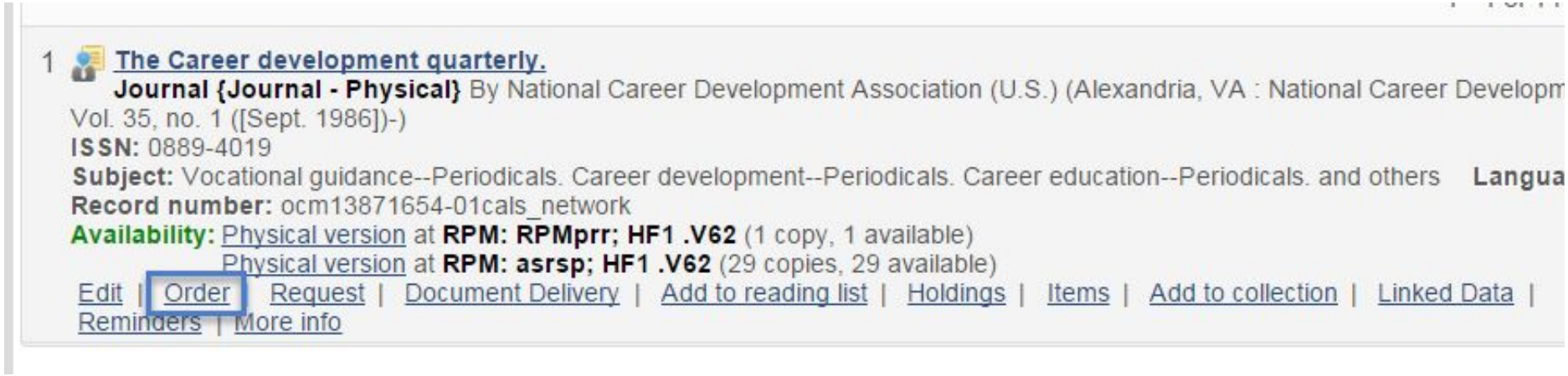
CSU(N) prediction pattern examples 853 (spreadsheet)
https://docs.google.com/spreadsheets/d/1ZKpJMFcT3cZVvsbVqQXQtNDiSQ1mmyKxec5zDTtcg5s/edit?usp=sharing

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

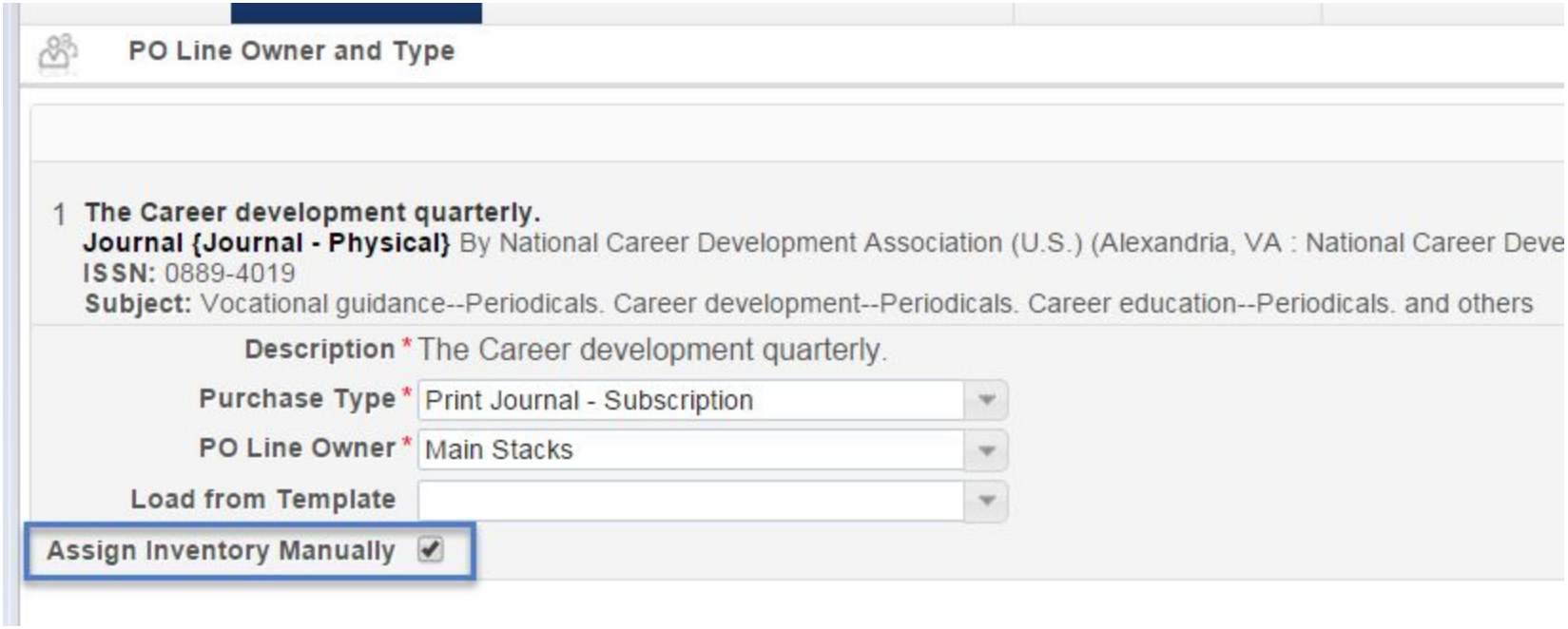
Quarterly

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

IZ record before creating PO line

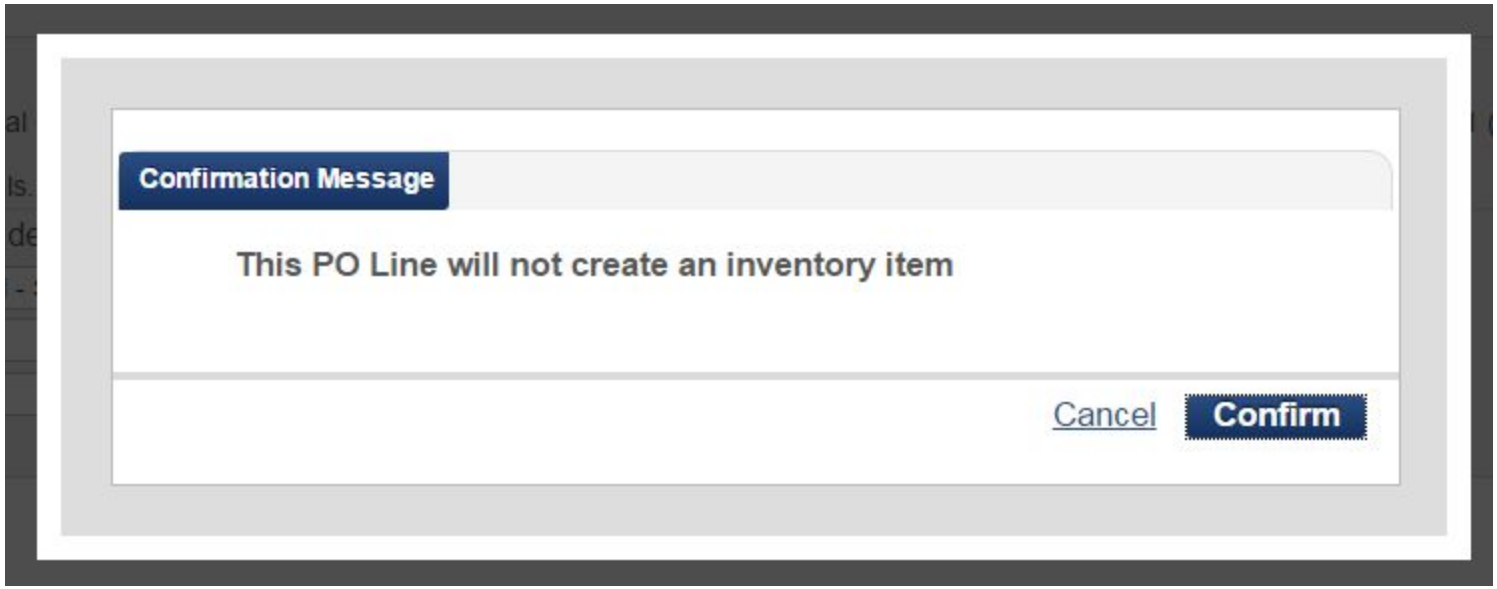


1. Create PO Line

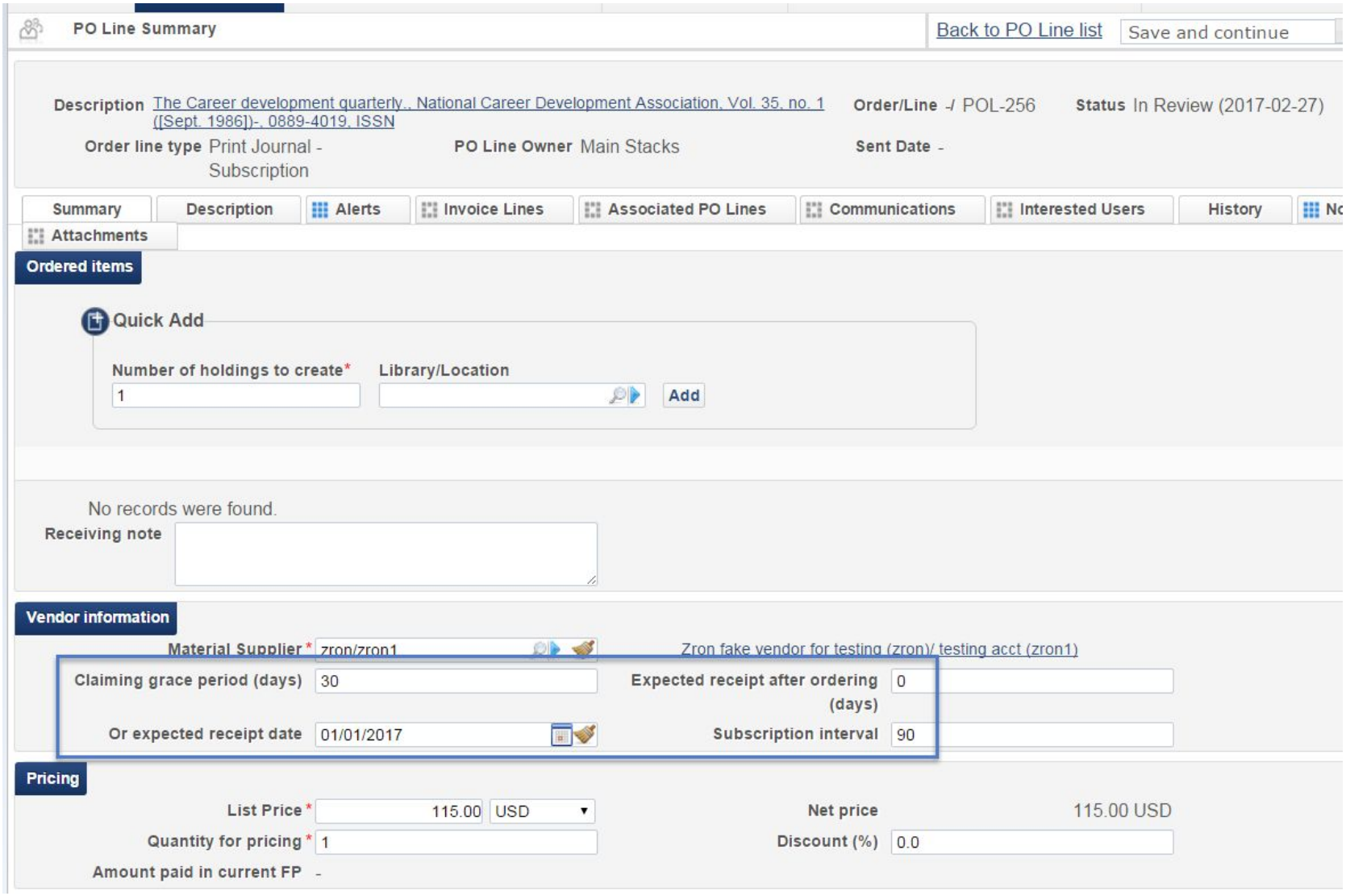


You are choosing to assign inventory manually because a holdings record already exists (for RPM/prr) and you will add new issues to it. (RPM is the reserves, periodicals and magazine department in the CSUN Oviatt Library and prr is the periodical reading room within RPM.)

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

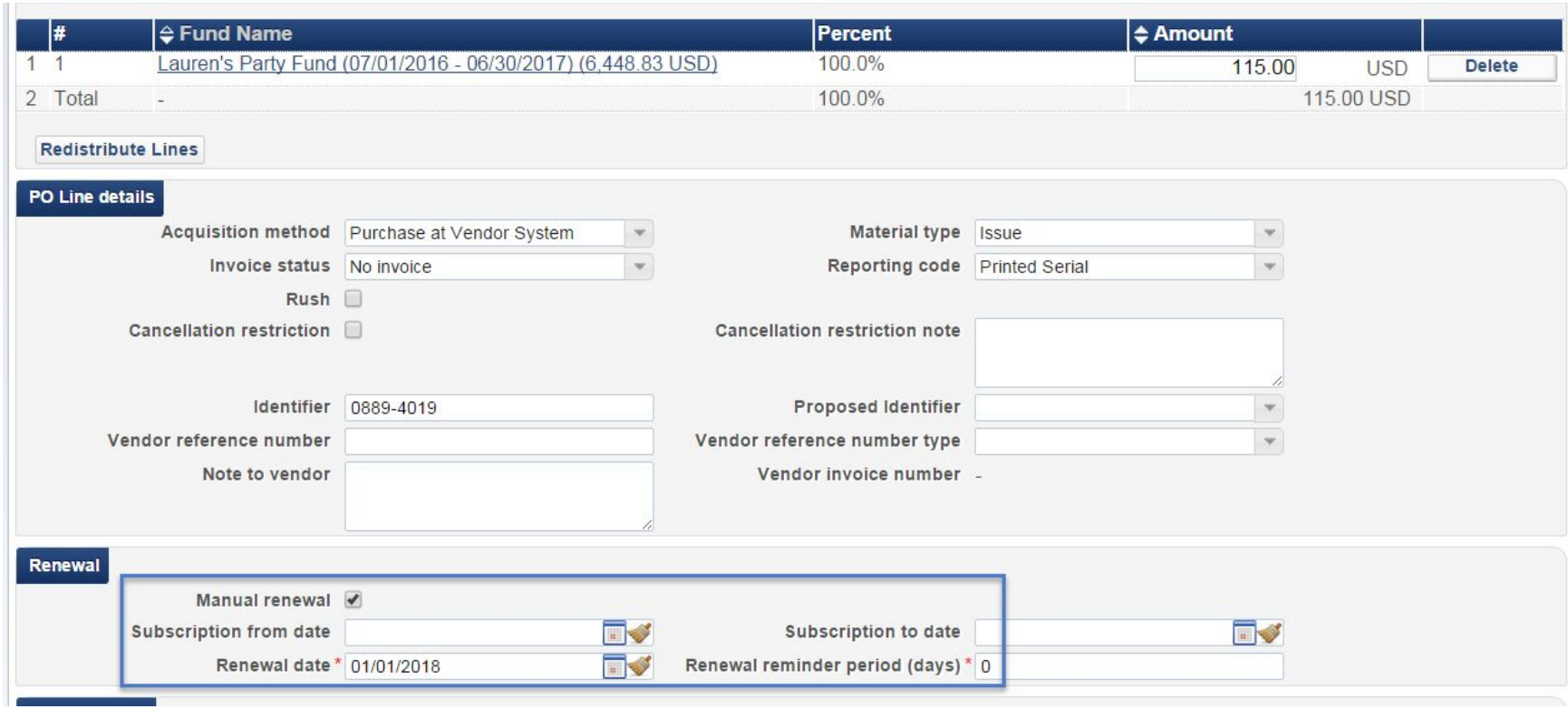
PO line summary (POL-256)



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

The claiming grace period[1], 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.

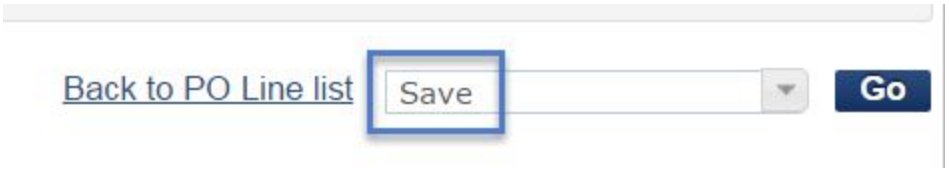
Subscription interval: "The receipt interval, in days, of the continuous order (such as 30 for monthly, 90 for quarterly, and so forth). This value is used to calculate the claim date"



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



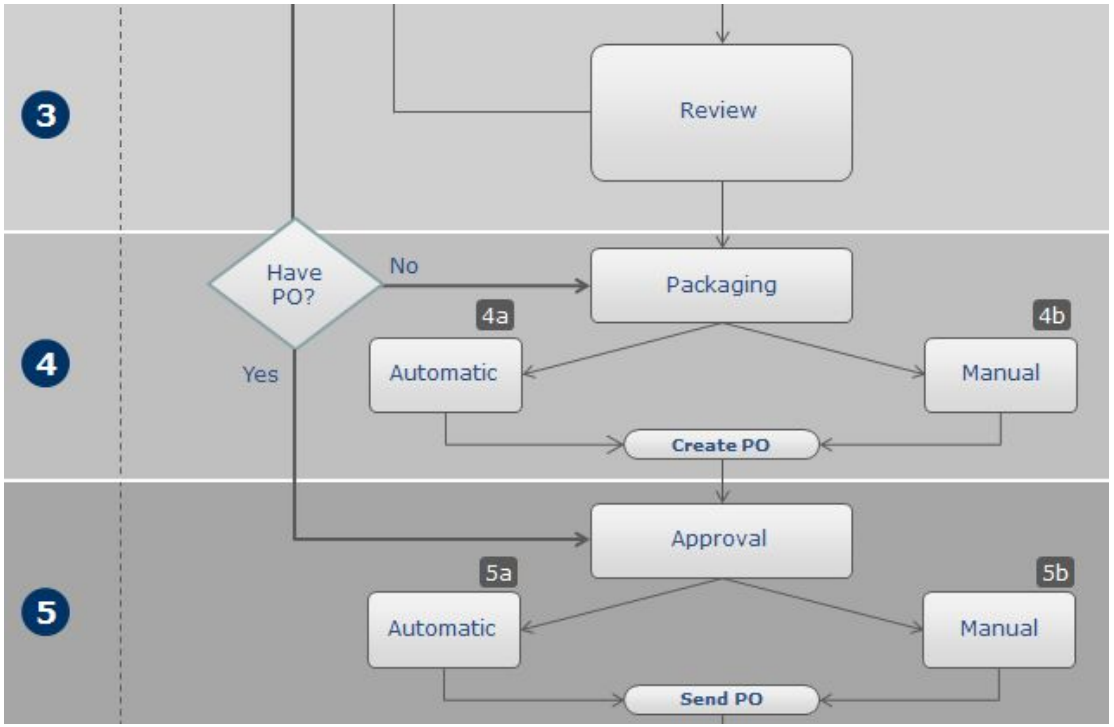
Background

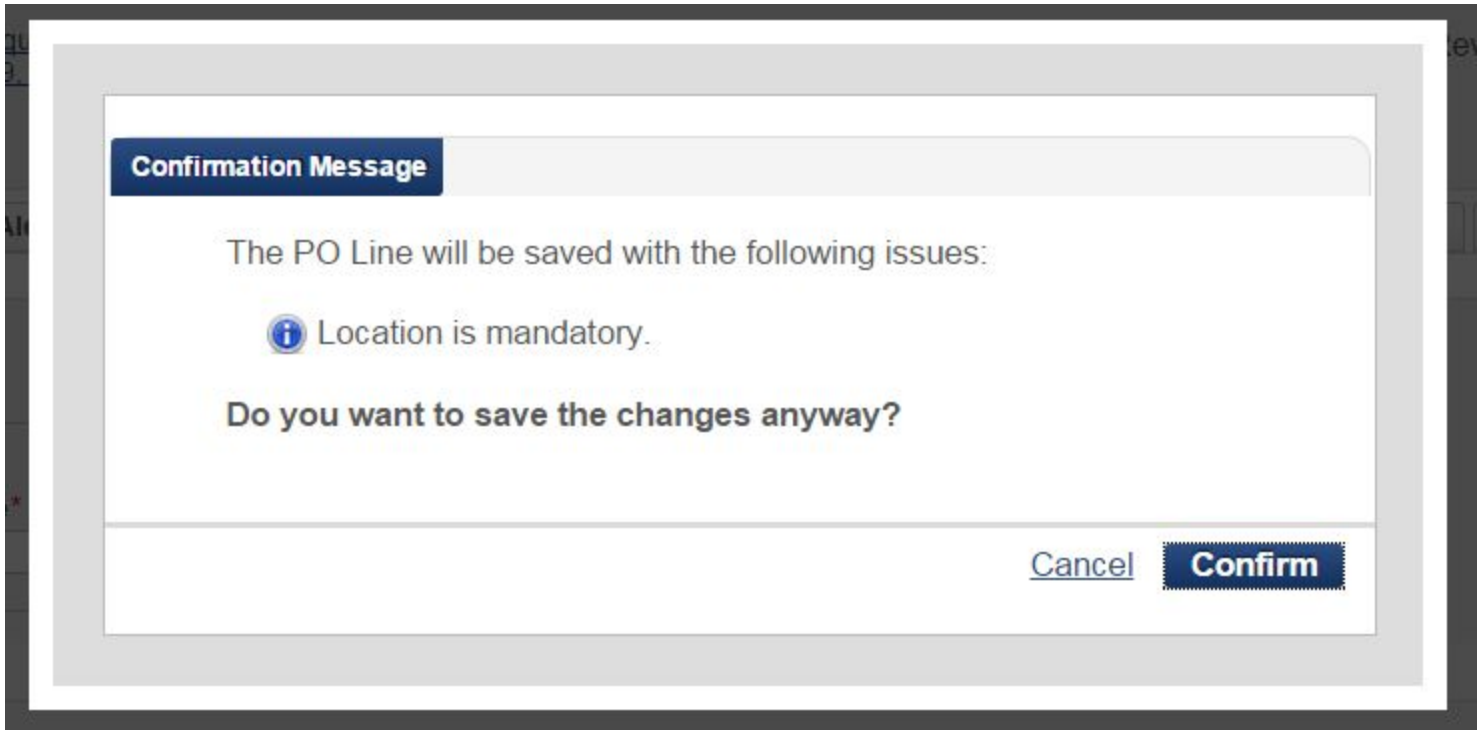
To set up a prediction pattern for a serial in Alma, you must have a PO line associated with the holdings record. If you "Save" the PO Line (rather than "Save and Continue") the PO line enters a status of "In Review".

"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.)

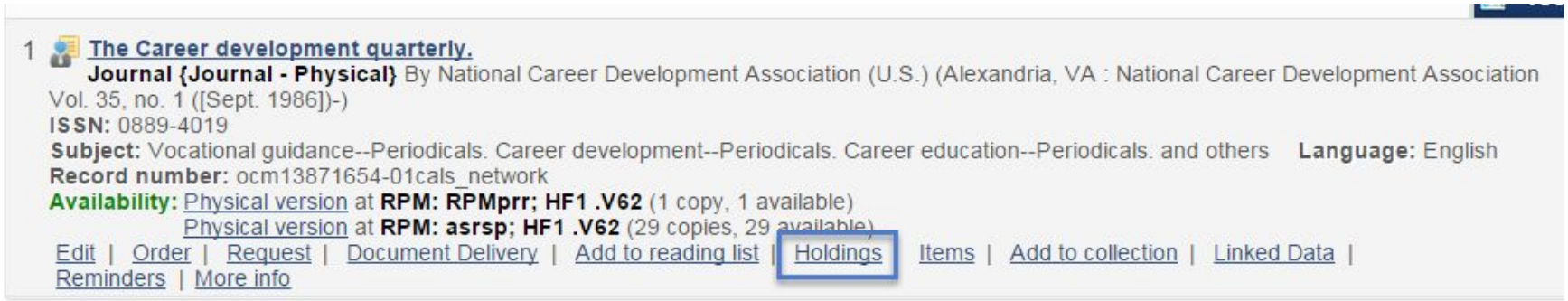
The PO line does not need to be in packaging (step 4) or sent (step 5) in order for you to set up a prediction pattern.

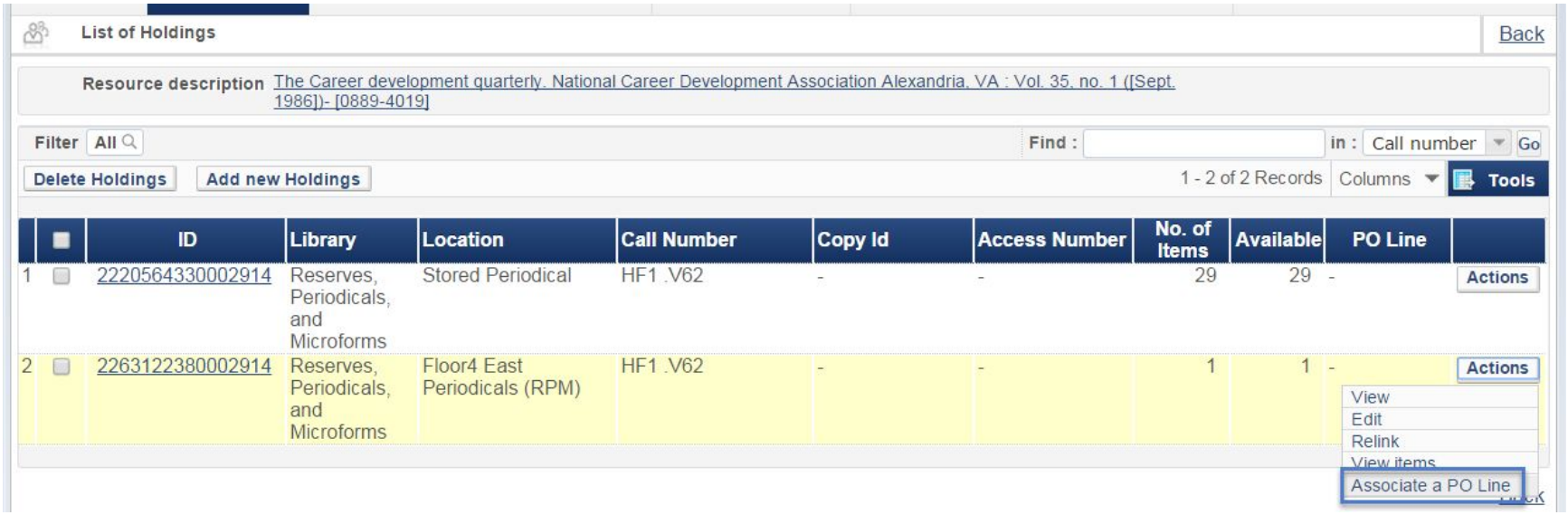

3
Review
4
Have PO?
No
Packaging
4a
Automatic
4b
Manual
Yes
Create PO
5
Approval
5a
Automatic
5b
Manual
Send PO

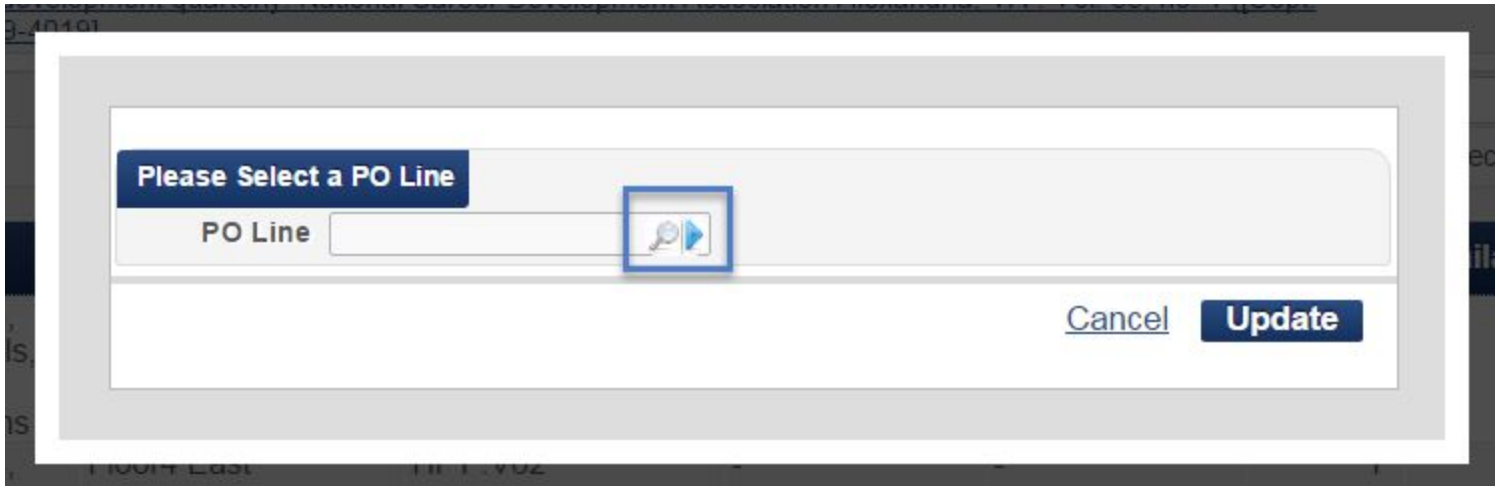


(Location will be added by associating PO line with an existing holdings record.)

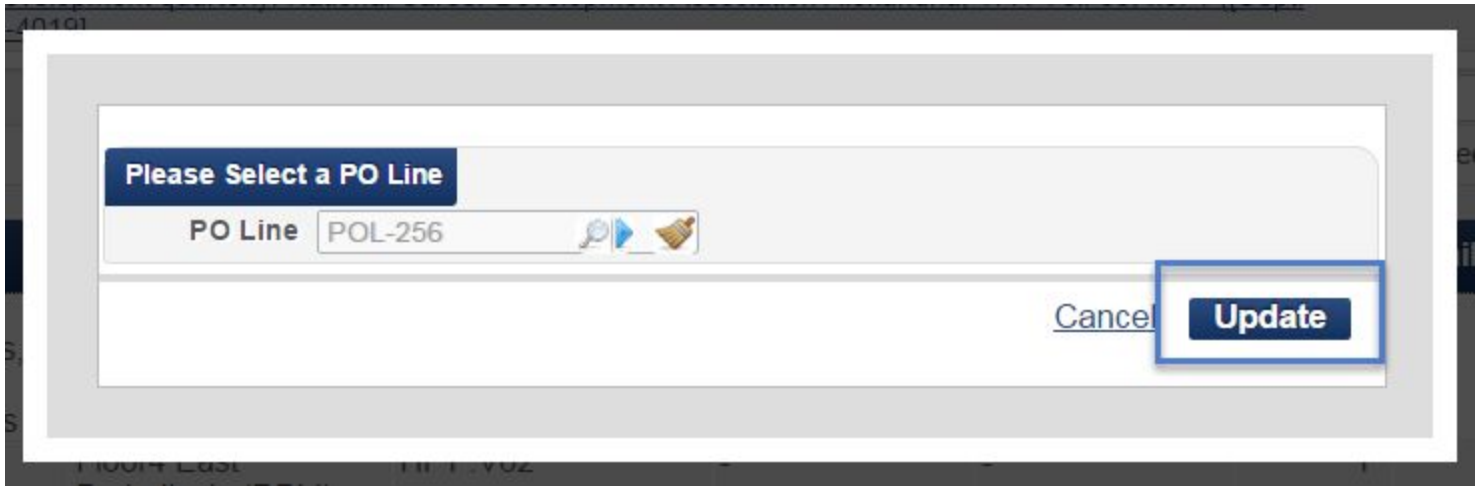
Associate the holdings record (RPM/prr) to POL-256



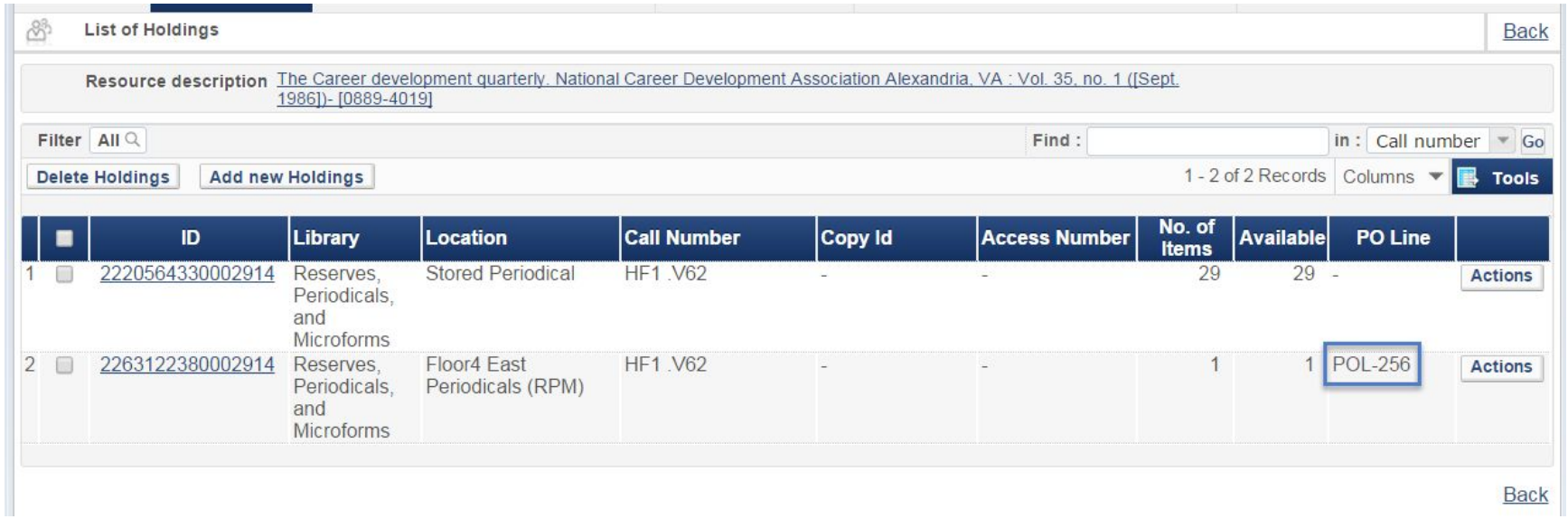



Please Select a PO Line
PO Line
Cancel
Update

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



Confirmation that POL-256 is associated with holdings record.



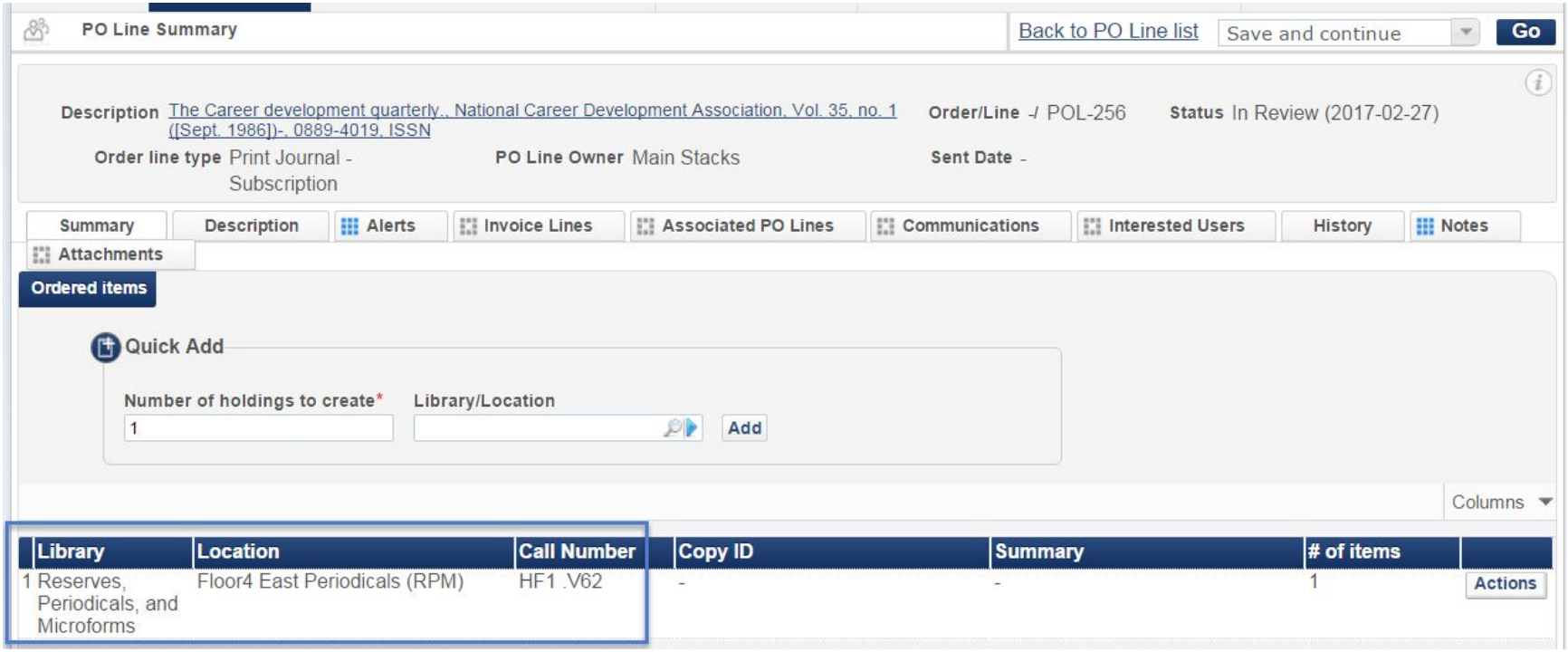
Return to edit POL-256

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

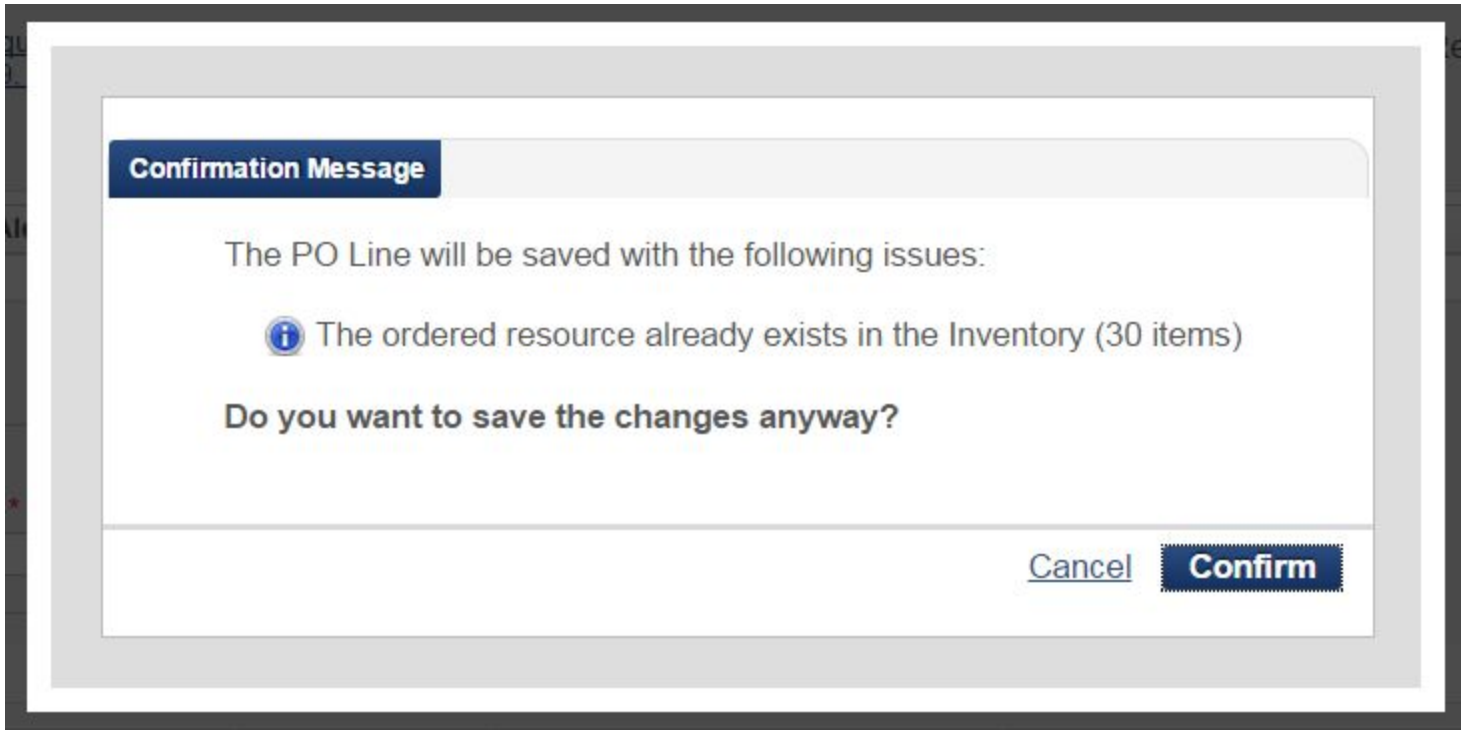
1 - 1 of 1 Records

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.



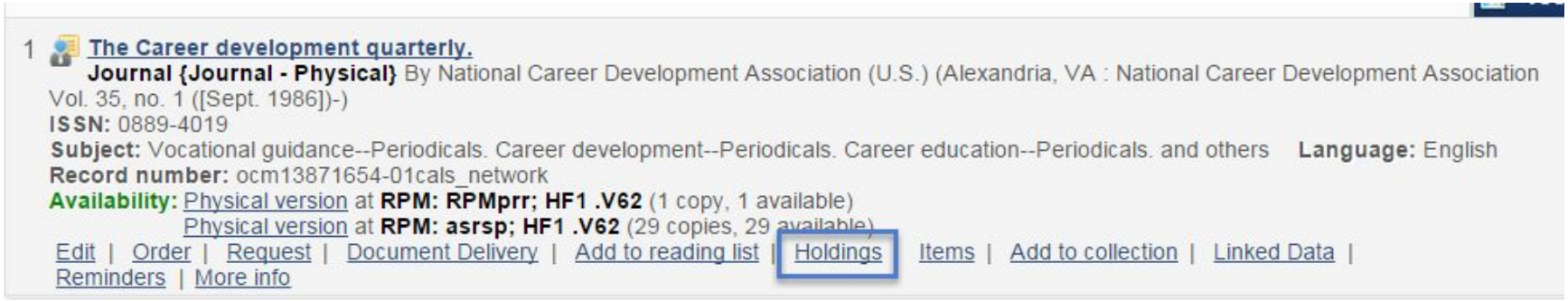
Save and continue



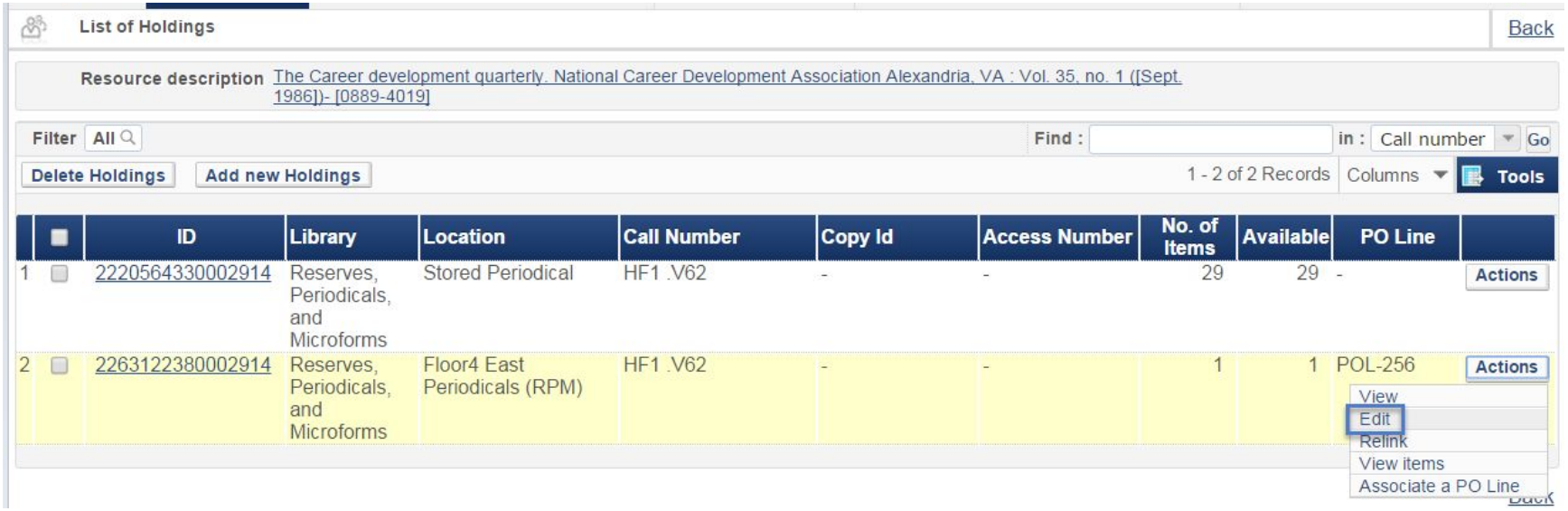
(It’s okay that inventory already exists because this is a serial and we have existing issues.)

PO line is in status: auto packaging

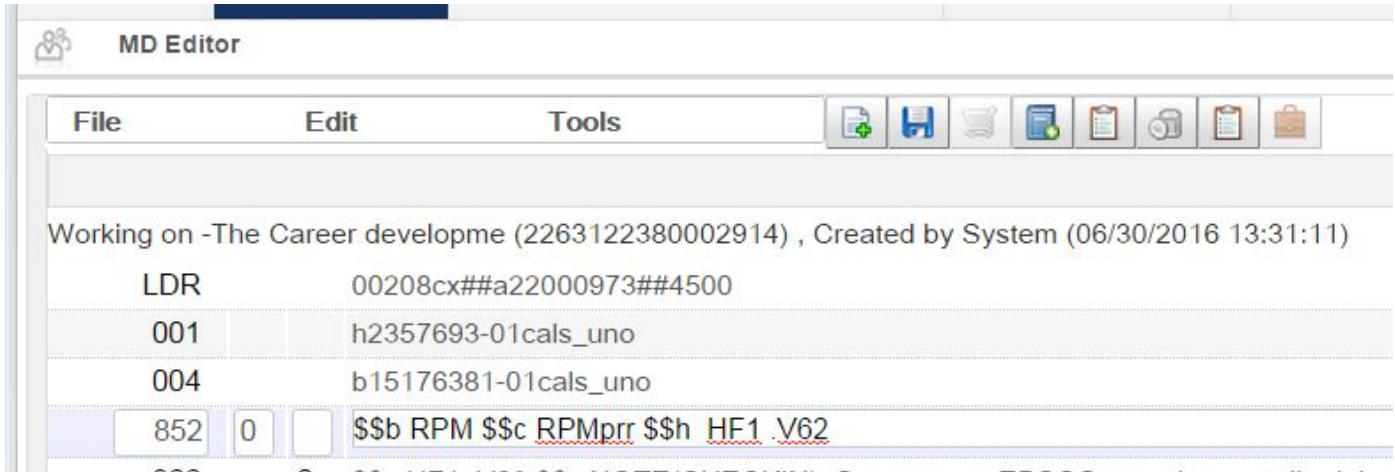
2. Setting up prediction patterns in holdings record through Metadata editor.



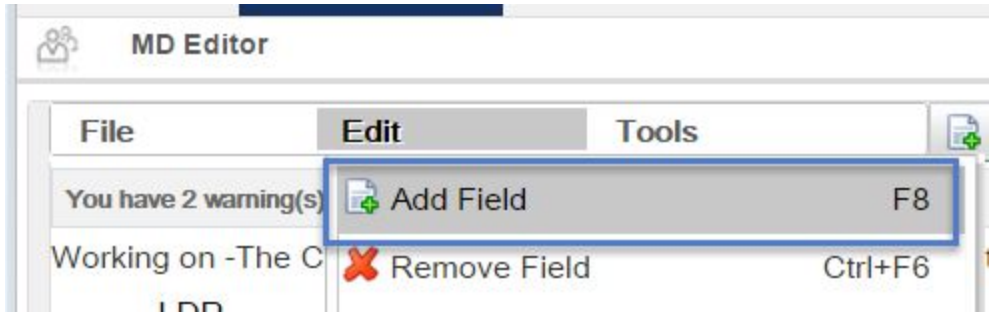
Actions, Edit



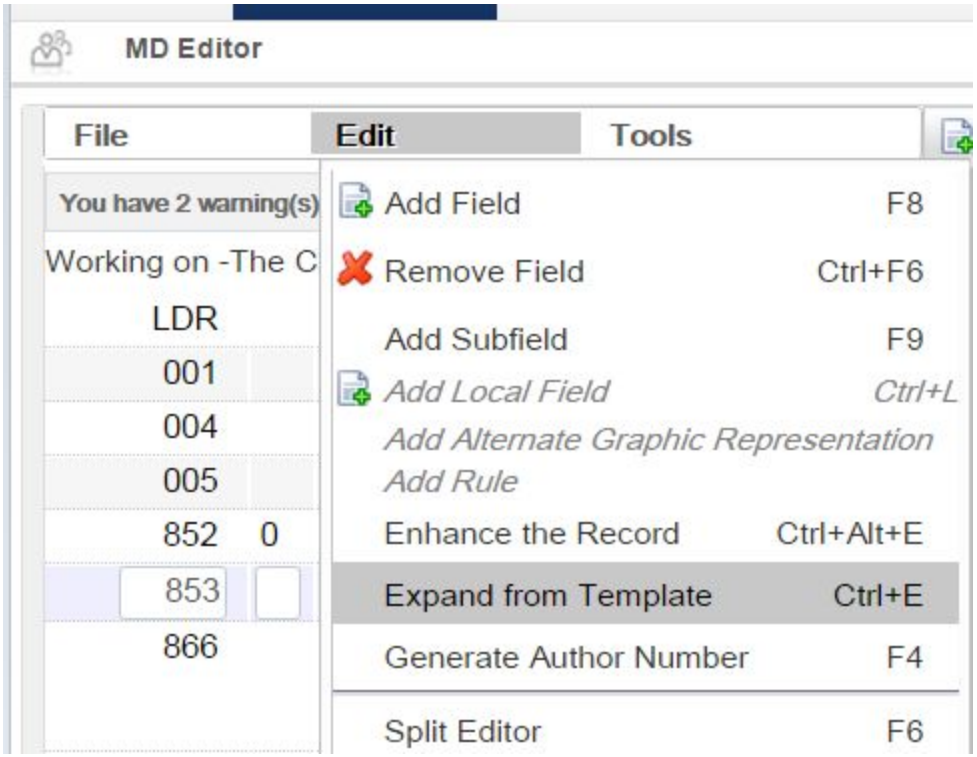
Holdings record in Metadata Editor



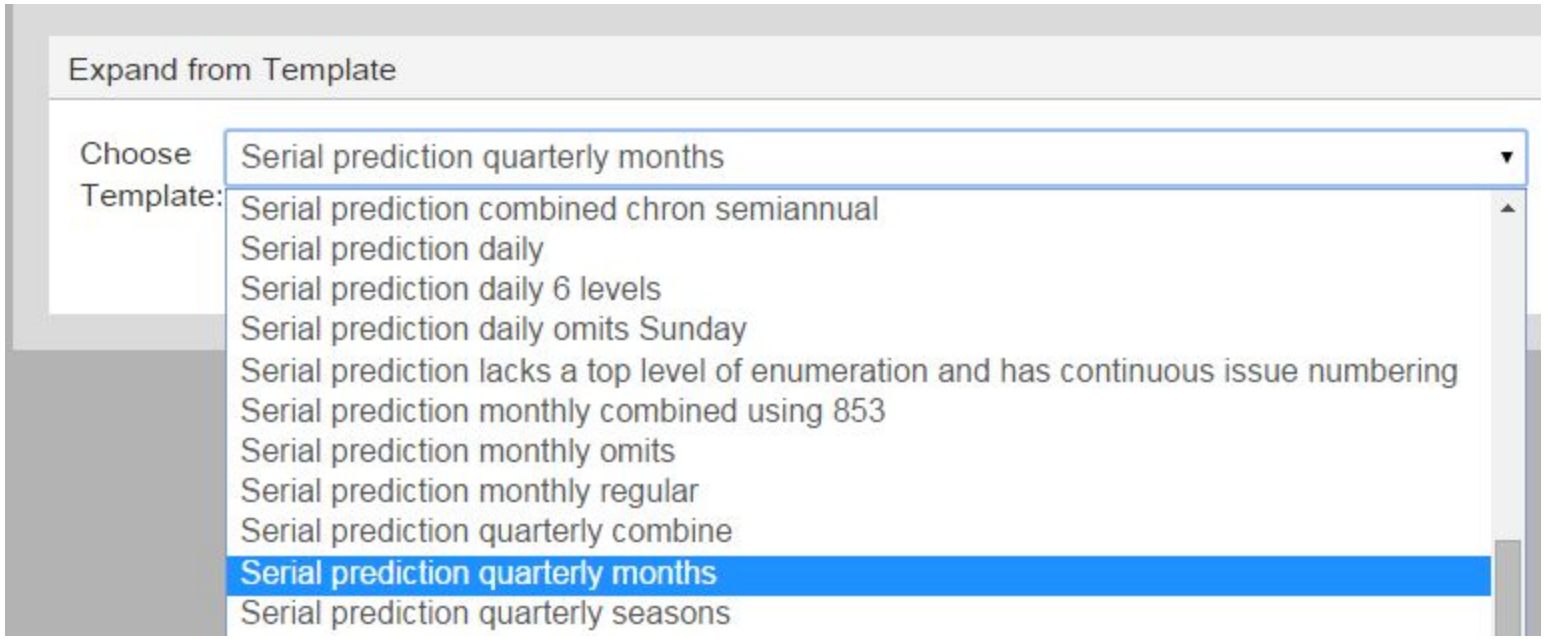
Add 853 field.

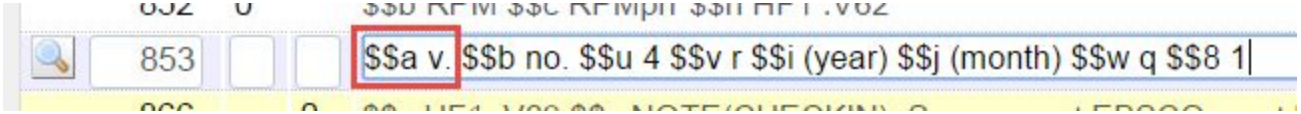


With cursor in 853 field, Edit, Expand from template.



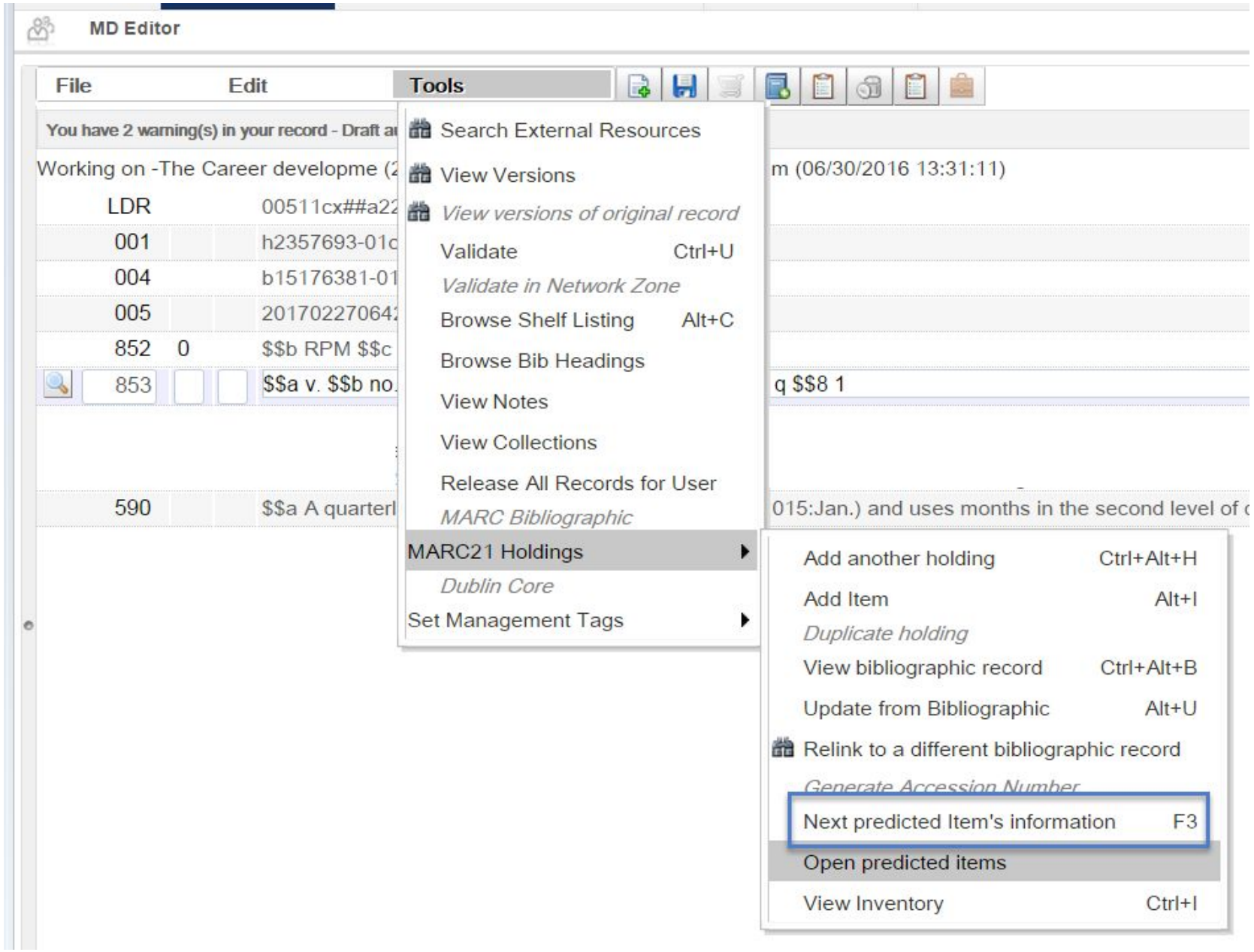
Choose template.





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

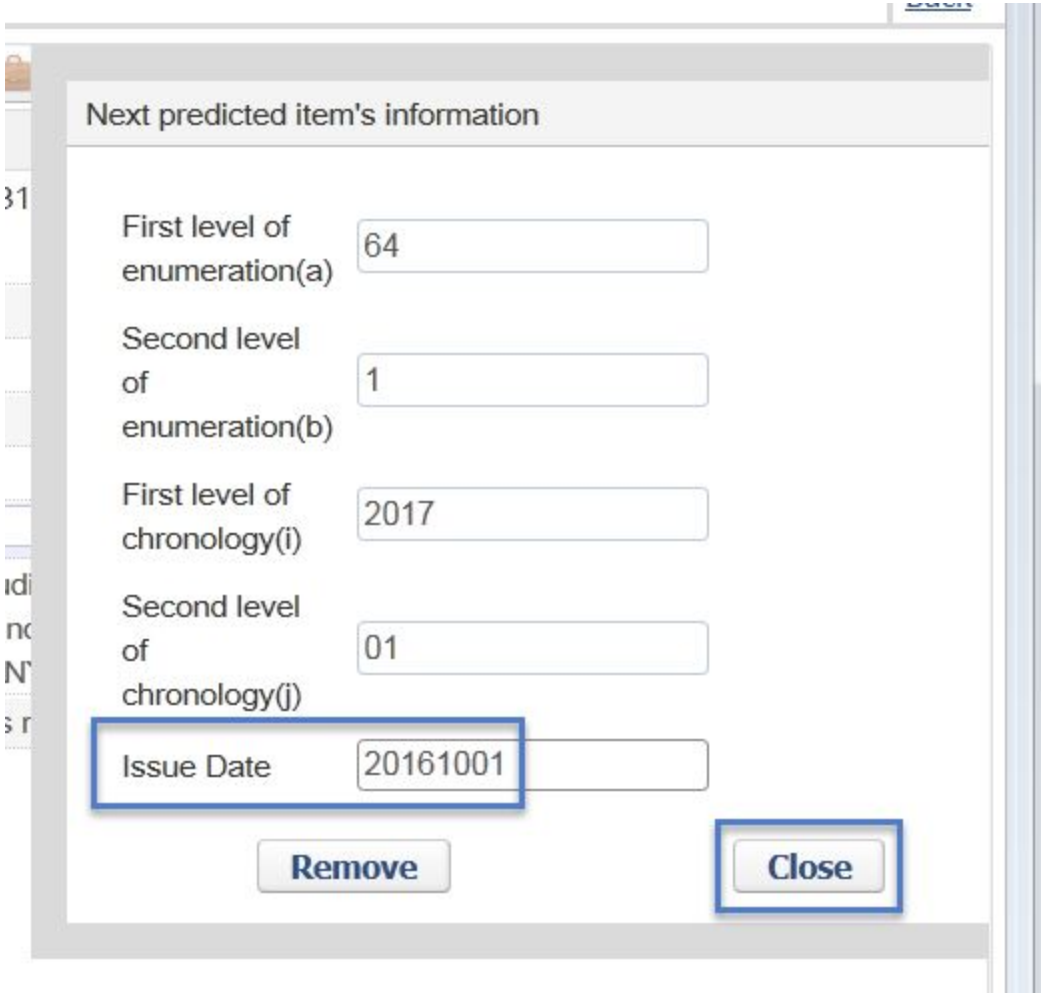
Tools, Marc21 Holdings, Next predicted item's information



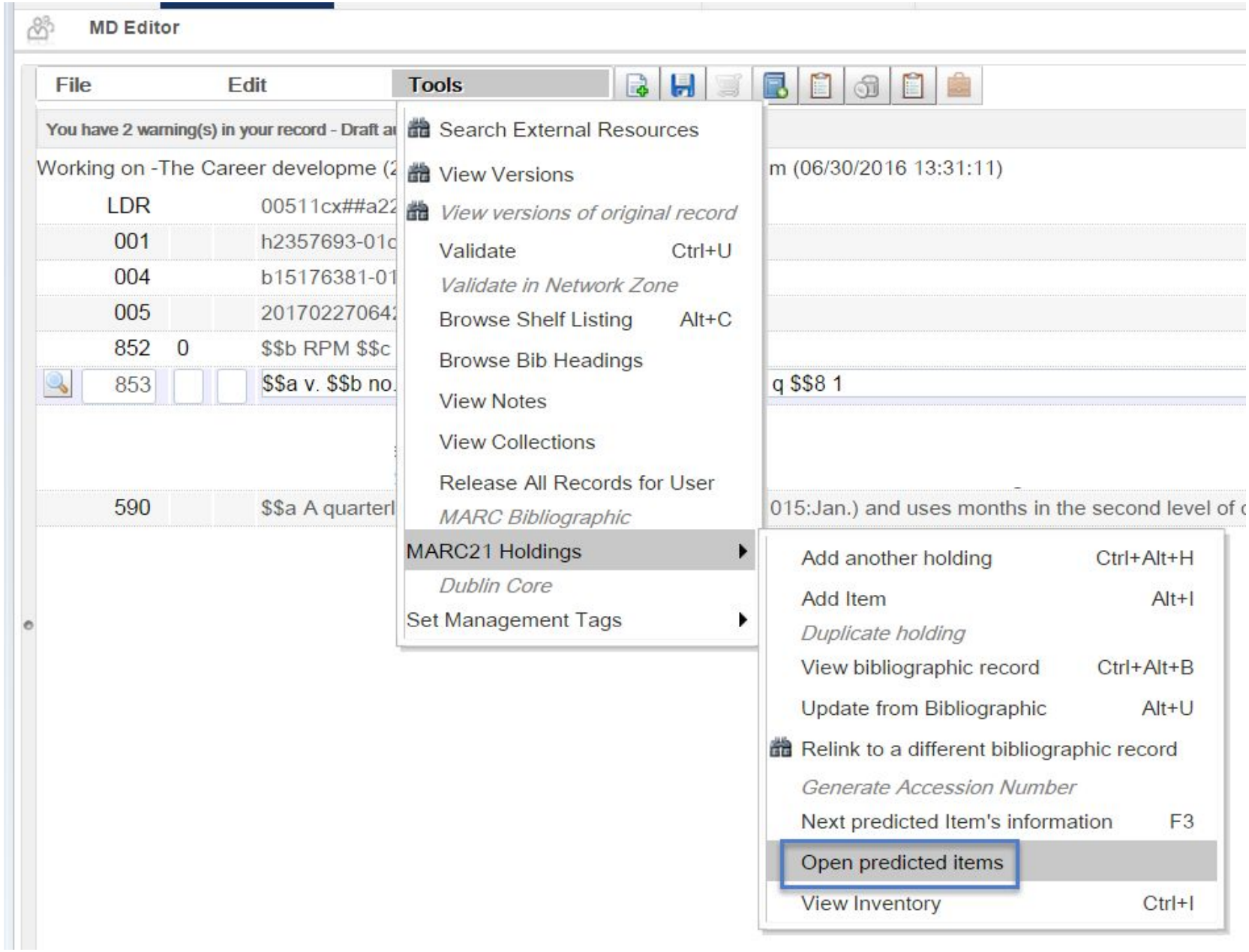
Next anticipated issue: v.64 no.1 (2017 Jan)

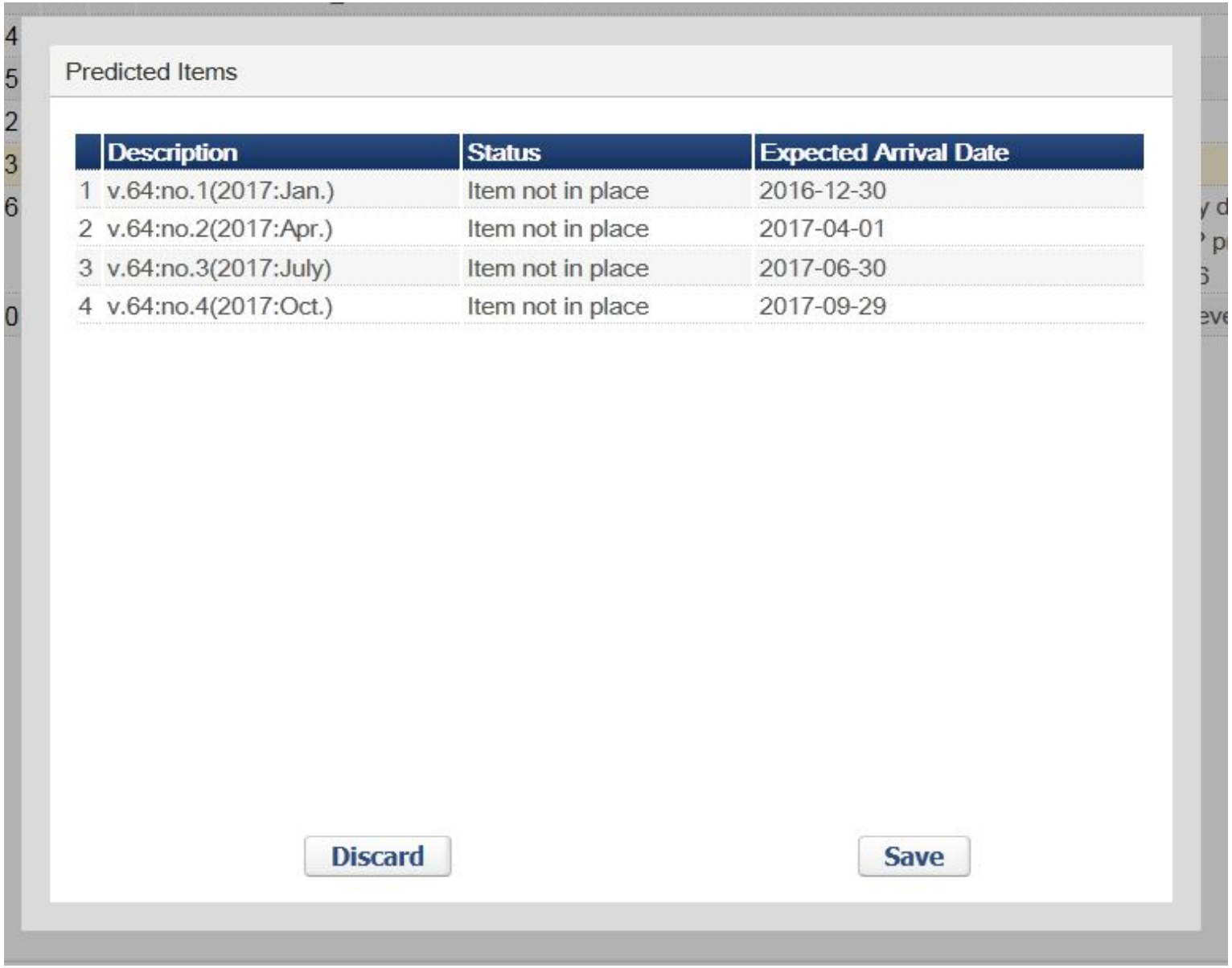
Note: Issue date is formatted yyyymmdd.

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



Tools, Marc21 Holdings, Open predicted items





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 Periodicals (RPM): HF1 .V62 — View all holdings

Sort routine: Library/Location

Status: All — Find : — in : Call number — Go

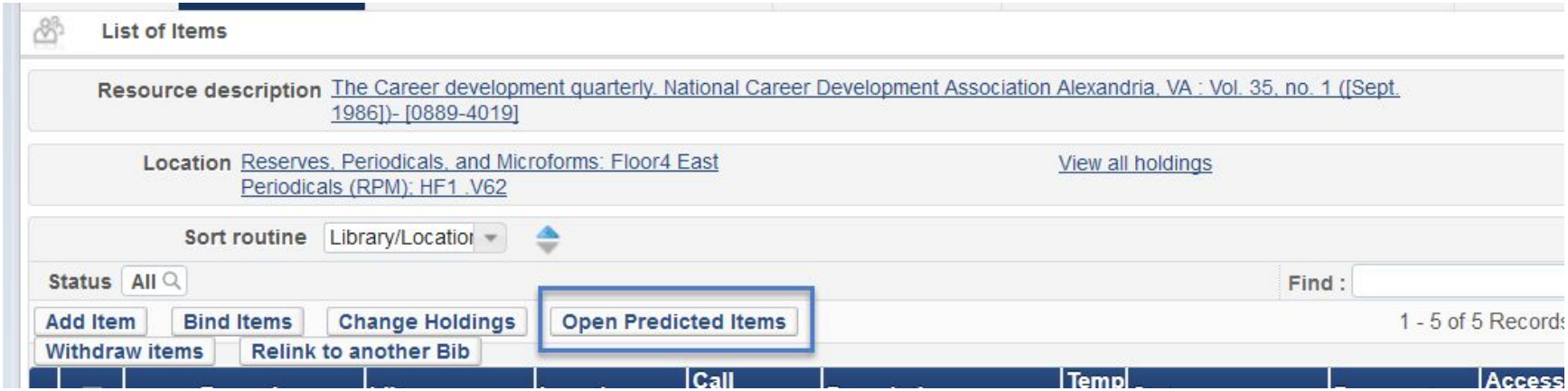
Add Item | Bind Items | Change Holdings | Open Predicted Items | Withdraw items | Relink to another Bib

1 - 5 of 5 Records — Columns — Tools

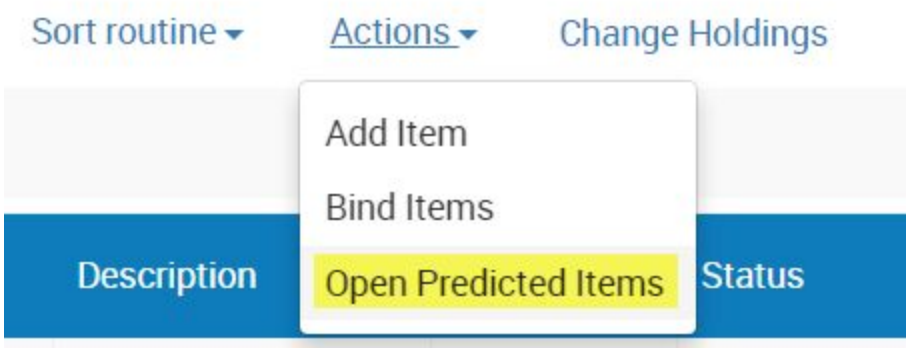
		Barcode	Library	Location	Call Number	Description	Temporary Location	Status	Process type	Access Number	Receiving date	
1		30700111585989	Reserves, Periodicals, and Microforms	Floor4 East Periodicals (RPM)	HF1 .V62	current print issues	No	Item in place	-	-	05/03/2013	Actions
2		-	Reserves, Periodicals, and Microforms	Floor4 East Periodicals (RPM)	HF1 .V62	v.64:no.4(2...	No	Item not in place	Acquisition	-	-	Actions
3		-	Reserves, Periodicals, and Microforms	Floor4 East Periodicals (RPM)	HF1 .V62	v.64:no.3(2...	No	Item not in place	Acquisition	-	-	Actions
4		-	Reserves, Periodicals, and Microforms	Floor4 East Periodicals (RPM)	HF1 .V62	v.64:no.2(2...	No	Item not in place	Acquisition	-	-	Actions
5		-	Reserves, Periodicals, and Microforms	Floor4 East Periodicals (RPM)	HF1 .V62	v.64:no.1(2...	No	Item not in place	Acquisition	-	-	Actions

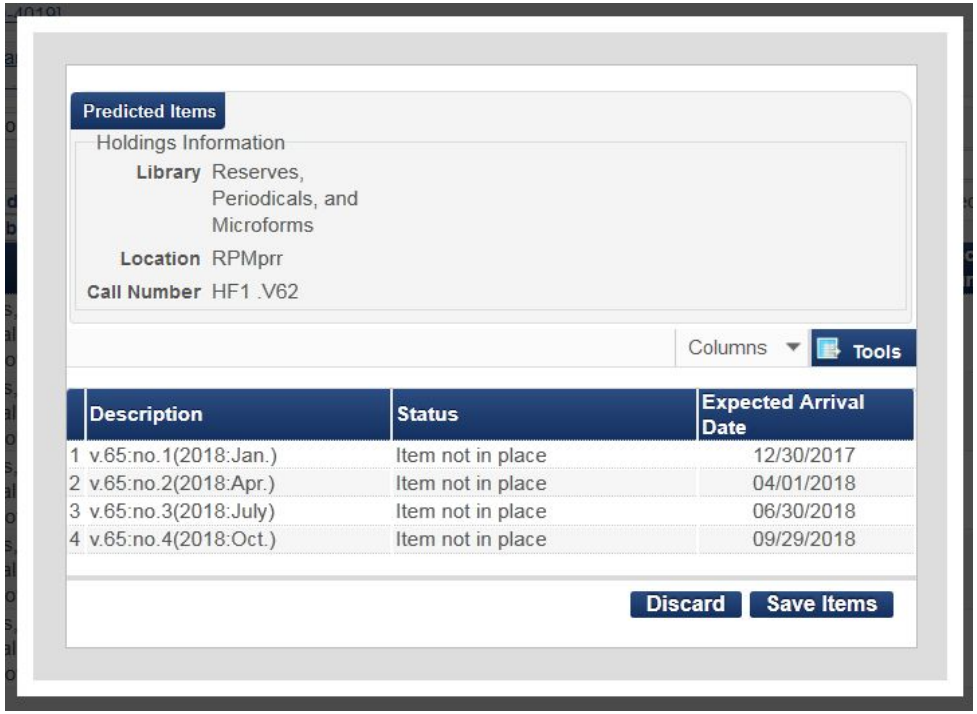
Prediction patterns will create items for 1 year of issues (regardless of frequency). To create items for an additional year,

Open predicted items



New UI: Actions, Open Predicted 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).

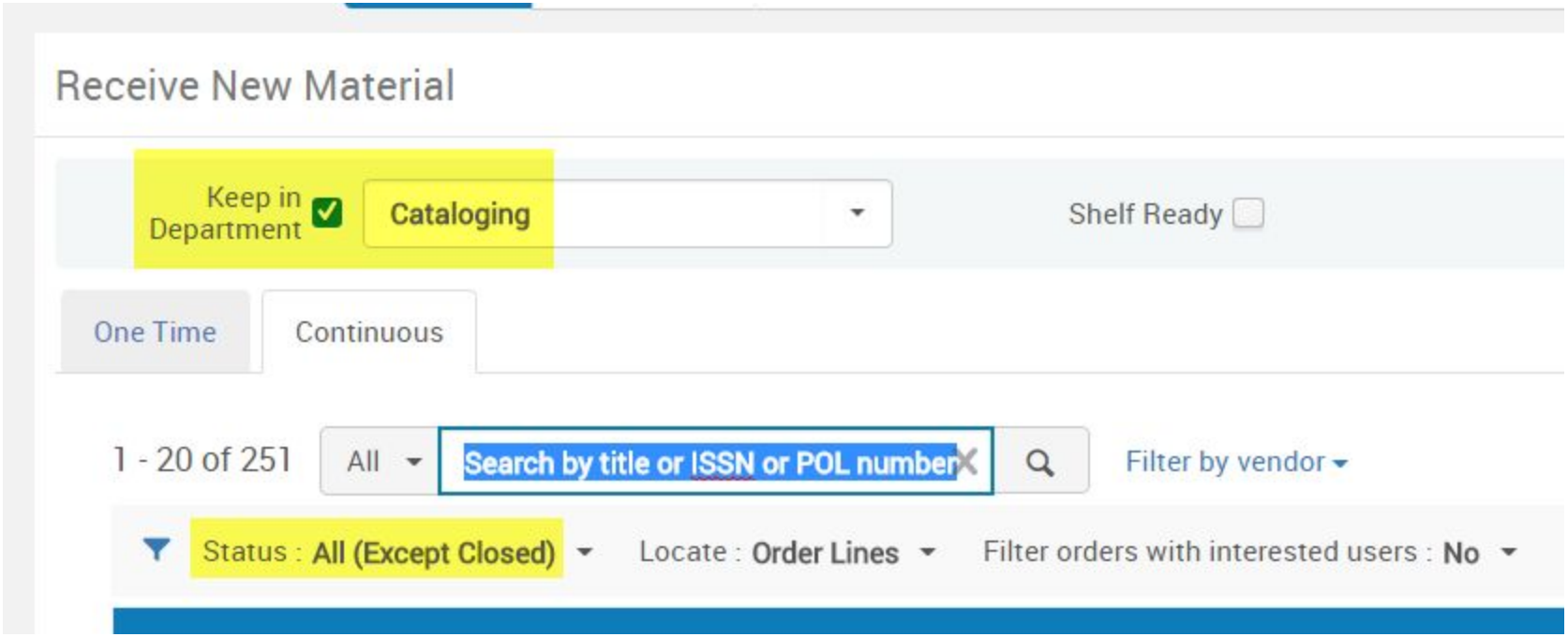
3. Receiving issues created by a prediction pattern:

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

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

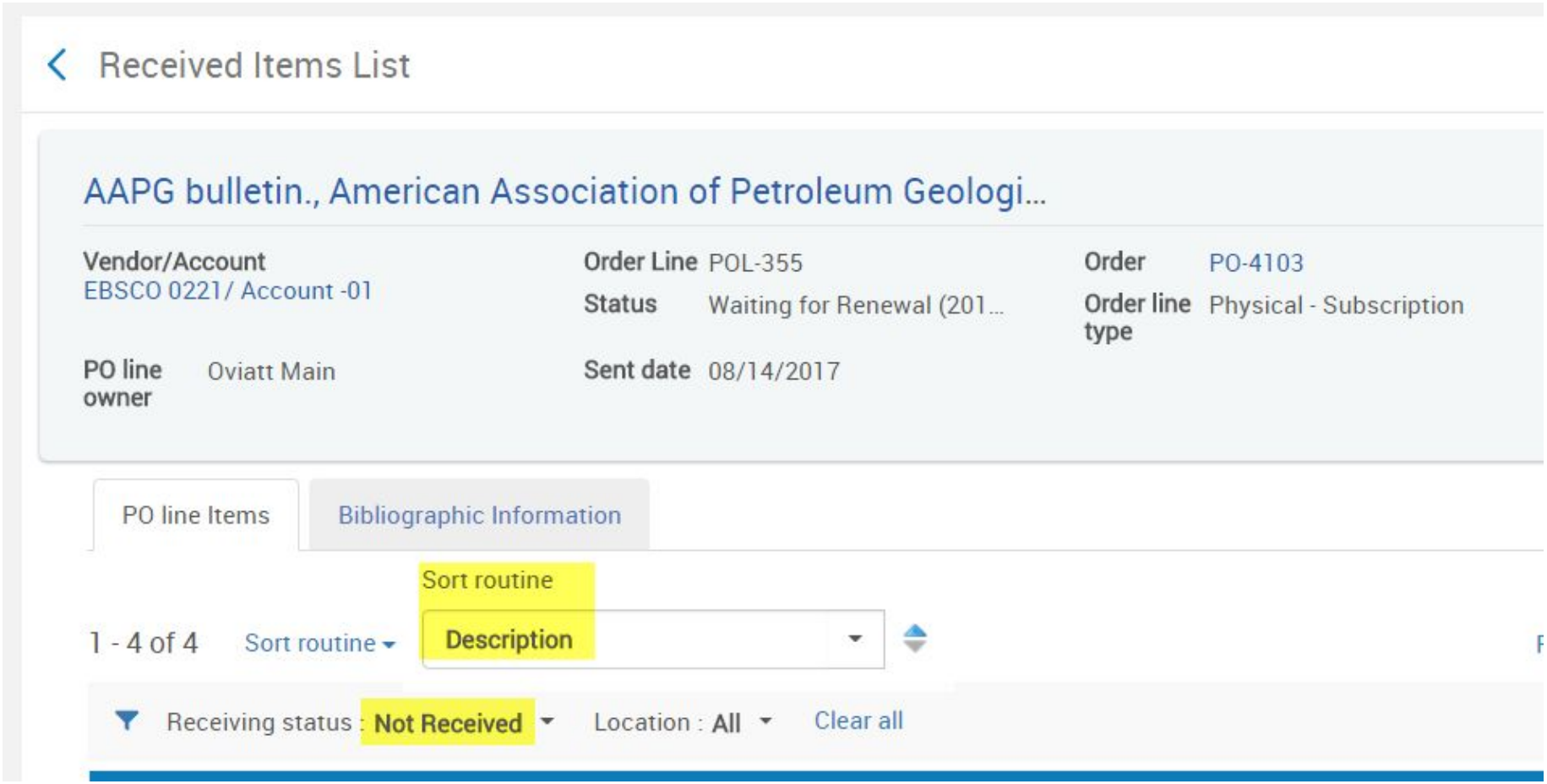
Summary of receiving workflow:

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

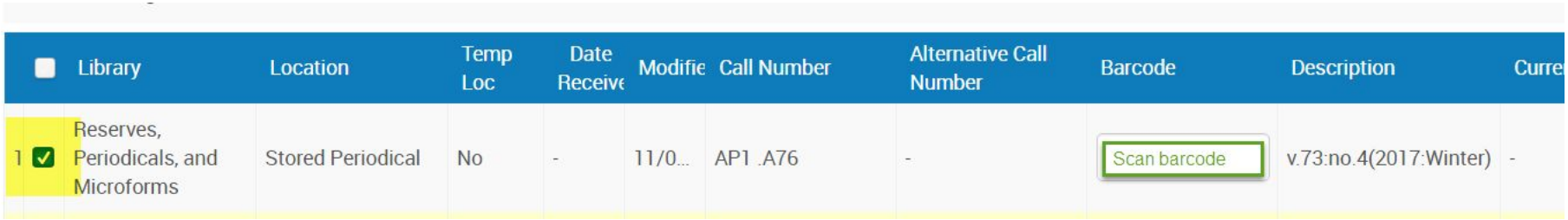


3. ••• , Manage items. (Do not use Receive as this will create additional item records.)

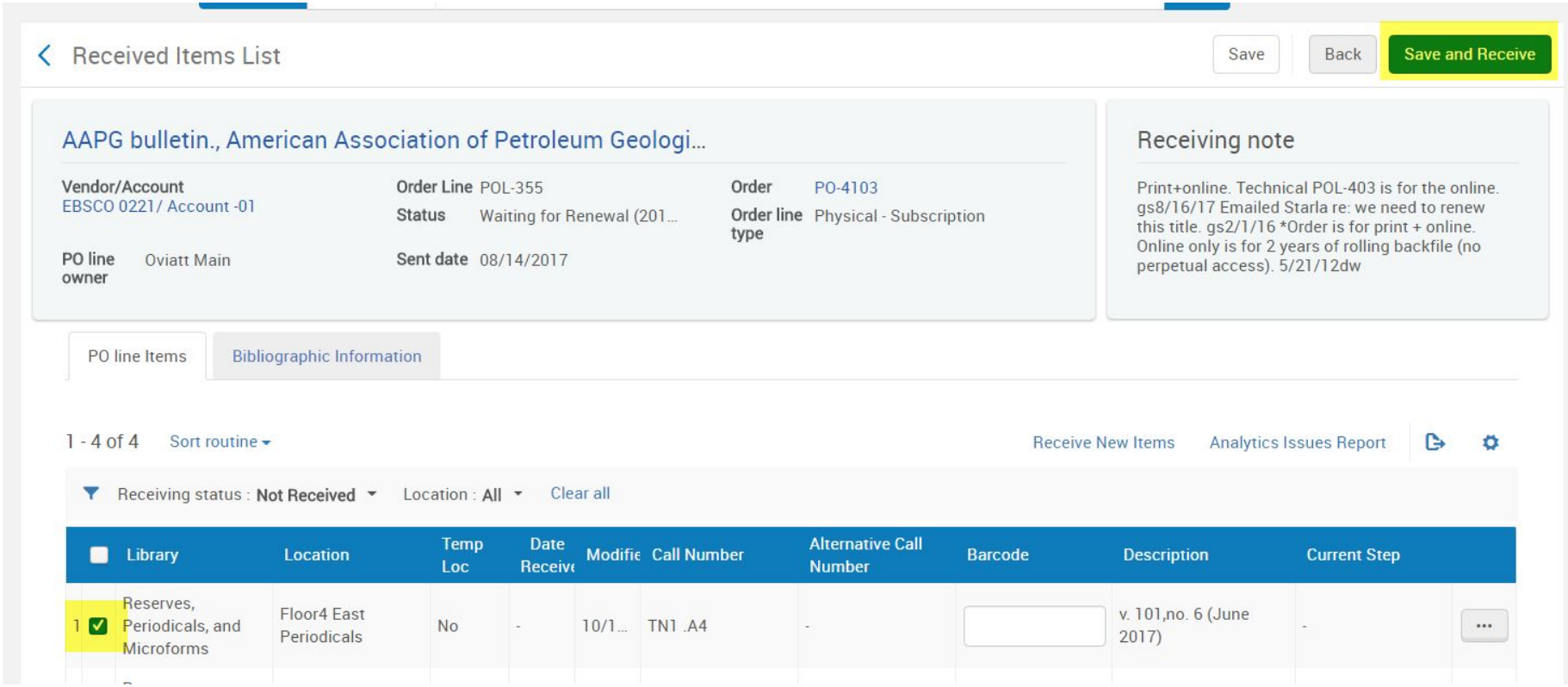
In the Received Items List, it's helpful to filter by Receiving status: Not Received and Sort by the item description field.



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

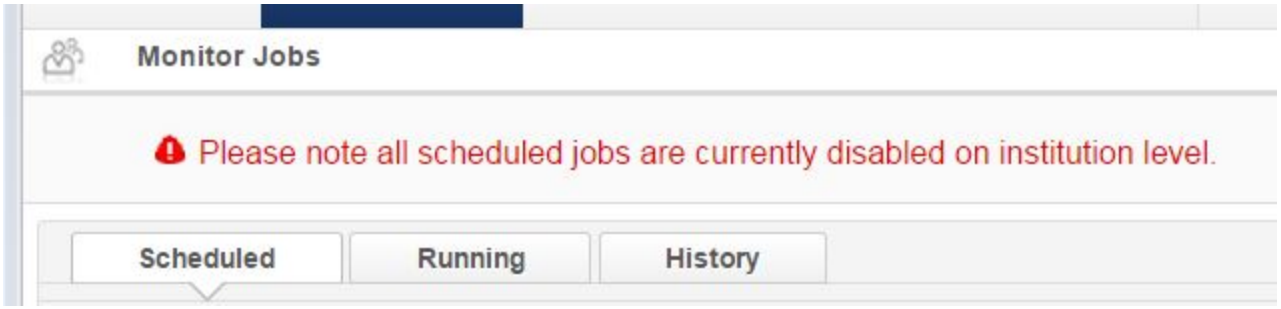


If the item does not have a barcode you can check the issue received and click on Save and Receive.


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
Status Waiting for Renewal (201...
Order PO-4103
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 Receiv
Modifie
Call Number
Alternative Call Number
Barcode
Description
Current Step
1
Reserves, Periodicals, and Microforms
Floor4 East Periodicals
No
-
10/1...
TN1 .A4
-
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.

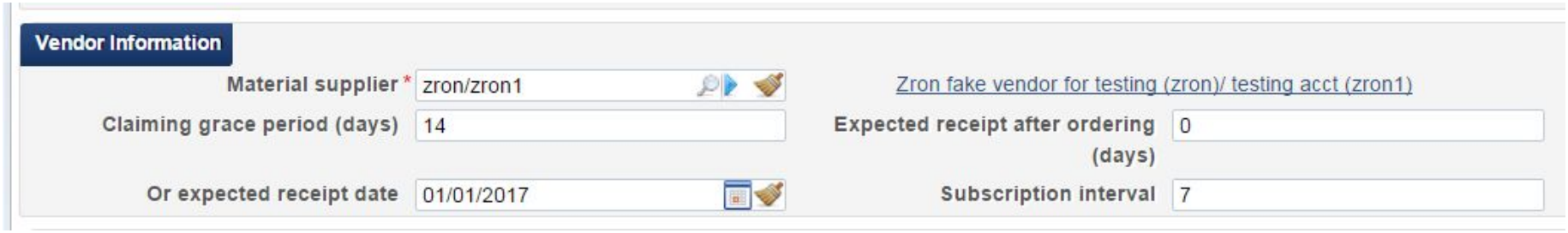
See page 69 of Alma Roadmap Highlights.

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)

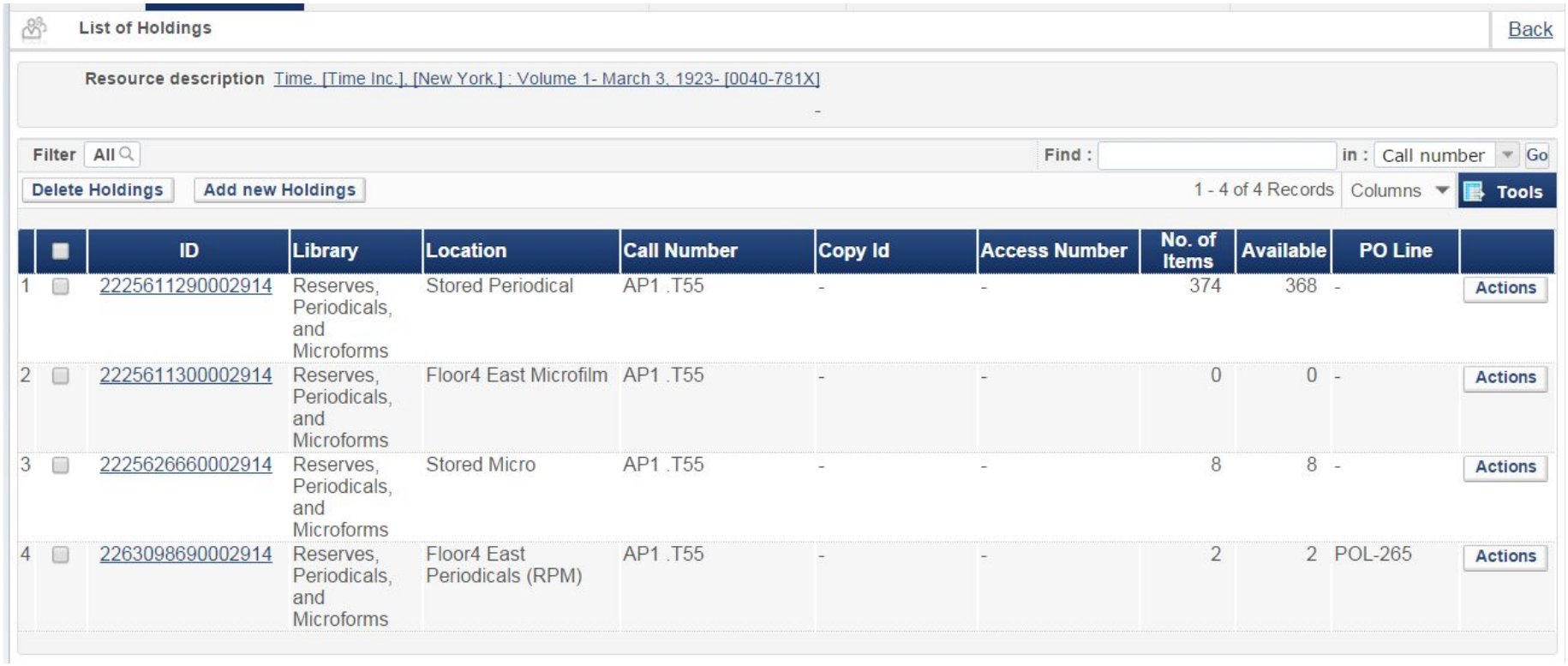
PO Line (POL-265): attached to existing title, assign inventory manually,

Vendor info in POL-265



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 All

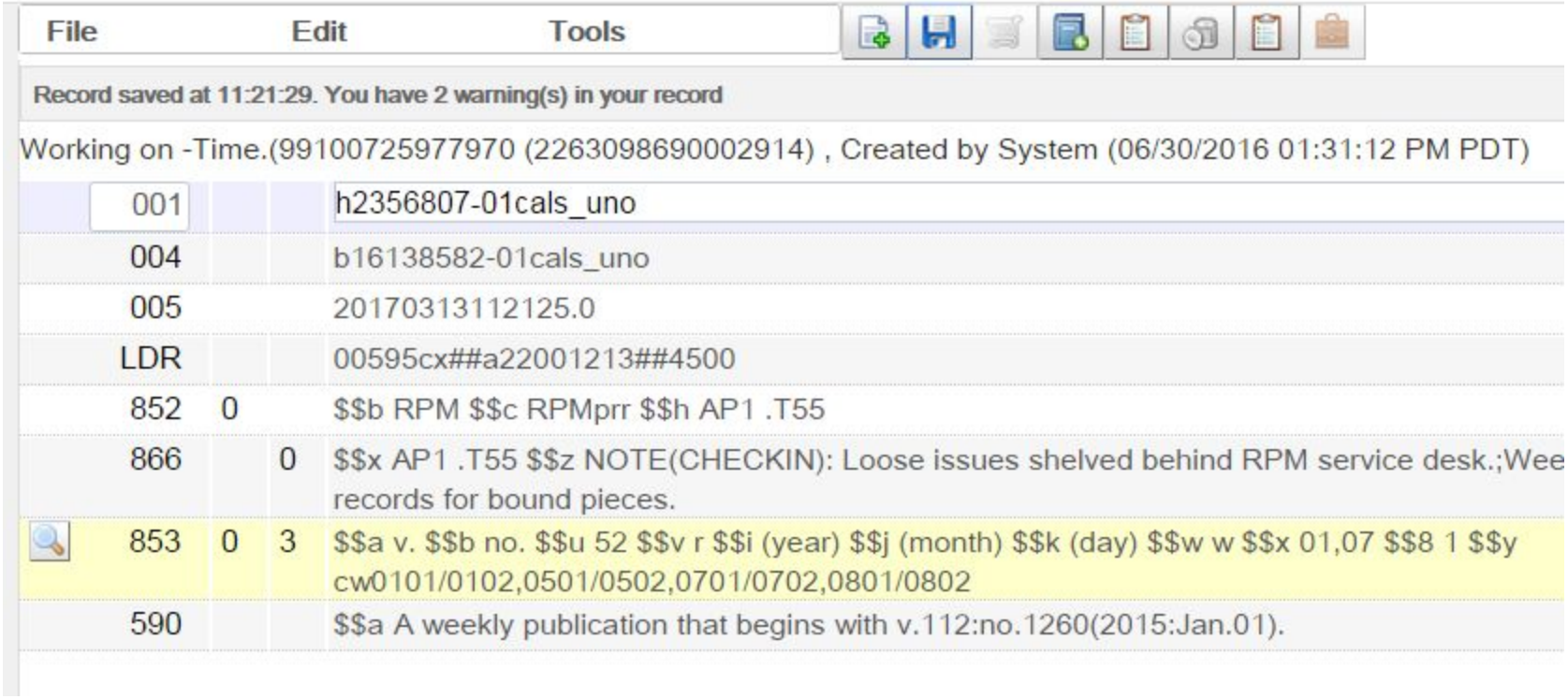
Find : in : Call number Go

Delete Holdings Add new Holdings

1 - 4 of 4 Records Columns 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

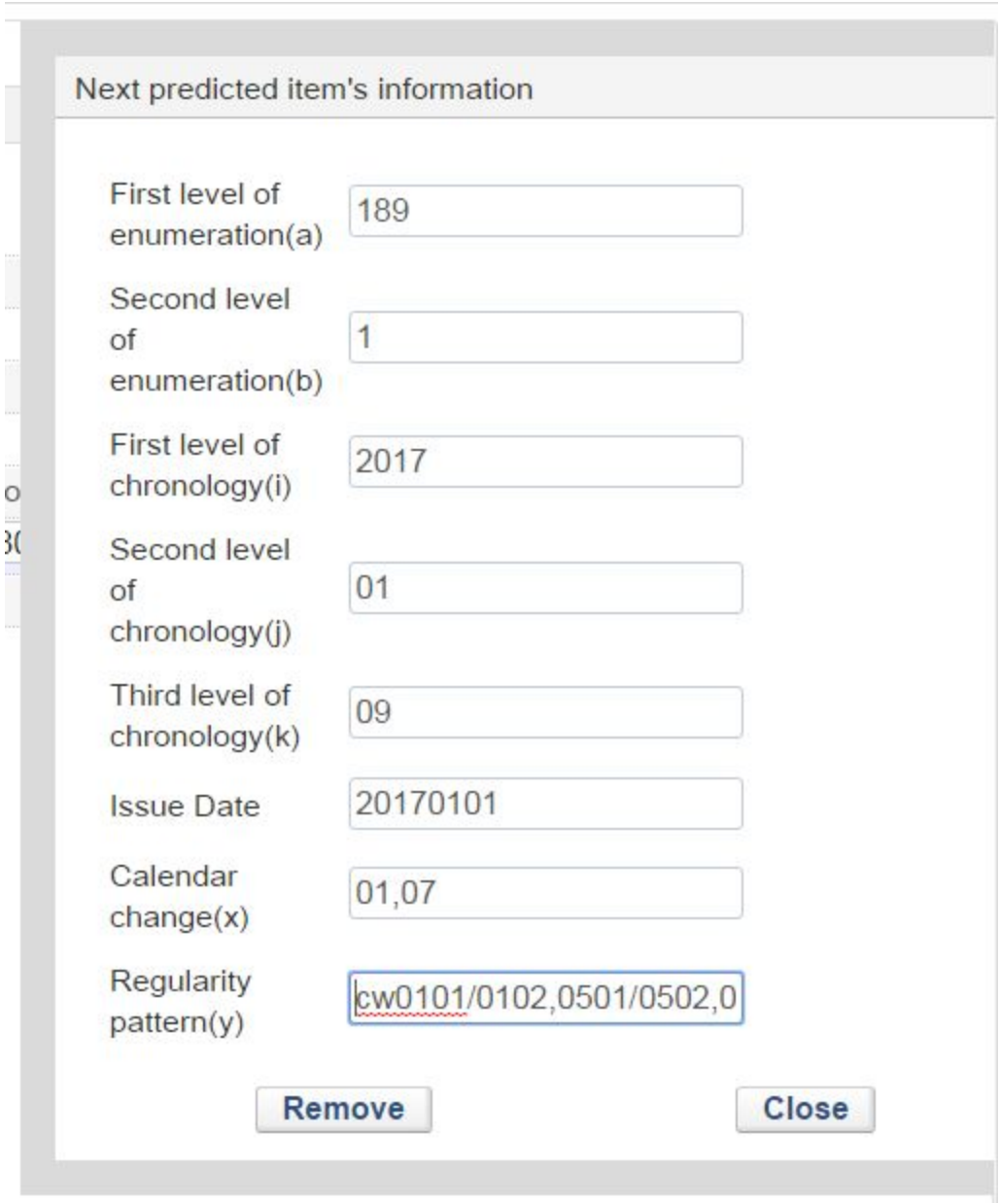
Setup prediction patterns in holdings record using Metadata Editor (853 field)
See http://www.loc.gov/marc/holdings/hd853855.html for instructions on inputting 853 and its subfields



$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.)

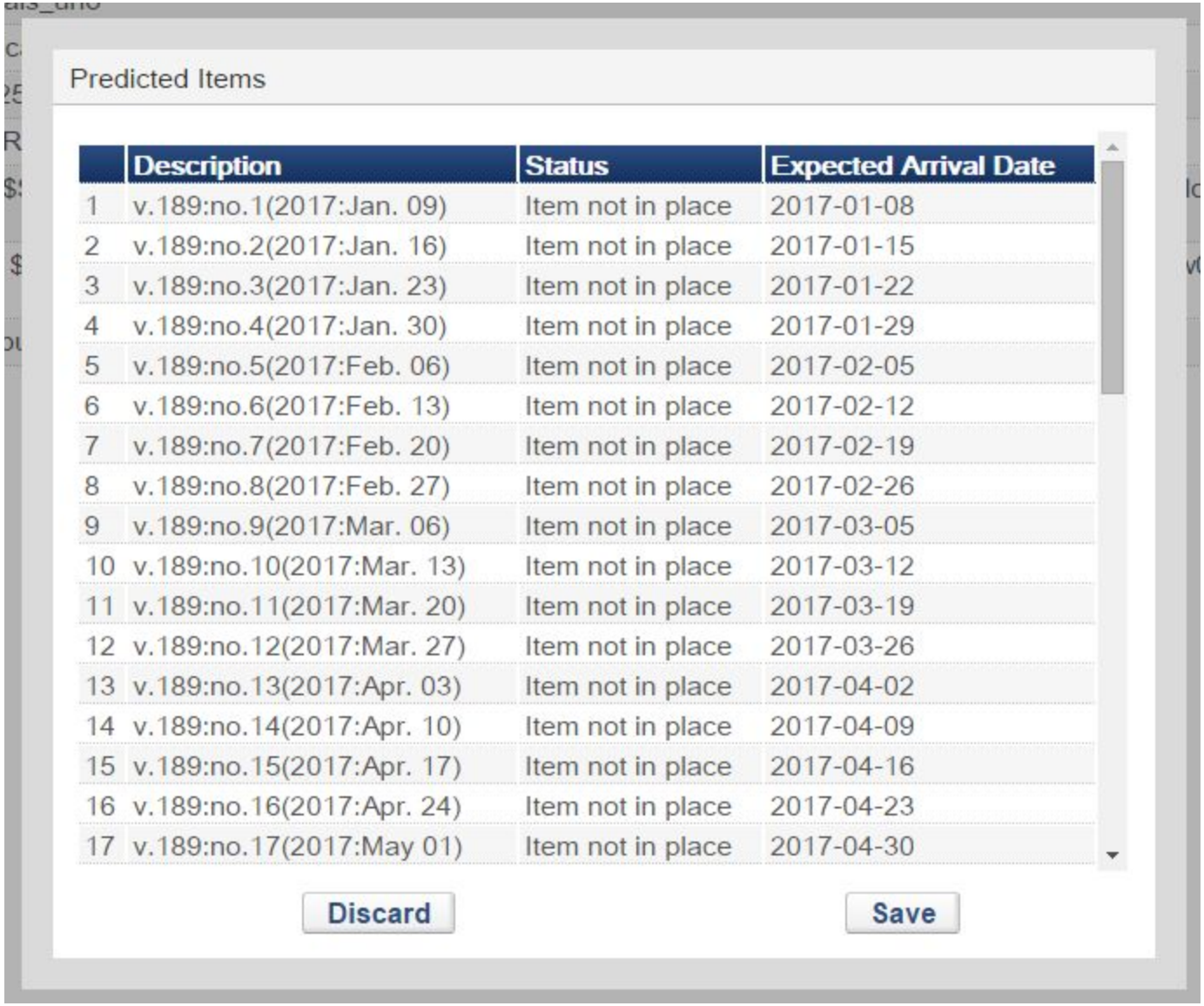


Next predicted item’s info

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)



Predicted Items

	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

Discard Save

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

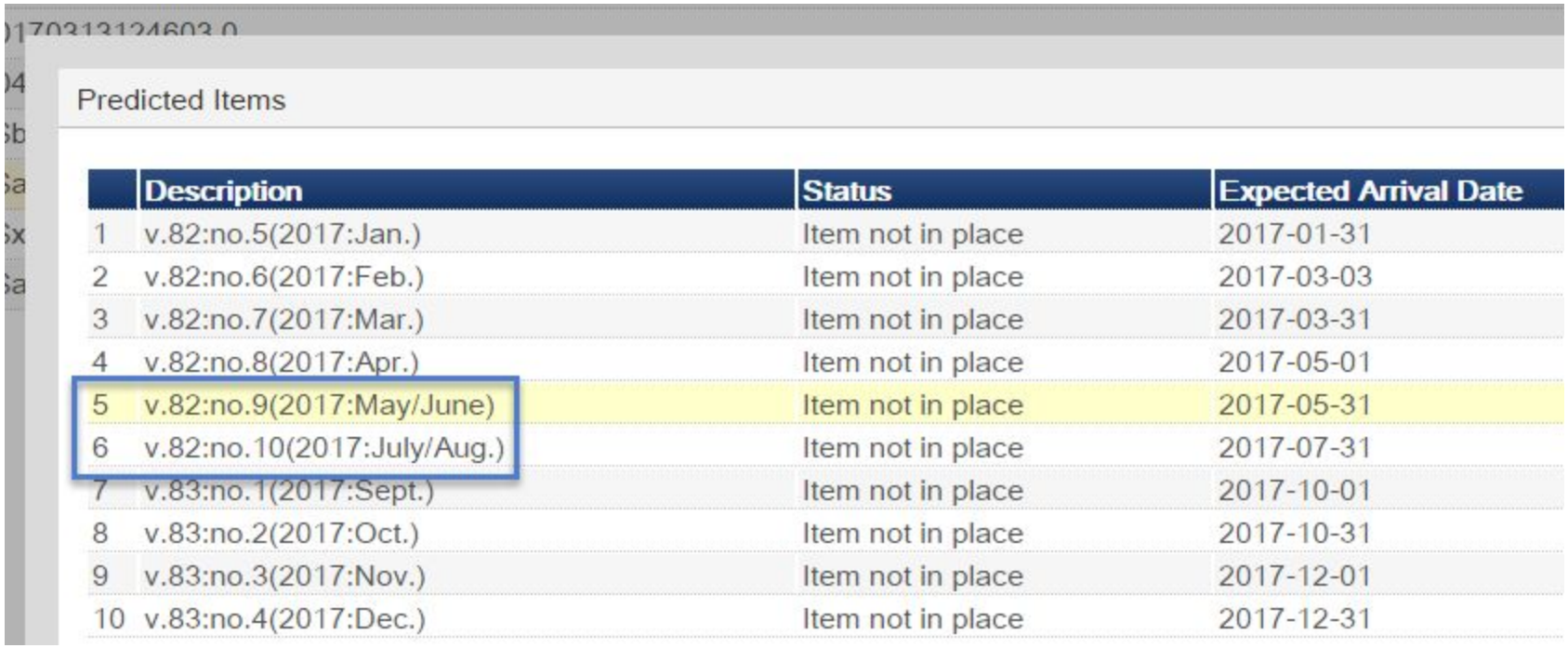
This might not be a problem because based on the past publication pattern of Time, the combining of issues doesn't always follow a regular pattern anyway. The pcc bib record indicates that two weekly issues are combined into one issue in the months of Jan, May, July and Aug. For 2016, there were issues 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 RPMprr $$h L1 .E373
853			$$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/Jun and Jul/Aug are combined issues.)



Predicted Items

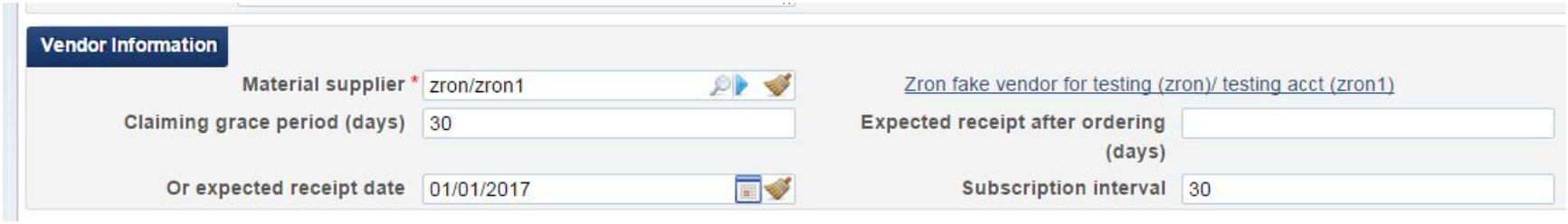
	Description	Status	Expected Arrival Date
1	v.82:no.5(2017:Jan.)	Item not in place	2017-01-31
2	v.82:no.6(2017:Feb.)	Item not in place	2017-03-03
3	v.82:no.7(2017:Mar.)	Item not in place	2017-03-31
4	v.82:no.8(2017:Apr.)	Item not in place	2017-05-01
5	v.82:no.9(2017:May/June)	Item not in place	2017-05-31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

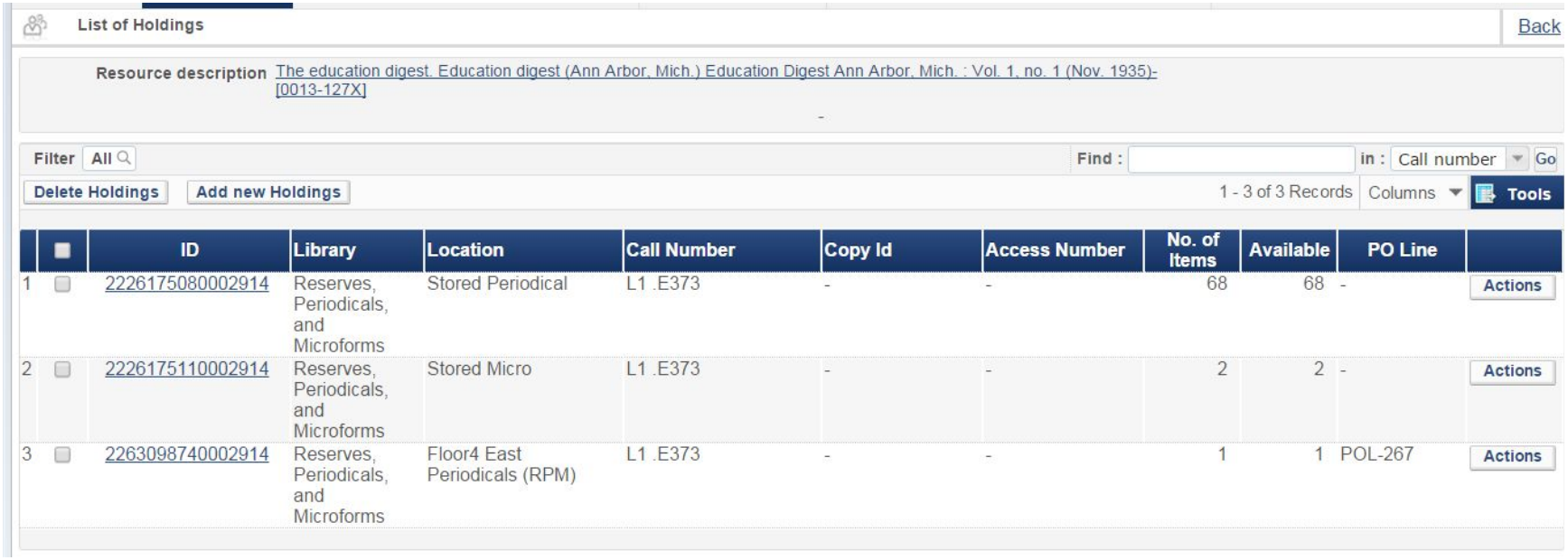
Monthly, some issues omitted

Education digest (oclc 1567544, issn 0013-127x)
Frequency: Monthly (Sept.-May)

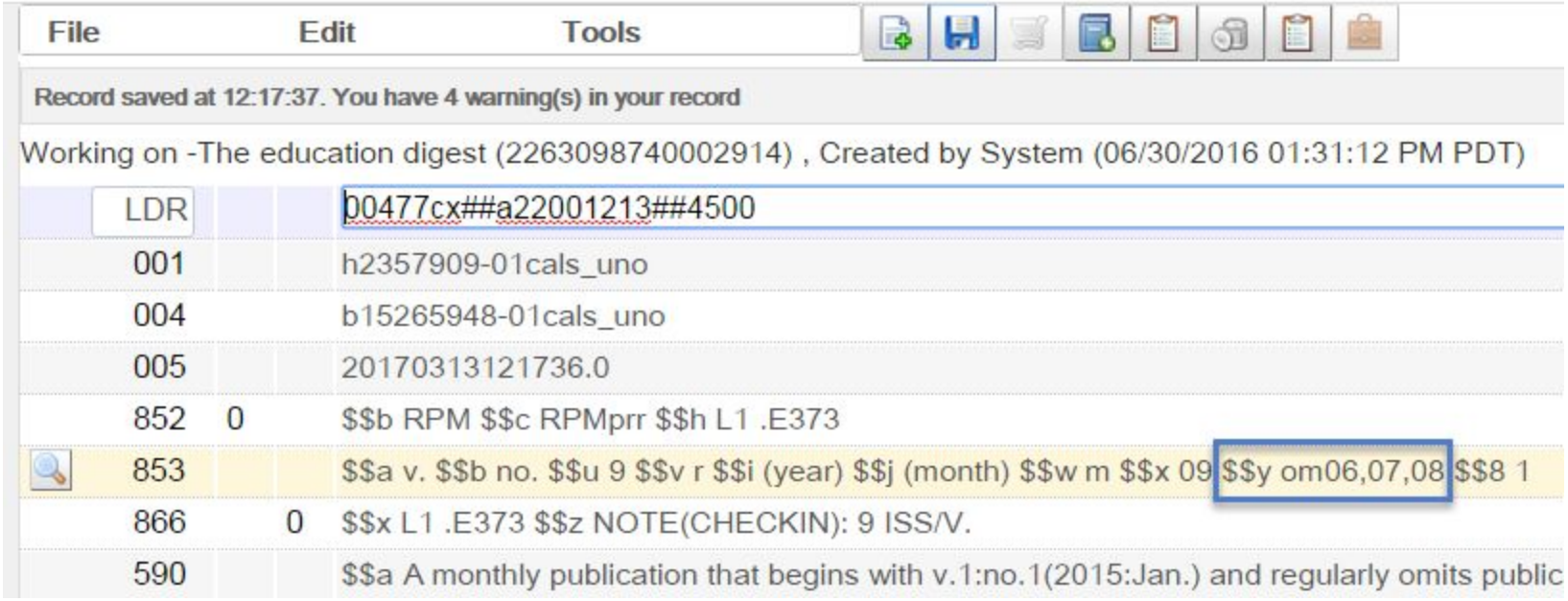
Vendor info POL-267



Linked PO line to holdings record



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



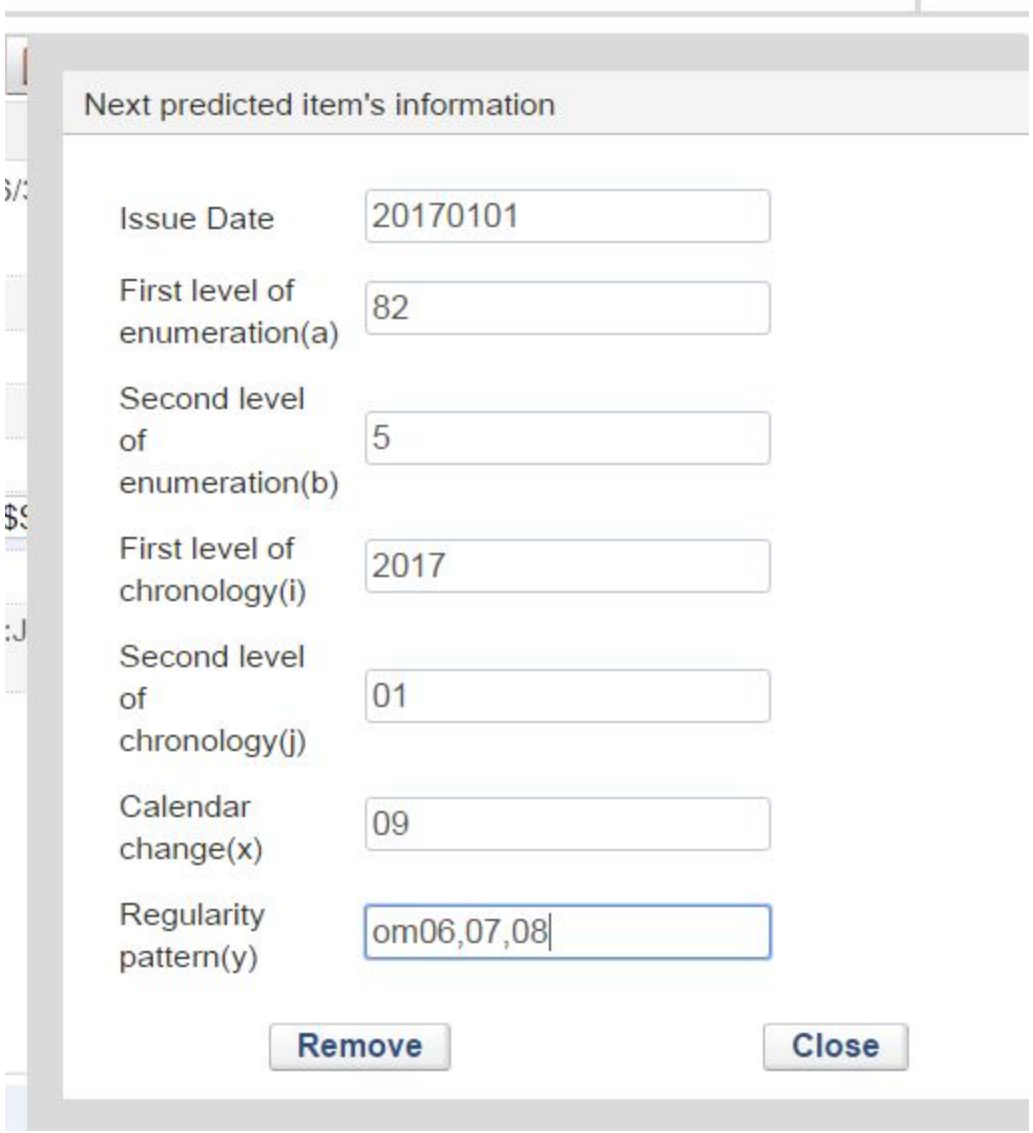
$w m	Publication frequency is monthly.
$x 09	In September the volume number is incremented.

Omitted issues

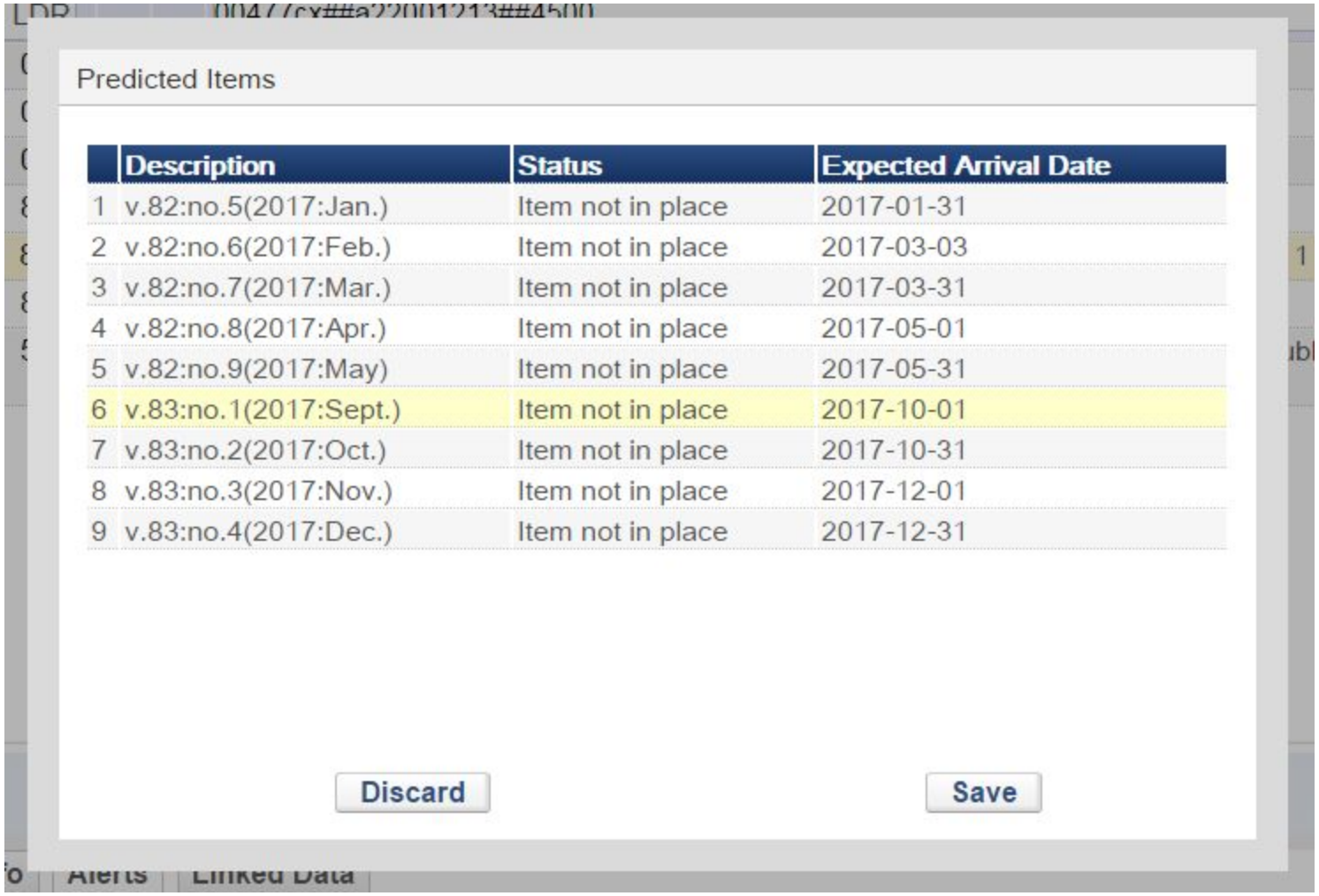
$y om06,07,08	The months of June, July, and Aug are omitted.

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



Predicted items



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

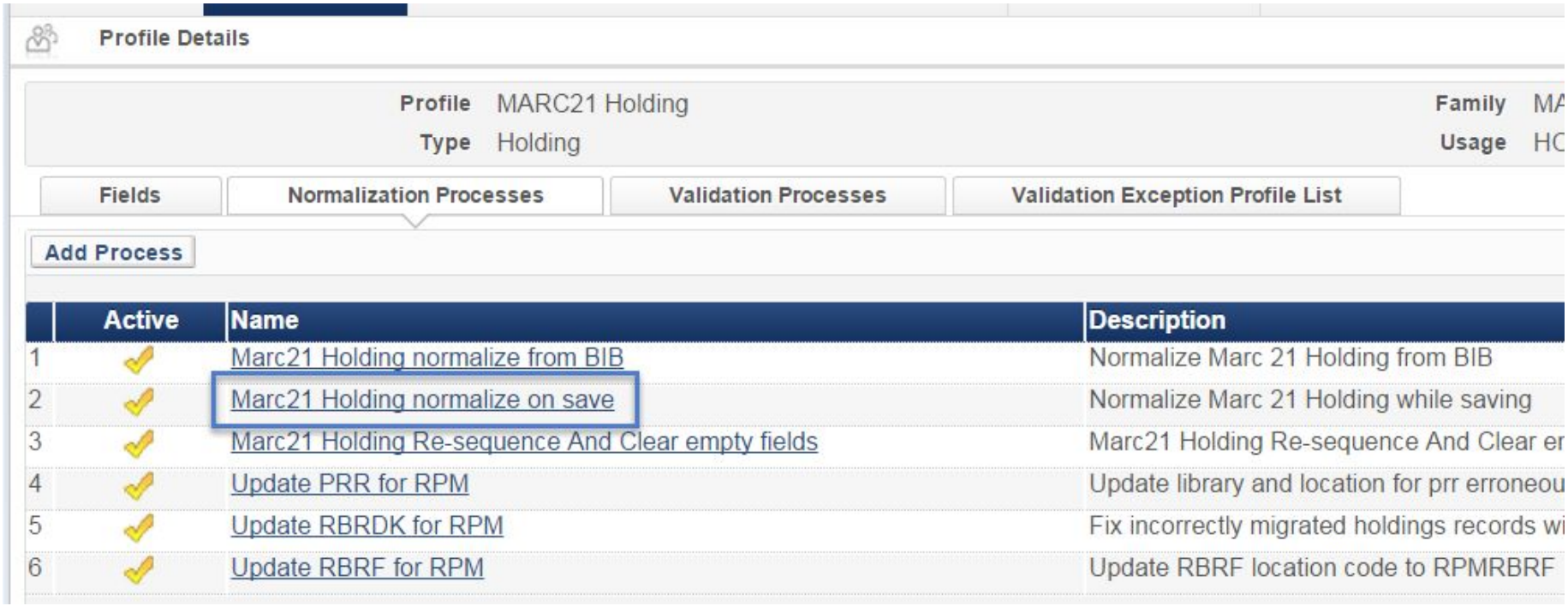
Summary holdings statement (863/866 field)

Creating summary holdings (866) from holdings record (Exlibris presentation)
https://knowledge.exlibrisgroup.com/@api/deki/files/42150/Serials_-_Automation_tasks_for_summary_holdings.pptx

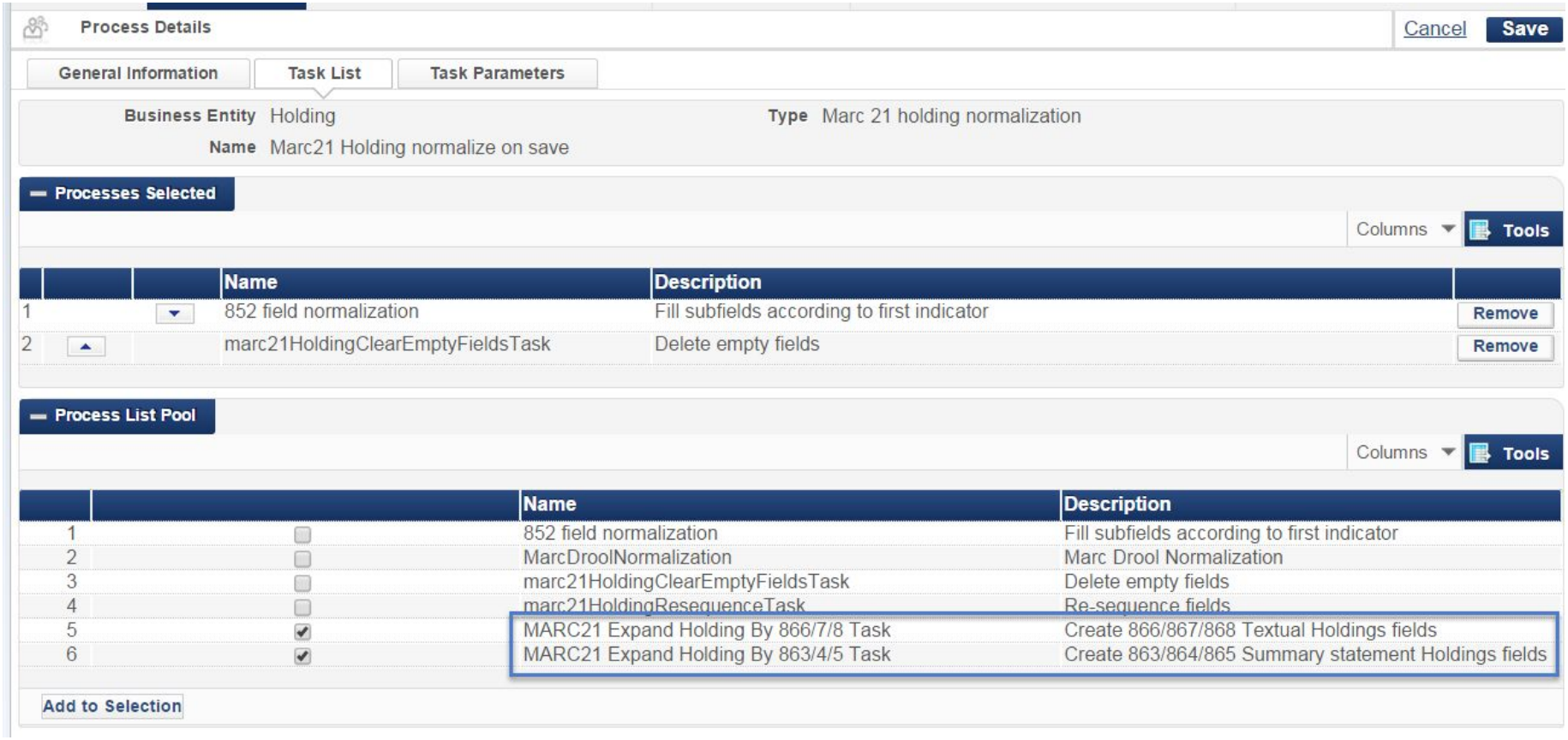
Configuration: Resource management, Resource configuration menu.

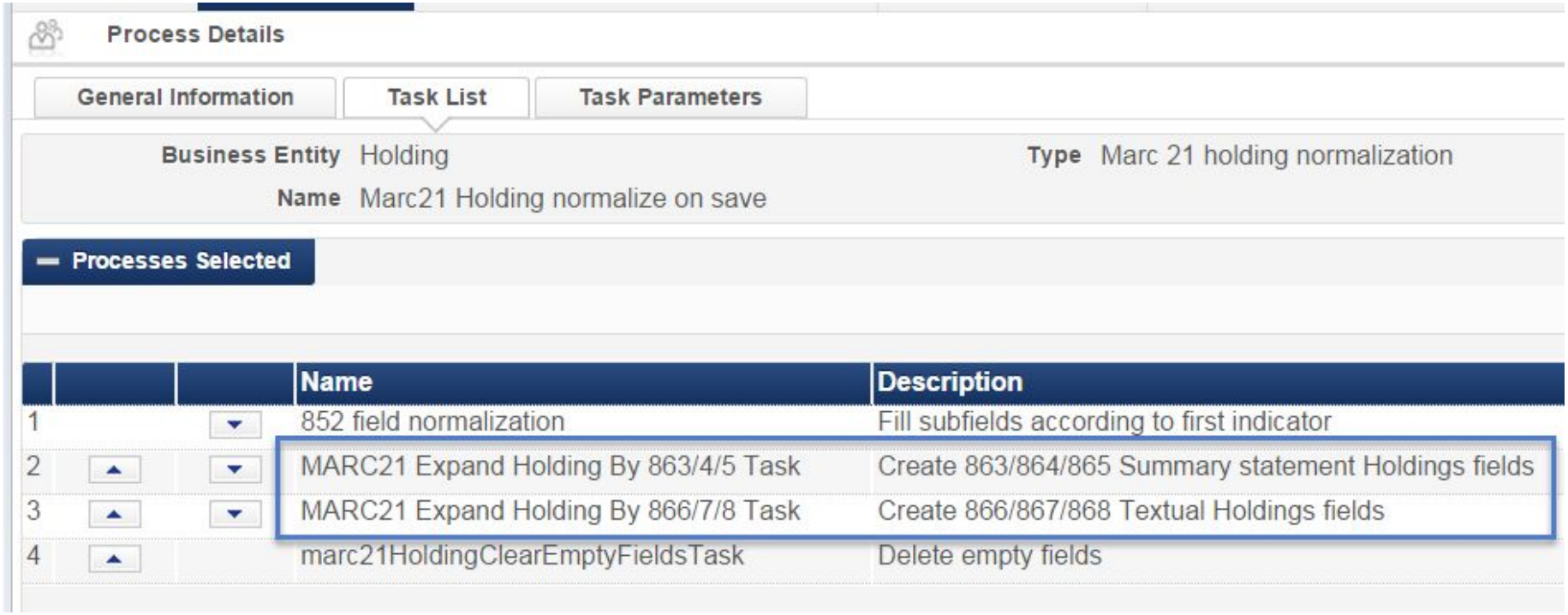
Cataloging, Metadata configuration, Marc21 Holding Profile,

Normalization processes: Marc21 Holding normalize on save



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.



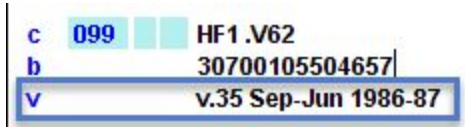


These two processes should add a 863 and 866 field in the holdings record when you save it.

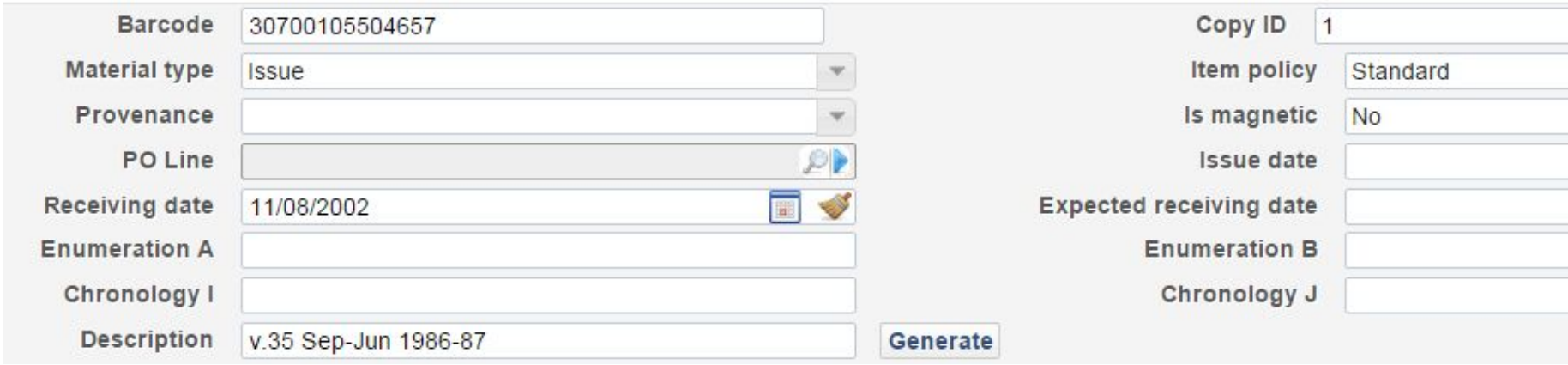
~~A MarcDroolNormalization (i.e. normalization rule) can delete any existing 866 field(s) and re-generates it based on the most recent data in the 863 field. (See slides 6,32-34.)~~

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.))

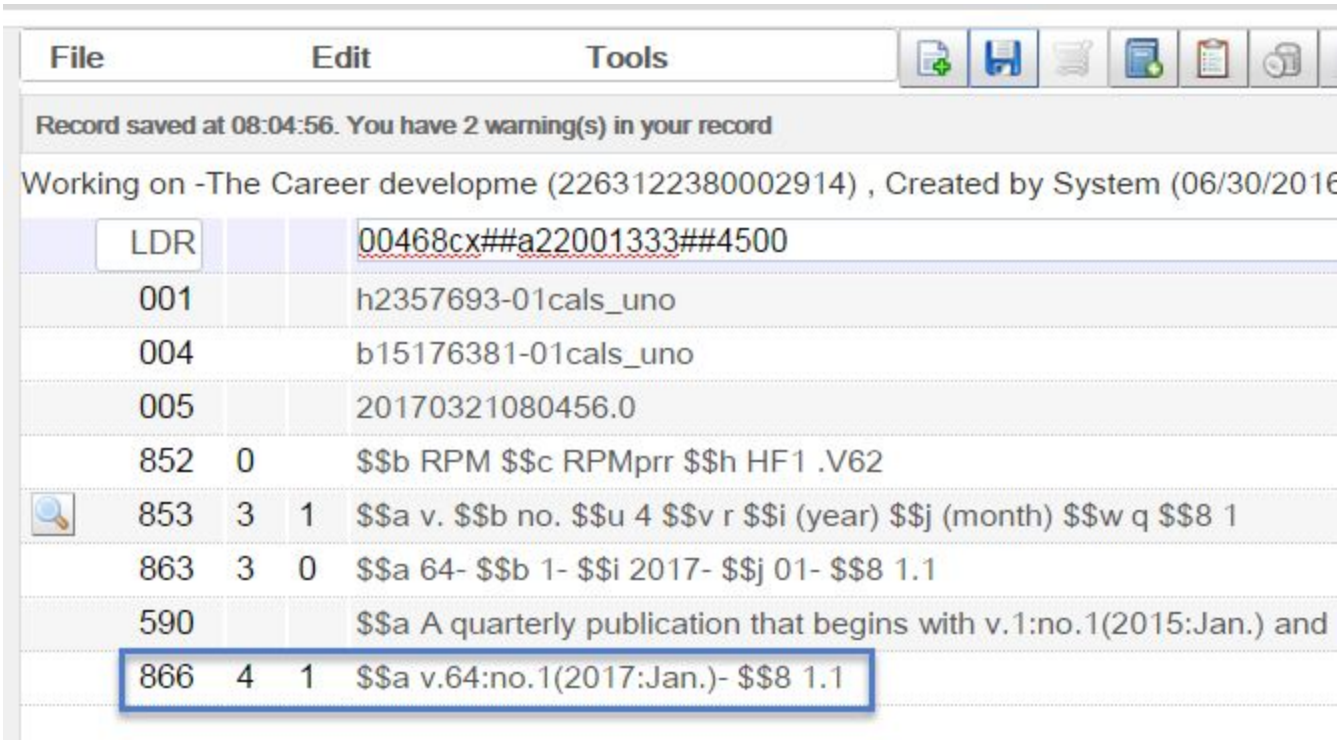
Millennium's item record view



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



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



(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.

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

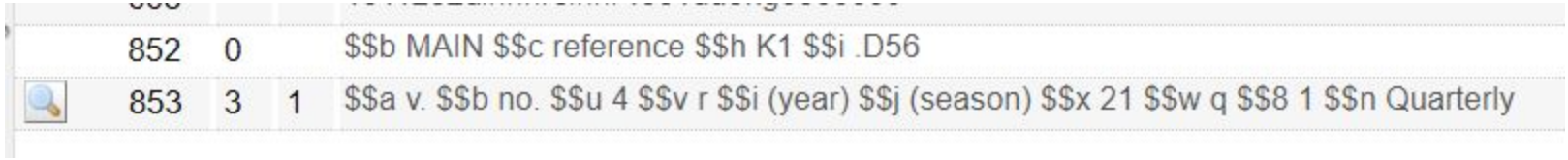
1. U. Conn. Law library, yes use, 1300 titles, time consuming setup (2 staff, 15-20 hours/week for 3 months!), includes best practices
   https://listserv.nd.edu/cgi-bin/wa?A2=ALMA-L;e8d987f4.1606

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

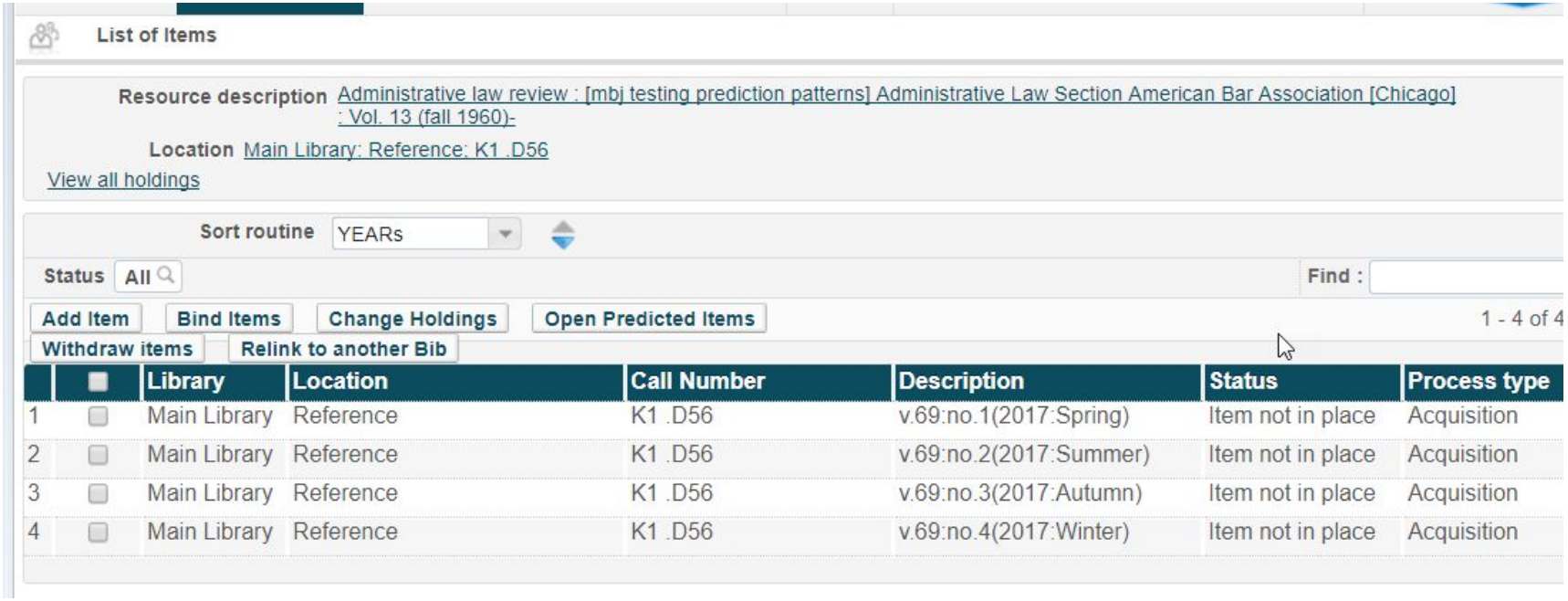
The following testing was done in the Sandbox to test how an institution might handle changes to prediction patterns (such as changes in frequency, and/or numbering). I created a fake bib record for Administrative law review in the Sandbox, created and linked a PO line to it and set up a quarterly prediction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



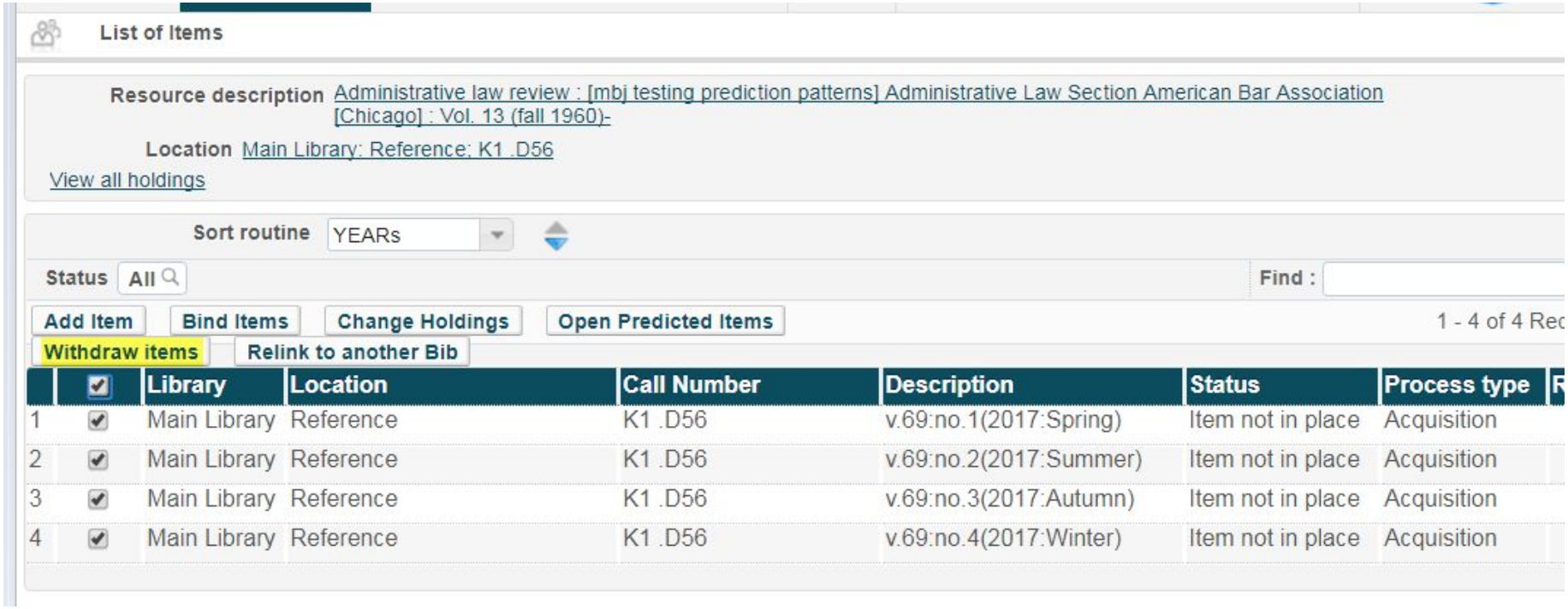
$$a v. $$b no. $$u 4 $$v r $$i (year) $$j (season) $$w q $$x 21 $$8 1 $$n Quarterly ($n is optional. I only added to easily distinguish between 853 fields)

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:



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



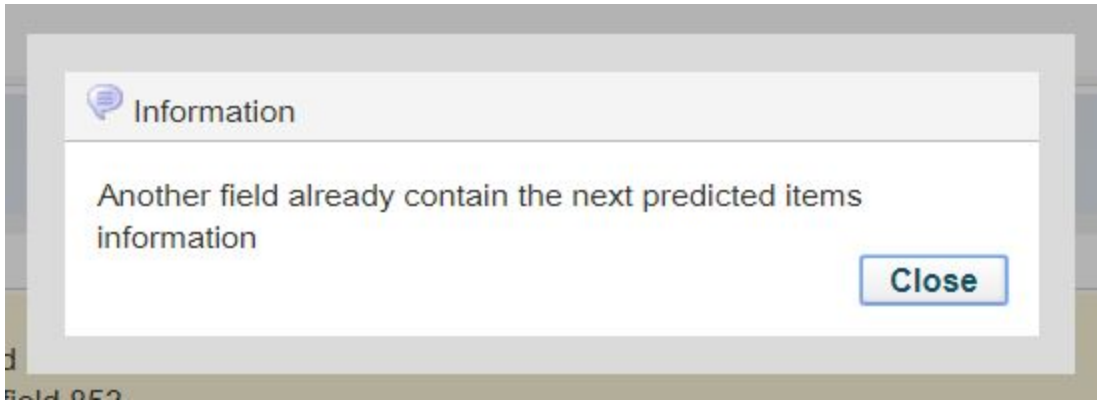
		Library	Location	Call Number	Description	Status	Process type
1	☑	Main Library	Reference	K1 .D56	v.69:no.1(2017:Spring)	Item not in place	Acquisition
2	☑	Main Library	Reference	K1 .D56	v.69:no.2(2017:Summer)	Item not in place	Acquisition
3	☑	Main Library	Reference	K1 .D56	v.69:no.3(2017:Autumn)	Item not in place	Acquisition
4	☑	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.

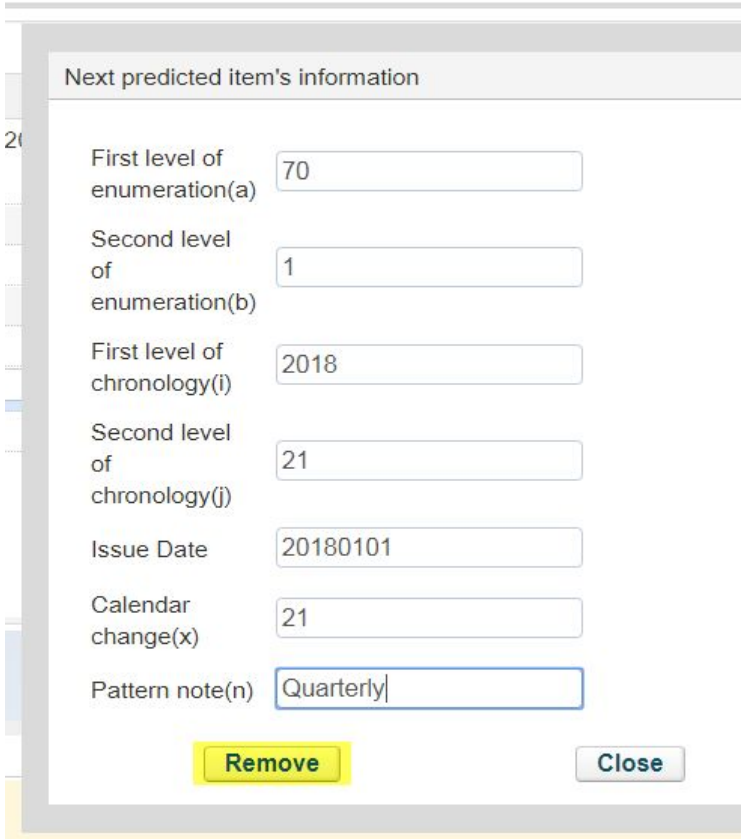
853	3	1	$$a v. $$b no. $$u 4 $$v r $$i (year) $$j (season) $$w q $$x 21 $$8 1 $$n Quarterly
853	3	1	$$a no. $$u 12 $$v c $$i (year) $$j (season) $$w m $$x 01 $$8 2 $$n Monthly

$$a no. $$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)

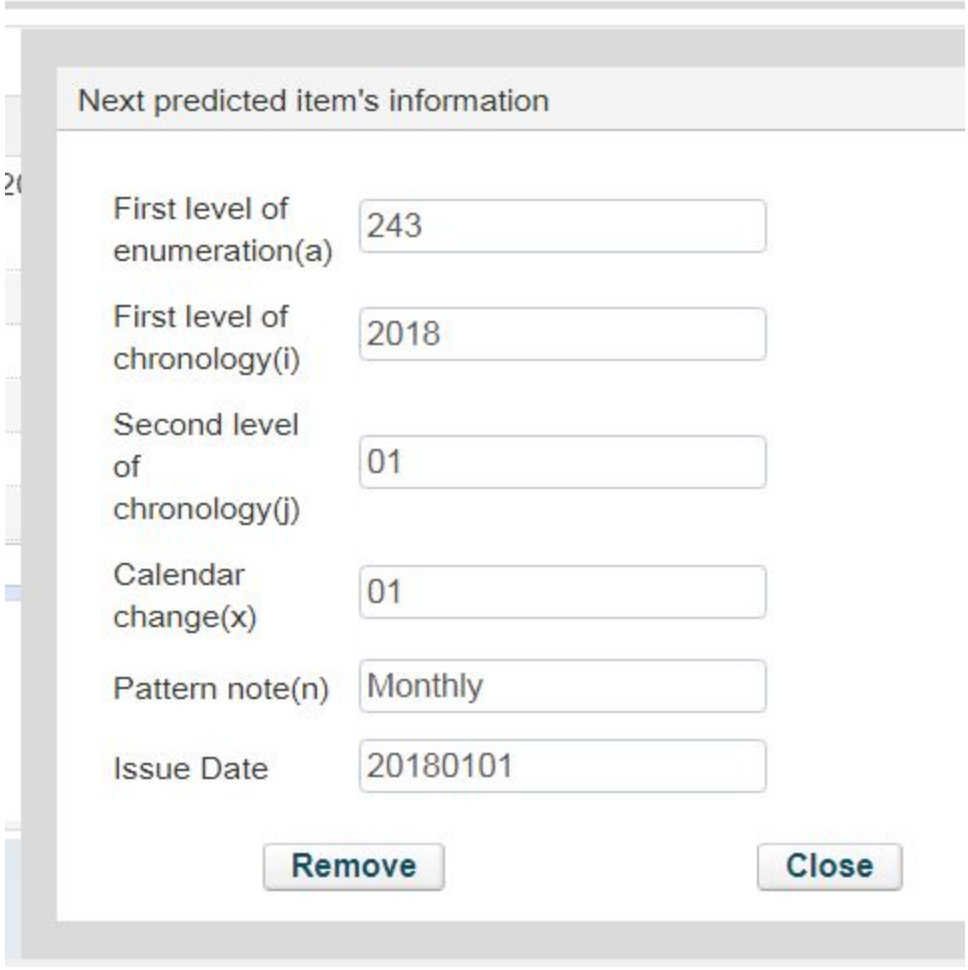
If I try to enter the next predicted item's information (F3) for the second 853 field I get an error message:



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



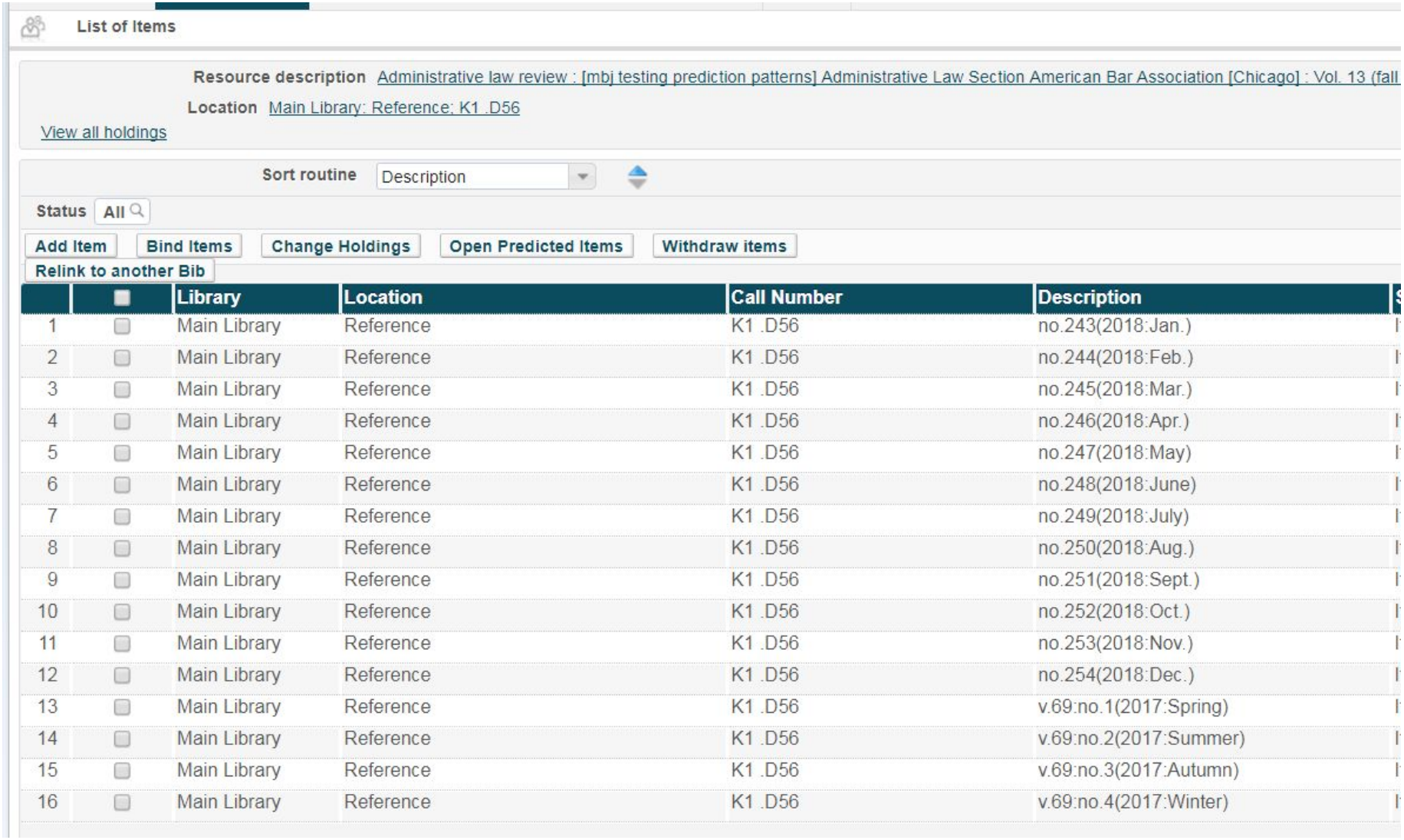
And when I do, I can add the next predicted item info for the second 853 ($8 2) field. (I made up the first level of enumeration as 243.)


Next predicted item's information
First level of enumeration(a)
243
First level of chronology(i)
2018
Second level of chronology(j)
01
Calendar change(x)
01
Pattern note(n)
Monthly
Issue Date
20180101
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 Description

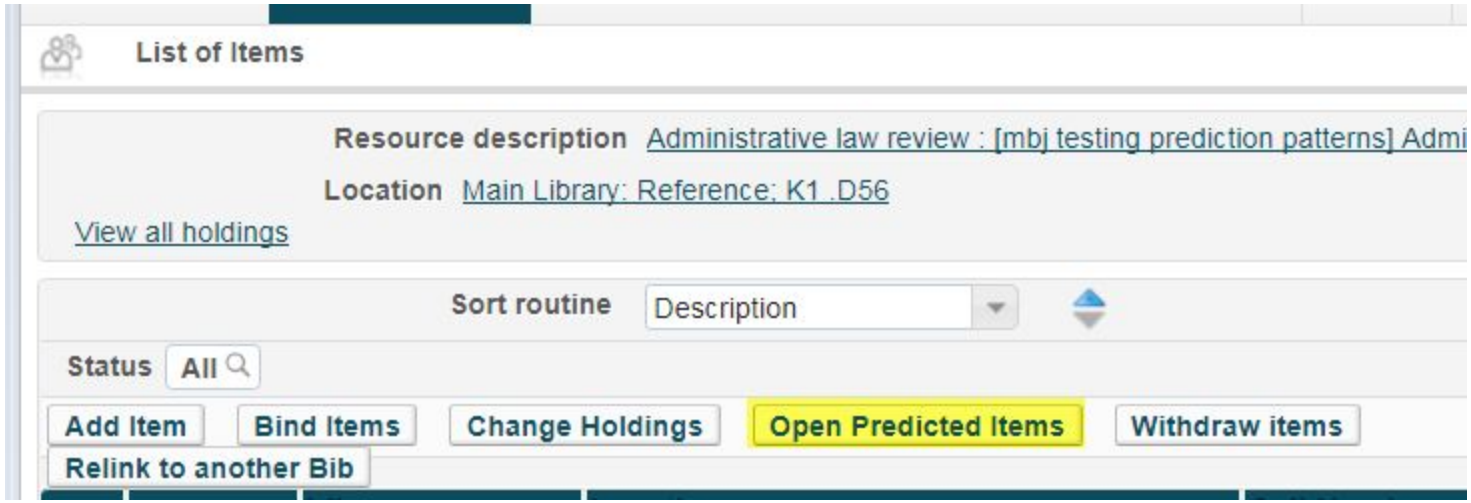
Status All

Add Item | Bind Items | Change Holdings | Open Predicted Items | Withdraw items | Relink to another Bib

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



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

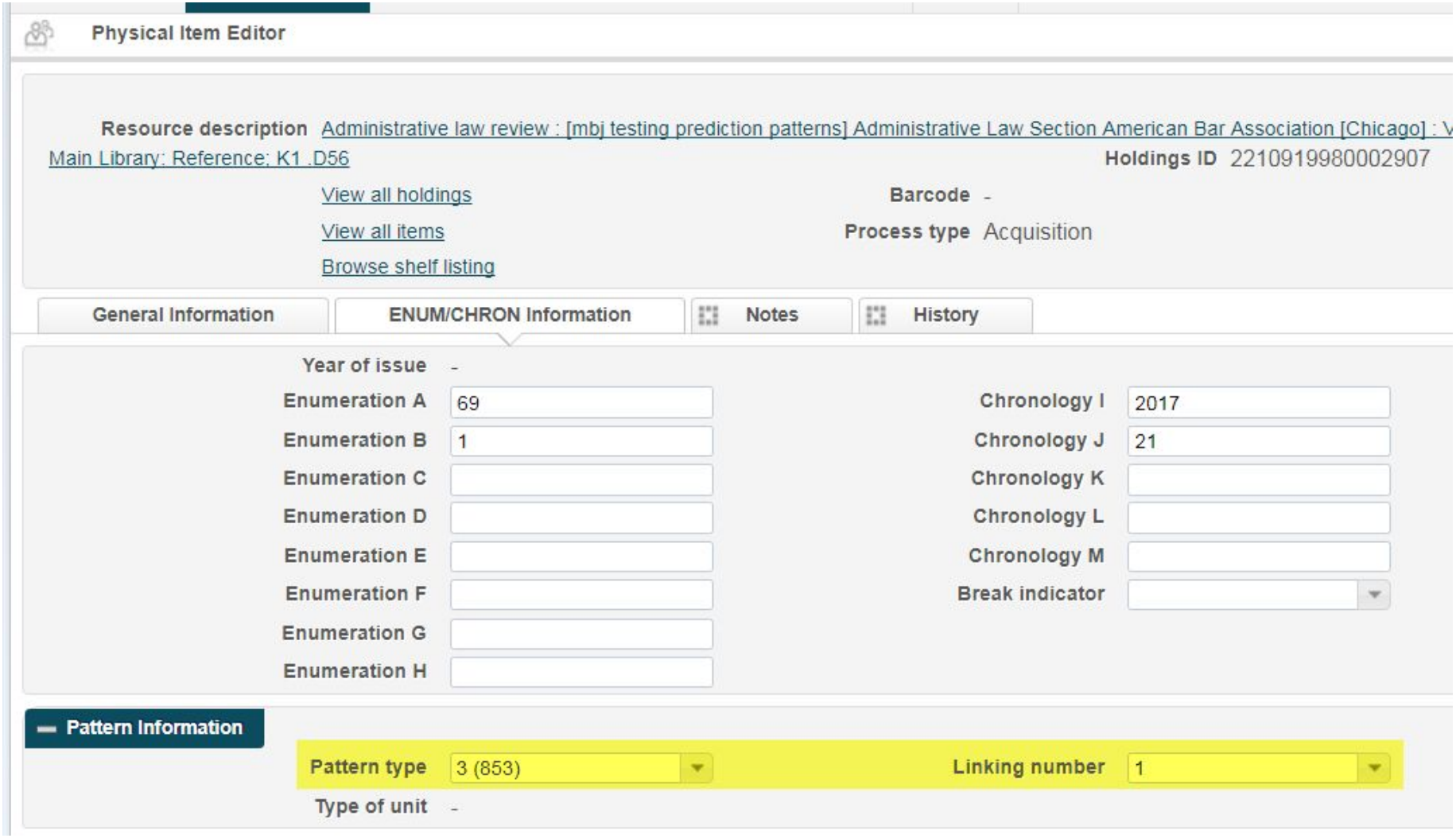
Alma can automatically generate 866 fields for each 863 field. See section above.

The 866 fields display in Primo.

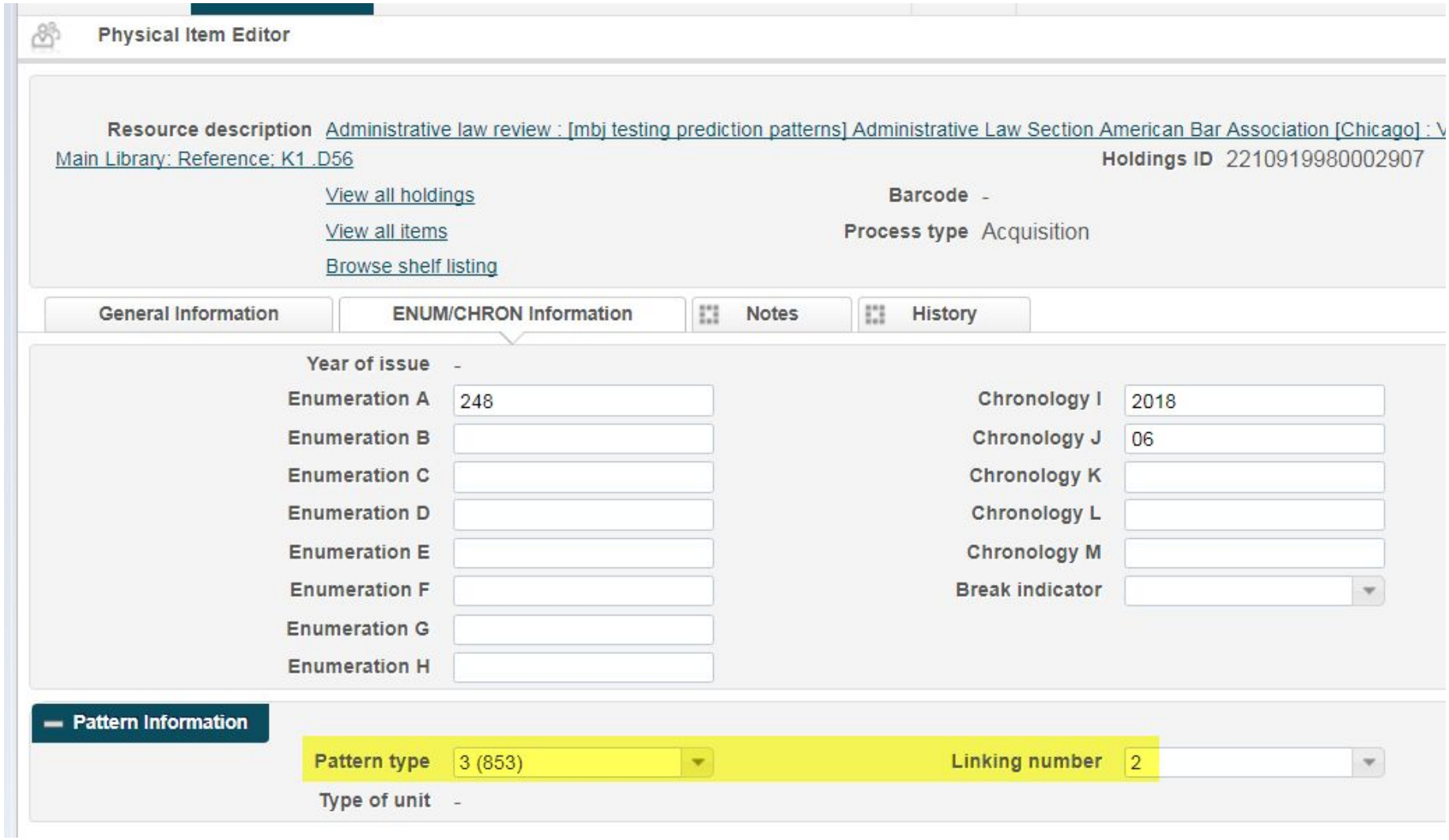
866	3	1	$$a v.13(1960)-v.69(2017); $$8 1.1
866	3	1	$$a no.243(2018)- $$8 2.1
863	3	0	$$a 13-69 $$i 1960-2017 $$w n $$8 1.1
863	3	0	$$a 243- $$i 2018- $$8 2.1

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:



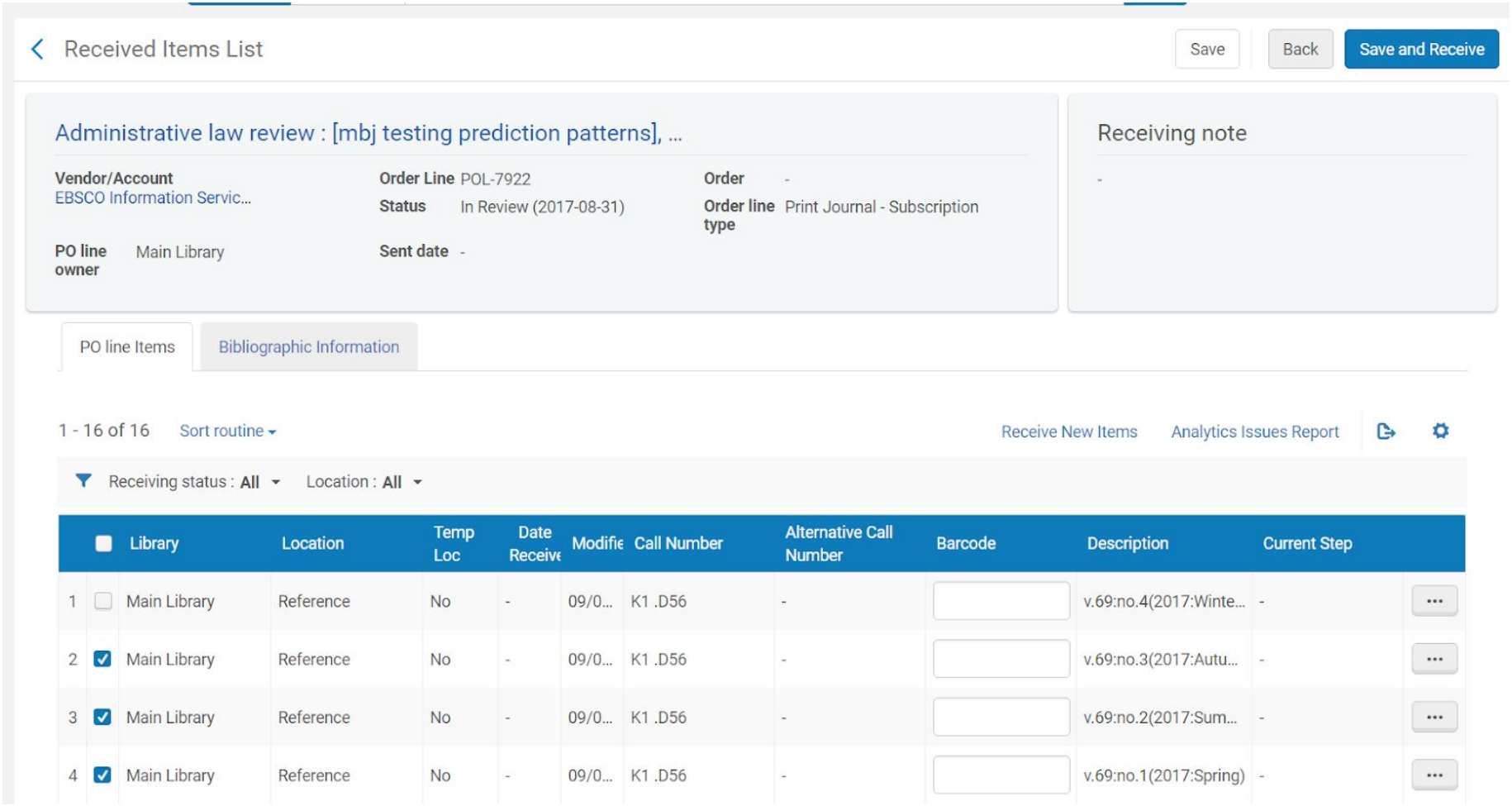
This item record was created from the first (linking number 1) 853 field.



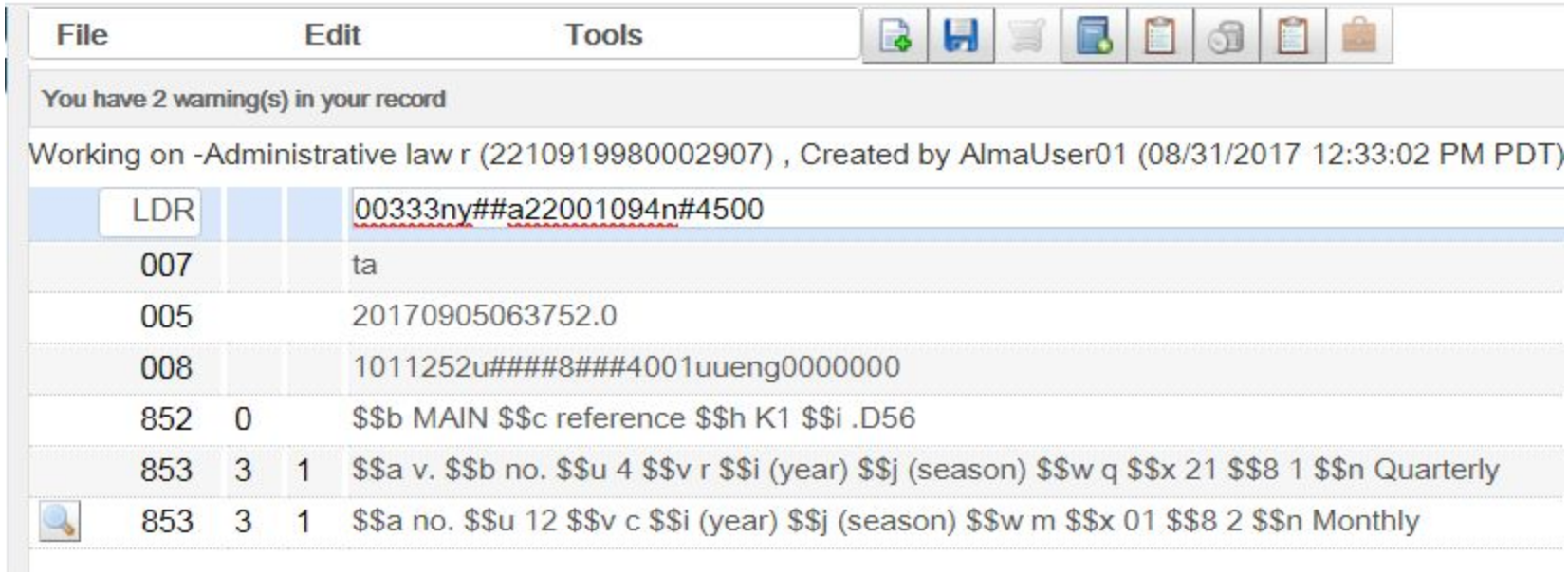
And this item was created from the second (linking number 2) 853 field.

After issues are received,

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



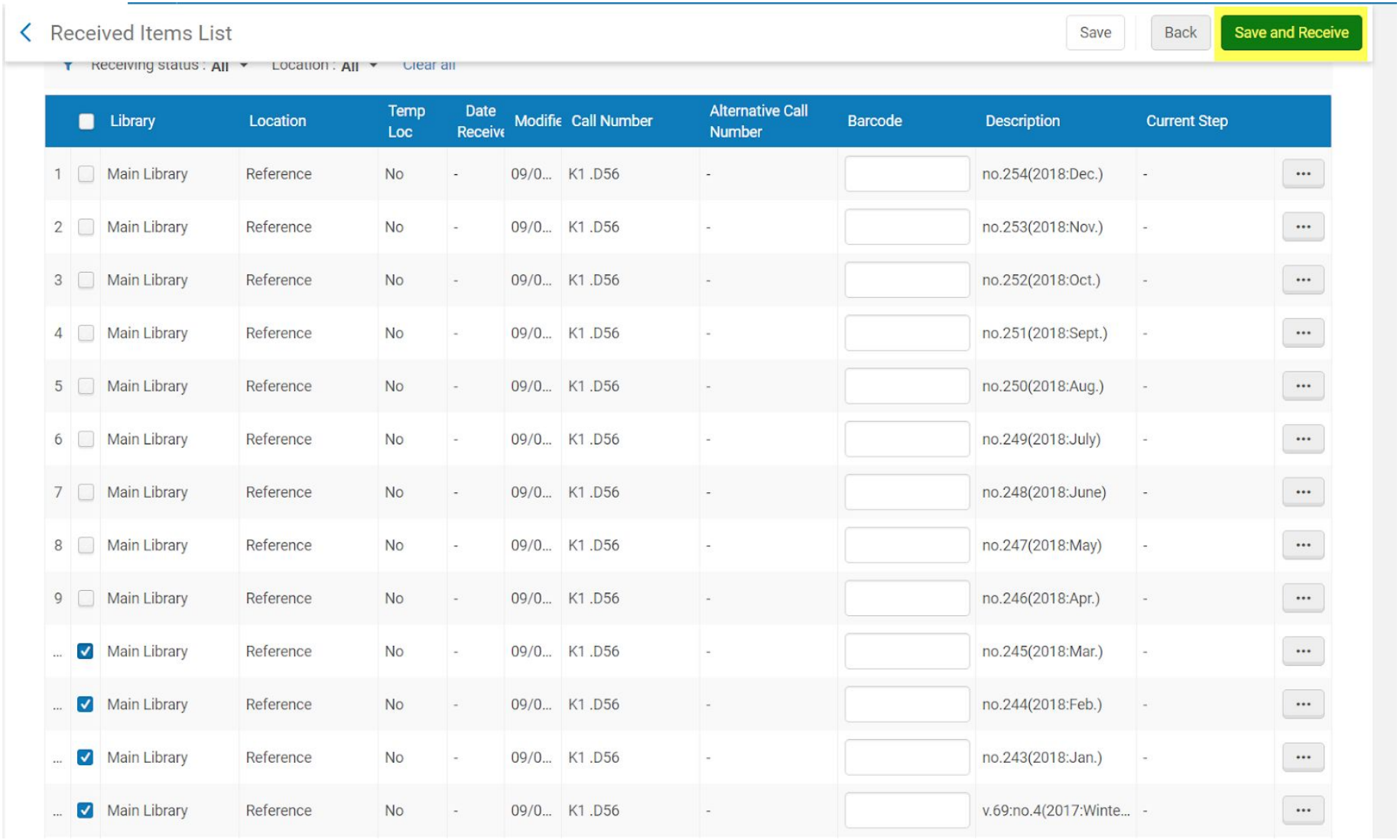
If I open the holdings record in Metadata Editor and save,



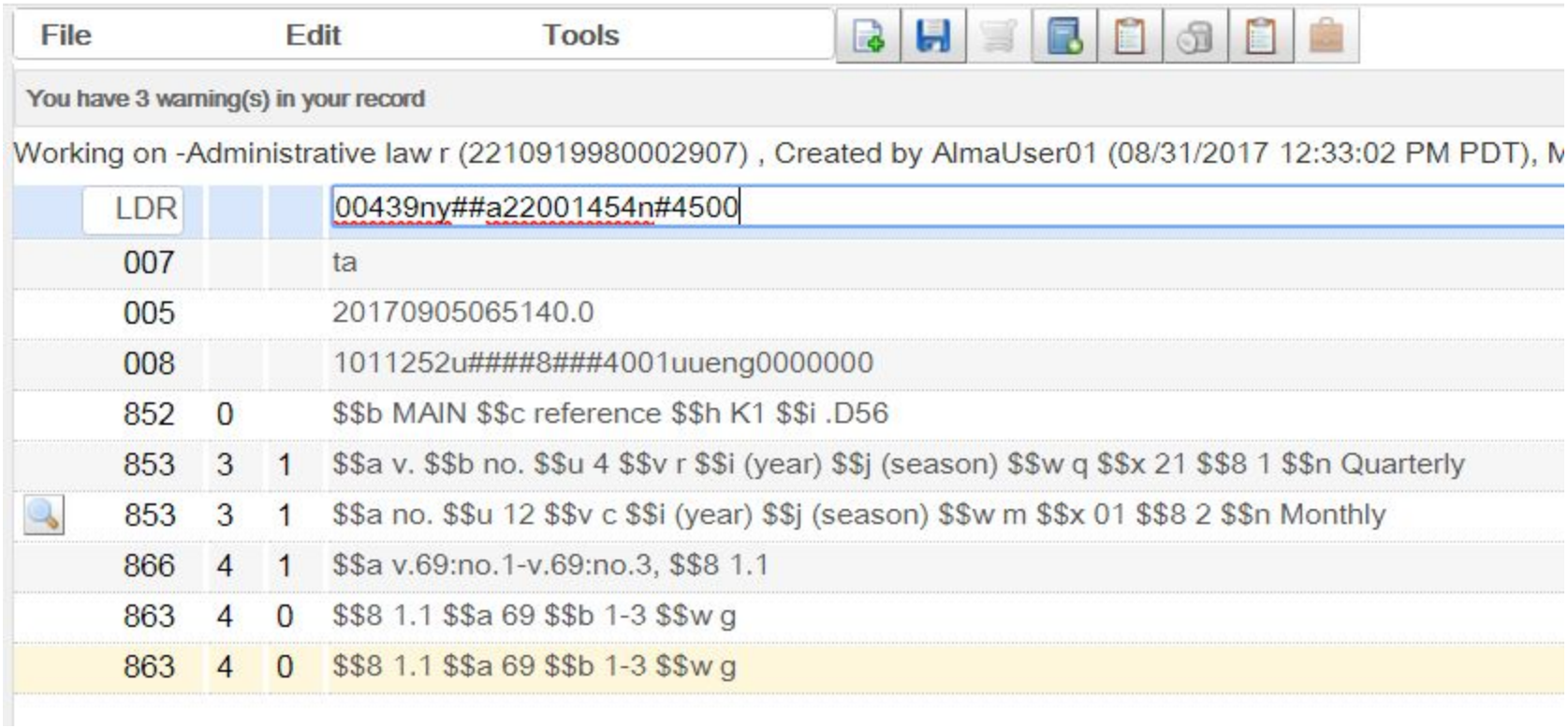
Alma can automatically generate the 863 and 866 field. (I don't know why it generated two 863 fields.)

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,



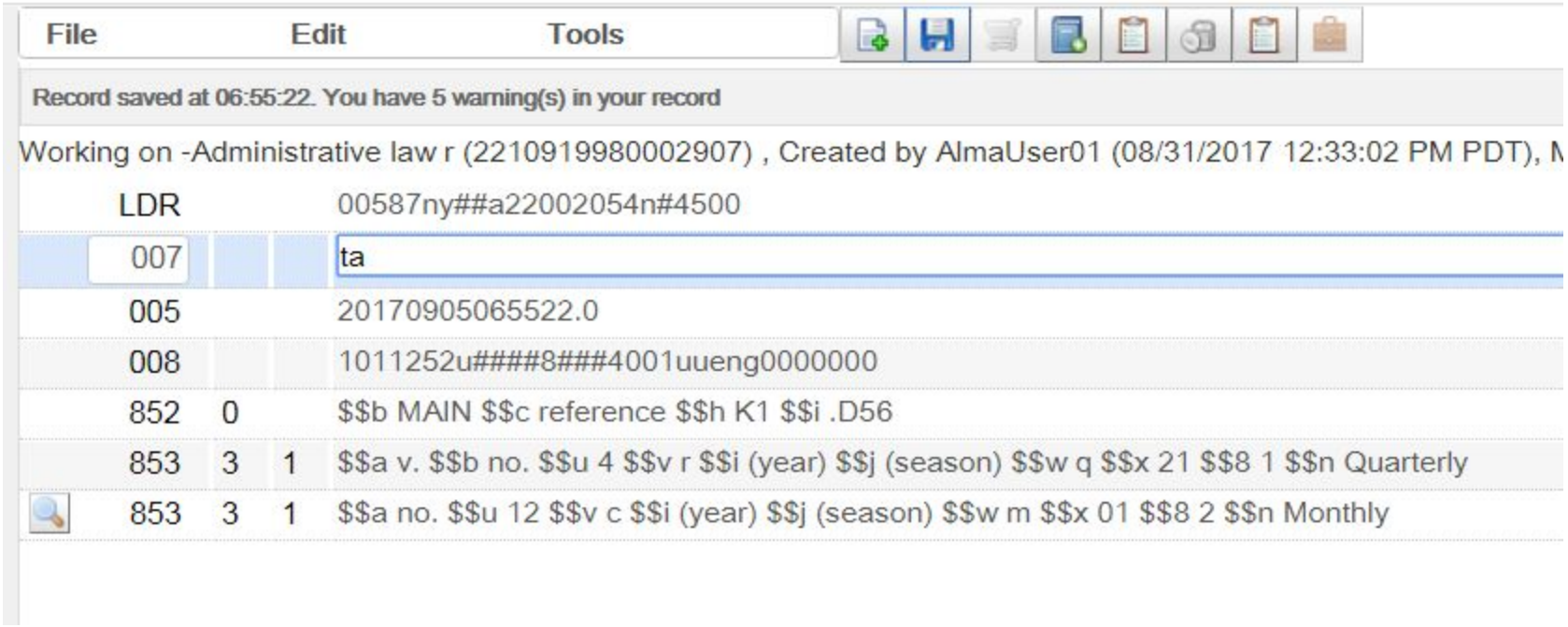
And return to the holdings record and save it



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

866	4	1	$$a v.69:no.1-v.69:no.3, $$8 1.1
866	3	1	$$a no.243-no.245, $$8 2.1
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
863	4	0	$$8 1.1 $$a 69
863	4	0	$$8 2.1 $$a 243-245 $$w g
863	4	0	$$8 1.1 $$a 69
863	4	0	$$8 2.1 $$a 243-245 $$w g

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



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

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 $$n Monthly
866	3	1	$$a v.69 $$8 1.1
866	3	1	$$a no.243-no.245, $$8 2.1
863	4	0	$$8 1.1 $$a 69
863	4	0	$$8 2.1 $$a 243-245 $$w 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	$$a v.69 $$8 1.1
866	3	1	$$a no.243-no.245, $$8 2.1
863	4	0	$$8 1.1 $$a 69
863	4	0	$$8 2.1 $$a 243-245 $$w g
863	4	0	$$8 1.1 $$a 69
863	4	0	$$8 2.1 $$a 243-245 $$w g
863	4	0	$$8 1.1 $$a 69
863	4	0	$$8 2.1 $$a 243-245 $$w g
863	4	0	$$8 1.1 $$a 69
863	4	0	$$8 2.1 $$a 243-245 $$w g