

SERIALS IN POLARIS

DEVELOPED BY THE SHARE BIBLIOGRAPHIC SERVICES TEAM REVISED APRIL 2016

Table of Contents

Initial setup: serials item record templates	
Create serial item record templates	
Serial Holdings Record (SHR)	
Edit publication pattern options	
Delete Serial Holdings Record	14
Checking in received issues	
If an issue is checked in by mistake	12
Check in multiple issues	
Change previous issue to circulating when new issue is received	
Combine issues	
If issue enumeration doesn't match what's in the pattern	13
To add more issues	
If an issue outside of the usual publication pattern is received	13
If frequency changes and a new publication pattern is created	14
To weed issues	14
If you stop receiving a magazine, but you still have some issues	14
To print labels	14

Initial setup: serials item record templates

- Polaris will create an item record automatically when an issue is checked in through the serials module, but you must create one or more serials item record templates first
- Note: If your library doesn't barcode magazines, but you're choosing to use the serials module for holdings records only, you don't need a template
- This is initial setup that will only need to be done once, unless you have to edit the template for some reason
- You may need more than one template, depending whether you put magazines in more than one collection, or use more than one material type
 - You'll need a separate template for each different collection code and/or material type you use, i.e., if you use different collection codes or material types for adult and juvenile magazines, etc.
 - If your library has more than one branch, you'll need separate templates for each branch

To create an item template:

- *New* icon on the Polaris toolbar
- Highlight *Item template* and click OK.
- Item template workform opens
- *Name:* <u>Must</u> start with Serial, but it's fine to add wording after
- *Template Owner:* Your library or branch
- *Price*: Can set a default price here, if desired—this will apply to <u>all</u> item records created through this template. You can also set a default price for an individual title in the Serial Holdings Record
- *Non-circulating:* Check this box if you do not circulate your current issue
- *Owner:* Your library or branch
- Assigned: Your branch
 - This Assigned Branch will also be used in the Serial Holdings Record
- *Collection:* Choose desired collection from the dropdown. Any collection may be used—it does not have to be Periodical
 - This Collection will also be used in the Serial Holdings Record
- Shelf location: Assign if desired
- o Circulation status: Can leave as In-Process, or mark as In
- Complete *Material type, Loan Period, Fine Code, Renewal limit* as desired
 - This Material Type will also be used in the Serials Holdings Record
- *Stat code:* complete if desired
- *Name of piece*: leave blank

- Call number
 - Choose whatever call number scheme your library uses, even if you don't put call numbers on your magazines
 - If you use a set prefix on all periodicals, can fill in here
- Loanable, Holdable as desired
- o Home branch: your branch. Leave Do not float box unchecked
- o Save
- Copy this template for any others that you need. Give each template a new name (the name must always start with Serial)
 - To copy, click the *New* icon (white paper) on the template toolbar
 - *New Item Template* dialog box opens. Click the *Copy Existing Work Form* radio button (if not already selected). Click *OK*.

New Item Template	×
C Clear Work Form	ОК
Copy Existing Work Form	Cancel
	Help

- New Item Template workform opens, with information from the existing template already filled in
 - Change the name of the template (the name has to start with Serial)
 - Change other fields as needed
 - Save
- Here's an example of a completed serials item template:

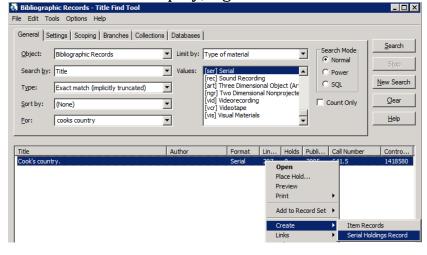
🛄 Item	Template 695	951 - Polaris					
File Edit	View Links	s Tools Help					
	≱8						
te	Template Name:	Serial-Edwardsville Template owner: Illinois Heartland Library S	ystem - Edwardsville (br)				
Template	Title: Author: Call number:	✓ Non-circulating Parent	trol number:				
Item Te	Owner:	Illinois Heartland Library System - Edwardsville (br) Shelf location: (None) Illinois Heartland Library System - Edwardsville (br) Temporary location:					
			· · · · · · · · · · · · · · · · · · ·				
đ	Circulation pa Material typ Loan period Fine code: Renewal lin Stat code: Name of piece Home brane	type: Periodical Image: Scheme: Dewey Decimal Image: Class: cod: Periodical Image: Class: Image: Class: Image: Class: imit: 2 Image: Class: Image: Class: Image: Class: (None) Volume: Image: Class: Image: Class: cce: Class: Image: Class: Image: Class:	· sibrary and branches s branch only vers				
The templa	te was saved su	successfully.	NUM				

Serial Holdings Record (SHR)

- You'll need to create a Serial Holdings Record for each magazine title and for each subscription of that title
 - If you have more than one subscription for a particular magazine
 - (i.e., for different branches), you must have an SHR for each
- This is a one-time setup—will only need to edit the SHR if something changes, i.e., frequency of publication

Steps:

- Search in the cataloging module to find the appropriate bibliographic record for the periodical
- Use any search you like to find the record—ISSN, title, etc.
- If you search by title, it may be helpful to limit by *Type of Material* of Serial (rather than Periodical)
- From the results display, right click *Create>Serial Holdings Record*



or

• Open the record, then click *Tools>Create Serial Holdings Record*

Bibliographic Record	d 1418580 - MARC21 - Polaris			
File Edit View Links	Tools Help			ot
		bl+J bl+M bl+I) • <i>•</i> [• 1 • • • • • • • • • •	E ?
Control numb	Place Hold Ct Sort	51+H	E (sys)	Record status: Final
Title:	Add to Record Set	•		Display in PAC 🕅 III.
Re	Create Item Records			
Tag Ind	Create Serial Holdings Record			

- SHR workform opens
 - Title and ISSN will be filled in
 - Destination—your branch—must match your item template
 - Order type: Subscription
 - *Material Type*: must match your item template
 - *Collection*: must match your item template

- *Status*: Currently received
- *Copy no.*—refers to the number of subscriptions you have for that title
- Shelving scheme—whatever your library uses—it may default in
- Completeness code: Complete
- *Call number*—fill in here if desired
- *Display in PAC*—generally leave checked
- *Retention designator*—choose from the dropdown—generally will use *Retained for a limited period*
- *Retention period*—previous or latest, as desired
 - Previous 1 year means you retain the current year plus the previous year
- Save

Save
Serial Holdings Record - 18174 - General - Polaris
Title: Cook's country. ISSN/ISBN: 1552-1990 Find Destination: Illinois Heartland Library System - E Order type: Subscription Material type: Periodical Image: Collection: Periodical Image: Collection: Periodical Image: Collection: Status: Currently Received Copy no.: 1 Bib no.: 1418580
Title: Cook's country. ISSN/ISBN: ISS2-1990 Find Destination: Illinois Heartland Library System - E Order type: Subscription Material type: Periodical Image: Periodical Collection: Periodical (periodical) Status: Currently Received Copy no.: 1 Bib no.: 1418580 Holdings Shelving scheme: Devery Decimal Completeness code: Complete Image: Completeness code: Completeness code: Completeness code: Completeness code: Image: Completeness code: Ima
Publication Patterns
Category / Linkage No. Frequency Designation Regularity Pattern Calendar Grange Pattern
The record was saved successfully.

- Small icons on the coolbar are now highlighted
- Click white paper (*Create a new pattern*)
- Fill in boxes on the top
 - *Pattern category*: Basic Bibliographic
 - Can fill in arrival pattern if desired--optional
 - Check the box to *Generate items at check-in* (if you barcode)
 - If *Generate items at check-in* box is checked, also check the box to *Prompt for barcode*
 - *Price*: fill in here if there is a default price for all issues of this title
 - *Number of issues to predict*—defaults to max of 50
 - Suggest using a smaller number—i.e., 12 for monthly, 20-25 for weekly
 - Can add public or non-public notes if desired

- Find your title in the list of patterns—you can type the first letter to go to patterns that start with that letter, or start typing title
 - Hover over the title to see any notes
 - If don't find a pattern for your title in the list, enter a help desk ticket to have one created

Category:	Basic Bibliographic Uni	t 💌 Start date	• 12/ 1/2012 💌	End date	:		-
Options							
Arrival pattern:	days	🚽 publication 🛛 🔽 Genera	ate items at check-in 🔽 Pi	rompt for ba	rcode Unit p	rice: \$	5.00
Type of supplement/index:				Number of i	ssues to pre	dict: 24	ł
Textual holdings:							4
Textual holdings public note:							4
Textual holdings non-public note:							4
							_
Templates							
emplates Template Name	Frequency	Designation	Regularity Pattern	Calend	Creator	Note	
		Designation (2013)	Regularity Pattern	Calend	Creator	Note Crea	 •
Template Name	buyi Annual	-	Regularity Pattern pm 01,02,03,04,05,0	Calend			
Template Name Consumer reports	buyi Annual on h Monthly	(2013)		Calend	swaldrop	Crea	
Template Name Consumer reports Consumer reports	buyi Annual on h Monthly 552 Bimonthly	(2013) vol. 25 no. 1 (Janua	pm 01,02,03,04,05,0	Calend	swaldrop swaldrop	Crea Crea	
Template Name Consumer reports Consumer reports Cook's country (1 Cook's illustrated Cooking light (088	buyi Annual con h Monthly 552 Bimonthly (106 Bimonthly 6-44 Monthly	(2013) vol. 25 no. 1 (Janua no. 48 (December 2	pm 01,02,03,04,05,0 cm 02/03,04/05,06/0	Calend	swaldrop swaldrop swaldrop	Crea Crea Crea	
Template Name Consumer reports Consumer reports Cook's country (1 Cook's illustrated	buyi Annual con h Monthly 552 Bimonthly (106 Bimonthly 6-44 Monthly	(2013) vol. 25 no. 1 (Janua no. 48 (December 2 no. 120 (January/F	pm 01,02,03,04,05,0 cm 02/03,04/05,06/0 cm 01/02,03/04,05/0		swaldrop swaldrop swaldrop swaldrop	Crea Crea Crea Crea	
Template Name Consumer reports Consumer reports Cook's country (1 Cook's illustrated Cooking light (088	buyi Annual on h Monthly 552 Bimonthly (106 Bimonthly 6-44 Monthly a De Bimonthly	(2013) vol. 25 no. 1 (Janua no. 48 (December 2 no. 120 (January/F vol. 27 no. 1 (Janua	pm 01,02,03,04,05,0 cm 02/03,04/05,06/0 cm 01/02,03/04,05/0 cm 01/02 pm 03,04,		swaldrop swaldrop swaldrop swaldrop swaldrop	Crea Crea Crea Crea Crea	

- Highlight pattern click Next
- Shows pattern that was created by SHARE staff- do not change this click *Next*
- *Regularity pattern* shows publication frequency do not change this -click *Next*
- Prediction results—shows number of issues predicted

Designation	Publication	Expected A	•	Start date:	12/ 1/2012	~		
o. 48 (December 2012/January 2013)	12/1/2012	12/1/2012						
io. 49 (February/March 2013)	2/1/2013	2/1/2013		End date:		Ŧ		
io. 50 (April/May 2013)	4/1/2013	4/1/2013						
io. 51 (June/July 2013)	6/1/2013	6/1/2013		Designation:	no. 48 (December 2	512)		
io. 52 (August/September 2013)	8/1/2013	8/1/2013						
io. 53 (October/November 2013)	10/1/2013	10/1/2013						
o. 54 (December 2013/January 2014)	12/1/2013	12/1/2013						
io. 55 (February/March 2014)	2/1/2014	2/1/2014						
io. 56 (April/May 2014)	4/1/2014	4/1/2014						
io. 57 (June/July 2014)	6/1/2014	6/1/2014						
io. 58 (August/September 2014)	8/1/2014	8/1/2014						
io. 59 (October/November 2014)	10/1/2014	10/1/2014						
io. 60 (December 2014/January 2015)	12/1/2014	12/1/2014						
io. 61 (February/March 2015)	2/1/2015	2/1/2015						
ю. 62 (April/May 2015)	4/1/2015	4/1/2015						
io. 63 (June/July 2015)	6/1/2015	6/1/2015						
io. 64 (August/September 2015)	8/1/2015	8/1/2015						
io. 65 (October/November 2015)	10/1/2015	10/1/2015						
io. 66 (December 2015/January 2016)	12/1/2015	12/1/2015	-	View More				
Number of issues/parts to save: 24 Save as template Template name:								

- Click *Finish*—a box comes up to confirm the number of issues to predict—Click *Yes*
- Save

- Recommend adding an additional pattern in case you get an extra issue that is not part of the regular frequency
 - Not required, but won't be able to check in extra issue without it
 - Can be added later if needed—the pattern will have to be added to the SHR before you can check in the issue

Steps:

- Click *New* icon on coolbar
- *Pattern Category*: Supplementary material
- Check boxes to create item record and prompt for barcode if desired
- Leave Number of issues to predict at 50
- Find pattern in list—Special issue IHLS
- Next
- Next
- No issues predicted—irregular pattern
- Finish
- Warning—no issues predicted
- *OK*
- Finish
- Save

Category:	Supple	mentary Mater	ial 💌 Start dat	e: 1/ 1/2013 💌	End date	:	
ptions							
Arrival pattern:		days	 publication Gener 	ate items at check-in 🔽 Pi	ompt for ba	rcode Unit p	rice: \$5.0
Type of supplement/index:					Number of i	ssues to pre	dict: 50
Textual holdings:							
Textual holdings public note:							
Textual holdings non-public note: emplates							
Templates		Frequency	Designation	Regularity Pattern	Calend	Creator	Note
Southern living (00)38	Monthly	vol. 48 no. 1 (Janua	pm 01,02,03,04,05,0		swaldrop	Crea
Special Issue - IHL	S	Completely				swaldrop	Crea
Spider (1070-2911) - I	Monthly	vol. 20 no. 1 (Janua	cm 11/12,07/08,05/0		swaldrop	Crea
Spirituality & healt	h (1	Bimonthly	Vol. 17 number 1 (J	cm 01/02,03/04,05/0		sstone	Crea
Sport aviation (00	38-7	Monthly	vol. 62 no. 1 (Janua	pm 01,02,03,04,05,0		sstone	Crea
Sports illustrated (003	Weekly	vol. 118 no. 1 (Janu	cw 0701mo/0702mo,1	0108,0	swaldrop	Crea
	or ki	Monthly	vol. 25 no. 1 (Janua	cm 01/02 pm 03,04,		swaldrop	Crea

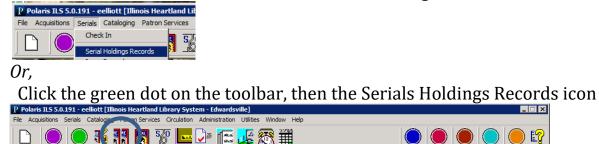
- If your title gets a <u>regular</u> supplement or index, also add a publication pattern for that
 - Find the pattern in the list for the supplement—will be a separate pattern in addition to the regular pattern for the title
 - If there's no pattern in the list for a regularly published supplement, enter a help desk ticket
- Other views of the Serial Holdings Record (icons on the sidebar)
 - Staff notes view
 - Public notes view—will be seen in the PAC
 - Example: Current issue does not circulate

- Orders view--Acquisitions
- Example of Serial Holdings Record with publication patterns for the periodical and for supplementary material

Serial Holdings Record - 18174 - General - I	Polaris	
File Edit View Links Tools Help		
Differ Cook's country. Destination: Illnois Heartland Library Collection: Periodical (periodical)	y System - E ▼ Order type: Subscription ▼ Status: Currently Received ▼	ISSN/ISBN: 1552-1990 Find Y Material type: Periodical • • Copy no.: 1 Bib no.: 1418580
Title: Cook's country. Destination: Ilinois Heartland Library Collection: Periodical (periodical) Holdings Dewey Decimal Call number: Dewey Decimal Call number: Retention designator: Retained for a Publication Patterns Publication Patterns	a lmited period	Completeness code: Complete Co
Category / Linkage No. Frequ Basic Bib / 1 Bimor	uency Designation Regularity nthiy no. 48 (December 2012 cm 02/03, pletely irreg	/ Pattern Calendar Change Pattern 04/05,06/07 Open Open Open
For Help, press F1		NUM

To edit publication pattern options

- Follow the instructions below to edit the following options in a Serial Holdings Record: Start and end date, arrival pattern, creation of an item record, unit price, number of issues to predict, and notes
- On the Polaris menu bar, click Serials>Serial Holdings Records



• This opens the Serial Holdings Records find tool

🔕 Serial Holdings Records - Title Find	l Tool		
File Edit Tools Options Help			
General Settings			
Object: Serial Holdings Records Search by: Title	Limit by: (None) Value:	Search Mode Normal Power SQL	Search Stop New Search
Type: Exact match (implicitly trun Sort by: (None)	cated)	Count Only	Clear
For:		Stay on Select	

• Search by Title, ISSN, etc.

Serial Ho	oldings Records - Title Find Tool							_ 🗆 🗵		
File Edit Tools Options Help										
General	Settings									
Object:	Serial Holdings Records	Limit by: (None)	•	Search Mode				Search Stop		
Search by Type:	y: Title Exact match (implicitly truncated)	Value:		C Power C SQL				New Search		
Sort by:	(None)	<u>·</u>		Count Only				Clear		
For:	country	•						Help		
Title		ISSN/ISBN	Copy No.	Status	Destination	Collection	Material T	Order Type		
Country.		0895-0377	1	Currently Received	carp	Periodical	Periodical	Subscription		
	le and small stock journal.	8750-7595	1	Currently Received	carp	Periodical	Periodical	Subscription		
The Saturd	day evening post.	0048-9239	1	Currently Received	carp	Periodical	Periodical	Subscription		

• Highlight the title in the results, and double-click or click Enter to open the Serial Holdings Record. Highlight the desired publication pattern. Right-click, and choose *Edit pattern options* from the dropdown menu

Seria	l Holdings Recon	d - 15780 - Gen	eral - Polaris							_	
File Edit	t View Links To	ools Help									
	≥ ,	• X	r [?								
brd	Title:	Country.					ISSN/ISBN:	0895-0377	7	Find	
2	Destination:	Carlinville Public L	ibrary (CARP-ZED 💌	Order type:	Subscription	7	Material type:	Periodical			1
Re	Collection:	Periodical (period	ical) 💌	Status:	Currently Re	ceived 💌	Copy no.:	1	Bib no.:	759786	
Serial Holdings Record	Holdings Shelving schem	ne: Dewey	Decimal	•			Comple	eteness code:	Complete	•]
ldir	Call number:						Dis Dis	play in PAC			
0	Retention desig	gnator: Retain	ed for a limited period					•	-		
4		C Prev	rious	▼ re	tained 🤅	Latest 1	▼ Year(s)	💌 retai	ned		
ja.	Publication Patte	erns									_
Ser									D 7 🖻	¢⊜×	
G	Category / Link	kage No.	Frequency	Designation		Regularity Pa		Calendar Cha		attern	
	Basic Bib / 1		Bimonthly	vol. 27 no. 1	(February	cm 06/07,08	/09,10/11.	Edit pattern op	ptions)pen	
- 1								Open			
								Print			
							1	Delete			
								Add issue/part	t		
	1							Close pattern			
For Help,	press F1							Predict issues/	parts		N

• Make the desired changes, and click *OK*. Save the record.

attern Category:	Basic Bibliographic	Unit 💌	Start date: 🚺 1	/2013 -	End date:	
ptions						
Arrival pattern:	days	 publication 	Generate items	at check-in 🔽	Prompt for barcode Unit pri	te: \$3.
Type of supplement/index:					Number of issues to predi	ct: 12
Textual holdings:						
Textual holdings public note:	,					
Textual holdings non-public note:	,					
	1					

Check in received issues

Click Serials>Check In on menu bar



or Click the green dot on the toolbar, then the Check In icon

- Search for the magazine by title, ISSN, etc.
- Find your SHR in the list; highlight and double-click to open
- Will see a list of issues, depending on how many were predicted in the SHR
- Defaults to a status of Not Received in *Issue/part status* box. Shows Expected in view
- Find the issue that corresponds to the issue you have in hand
- Highlight your issue
 - Right-click>Check-in

Designation	Category / Linka	. Expected	Status	Status Date	Pattern	Route Statu
no. 60 (December 2014/January 2015) Basic Bib / 1	12/1/2014	Expected	12/0/2014	0	
no. 61 (February/March 2015)	Basic Bib / 1	2/1/2015	Expected	Open		
no. 62 (April/May 2015)	Basic Bib / 1	4/1/2015	Expected	Print		•
no. 63 (June/July 2015)	Basic Bib / 1	6/1/2015	Expected	Delete		
no. 64 (August/September 2015)	Basic Bib / 1	8/1/2015	Expected			
no. 65 (October/November 2015)	Basic Bib / 1	10/1/2015	Expected	Add To Route	e List	
no. 66 (December 2015/January 2016) Basic Bib / 1	12/1/2015	Expected	Check-in		

- Check-in icon on toolbar
- Will get box to fill in barcode
- Box to fill in price is grayed out—price will default in from SHR or item template if you put one in there
 - If a price isn't defaulted, it can be added to the item record manually
- If you've checked the box to create an item record, and you get a message that Polaris can't locate an item template, it means the *Collection* and/or *Material Type* in the SHR doesn't match the *Collection* and/or *Material Type* in the item template. You'll need to edit the SHR to match the template, or edit the template to match the SHR
- *Status* changes to Received
- An item record is automatically created if appropriate
 - If you need to make changes to the item record:
 - Highlight the issue in the list
 - Right click>Links>Item record. Double-click to open

	Designation	Category / Linka	Expected	Status	Status Date	Pattern	Route Status
Subs	no. 60 (December 2014/January 2015)	Basic Bib / 1	12/1/2014	Received		Open	
	no. 59 (October/November 2014)	Basic Bib / 1	10/1/2014	Received	Open		
G	no. 58 (August/September 2014)	Basic Bib / 1	8/1/2014	Received	Print	•	
	no. 57 (June/July 2014)	Basic Bib / 1	6/1/2014	Received	Delete		
	no. 56 (April/May 2014)	Basic Bib / 1	4/1/2014	Received			
	no. 55 (February/March 2014)	Basic Bib / 1	2/1/2014	Received	Add To Route Lis	st	
	no. 54 (December 2013/January 2014)	Basic Bib / 1	12/1/2013	Received	Check-in		
					Claim		
					Combine Issues		
					Remove From Ro	oute List	
	,				UnCheck-In		
heck in com	volatad	7 records		1	Links		

- Checked-in issue disappears from list of Expected issues
- To see, change *Issue/part status* to All
 - Shows all issue with any status
- If an issue is checked in by mistake
 - Highlight issue
 - Right-click>UnCheck-In

S	Designation	Category / Linka	Expected	Status	Status Date	Pattern R	oute Status
ര് 🛛	no. 60 (December 2014/January 2015)	Basic Bib / 1	12/1/2014	Received	1 Open	-	
v ,	no. 59 (October/November 2014)	Basic Bib / 1	10/1/2014	Received	1 Print		
G	no. 58 (August/September 2014)	Basic Bib / 1	8/1/2014	Received	1		
	no. 57 (June/July 2014)	Basic Bib / 1	6/1/2014	Received	1 Delete		
	no. 56 (April/May 2014)	Basic Bib / 1	4/1/2014	Received	1 Add To Ro		
	no. 55 (February/March 2014)	Basic Bib / 1	2/1/2014	Received	1	Jte List	
	no. 54 (December 2013/January 2014)	Basic Bib / 1	12/1/2013	Received	1 Check-in		
					Claim		
					Combine Is		
						om Route List	
	2				UnCheck-I	1	

or

- *UnCheck In* icon on toolbar
- Changes status back to Expected and deletes item record
- Check in multiple issues
 - Highlight all and check in by right-click or icon
 - Will get prompt for price and barcode as needed for each

• Change previous issue to circulating when new issue is received

- Find and highlight issue to change
- Right-click>*Links*>*Item record*
- Edit as needed>*Save*

• Combine issues

- Highlight both issues
- Right-click>Combine issues
- Can combine chronology or enumeration only, or both

C	ombine Issues					
	Combine:	<both></both>	Designation:	no. 61/62 (F	ebruary/April 20	15)
	Title of:	Chronology Enumeration				
	Public:					*
	Non-public:					*
	Non-public/warning:					4
	Expected arrival date:	2/ 1/2015 💌				
		OK	Ca	ancel		
٣	November 20151	RASE BID / 1	00/172015	Evnerten	17/8/2014	Unen

• Will continue numbering with next issue

• If issue enumeration doesn't match what's in the pattern

- Highlight issue—right-click>Open
- Change info—i.e., volume number or date

📙 Issue Record - 1202826 - General - Polaris	
File Edit View Links Tools Help	
<u> </u>	
Title: Cock's country. ISSN: ISSN:	7
Designation: no. 61 (February/March 2015) Title of:	
Brune aton Levels Chronology Levels no. \$1 Prices \$7 Prices \$7 Prices \$7 Prices \$7 Prices \$7 Prices \$7	
() Issue unit price: \$0.00	
For Help, press F1	NUM

- Save
- To change the prediction of future issues based on the changed info:
 - Highlight all other issues in list—right-click>Delete
 - Click icon Predict Issues or Parts
 - Choose pub pattern>*Select*

ublication Pattern	s			×
Category / Linkag	Frequency	Start Designation	Regularity Pattern	Calendar Change
Basic Bib / 1	Bimonthly	no. 48 (Decembe	cm 02/03,04/05,	
Supplement / 1	Completely irregular			
	Sele	ect Cano	el	

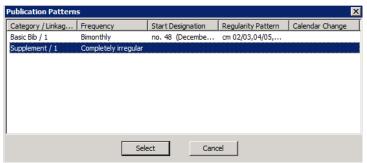
• Will add more issues based on changed info

• To add more issues

- Highlight the last issue
- Click icon to Predict Issues or Part
- Choose appropriate publication pattern>Select
- You'll see the new list of predicted issues>*OK*
- Save

• If an issue outside of the normal publication pattern is received

- Click icon to *Add Issue or Part*
- Choose *Supplement* pattern. Click *Select*



- Fill in boxes as desired—must put something in Enumeration level box
- Save
- Issue will now be in the list
- Highlight and check in
- If the special issue pattern is not in your SHR, it will have to be added before you can check the issue in

• If the frequency changes, and new publication pattern is created

- SHARE staff will send out a general notice
- In the SHR, highlight the publication pattern, right-click>*Close pattern*
- Click the icon to add a new pattern
- Find the new pattern in the list
- **To weed issues**, i.e at the end of the year
 - Find the issues in *Check-In*
 - Highlight issues to be deleted>Right-click>*Delete*
 - This also automatically deletes the item record
 - Deleting an item record through cataloging also deletes the issue from the SHR

$\circ~$ If you stop receiving a magazine, but you still have some issues

- In the SHR, change *Status* to *Not Currently Received*
 - Close the publication pattern as above

Delete Serial Holdings Record

- Must first delete any issues with a status of Received
- It's okay to have issues with a status of Expected
- Click Delete icon
- There is no *Undelete* option for SHRs—the record is out of the database

• To print labels (optional)

- Utilities>Label Manager
- *Label* on menu bar>Serial sheets
- Tools on menu bar>Label settings and content
- Content tab
- Content Types>Serial
- Choose what you want for each section; *Save*
- In Check-In view of SHR, click icon for label
- Go back and print from Label Manager