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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: Must 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 all 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
- 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
- **Home branch**: your branch. Leave **Do not float** box unchecked
- **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 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:
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)

  o From the results display, right click Create>Serial Holdings Record

  ![Create SHR](image1.png)

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

  ![Open SHR](image2.png)

  o 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**

- 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

- 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

- 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*

- If your title gets a regular 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

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

Or,
Click the green dot on the toolbar, then the Serials Holdings Records icon

- This opens the Serial Holdings Records find tool
- Search by Title, ISSN, etc.

- 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.

- Make the desired changes, and click OK. Save the record.
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

- 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
- 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**

    ![UnCheck In icon on toolbar](image)

    - **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

    ![Combine issues](image)

    - 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

- 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

  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
  - **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