



SERIALS IN POLARIS

DEVELOPED BY THE
SHARE BIBLIOGRAPHIC SERVICES TEAM
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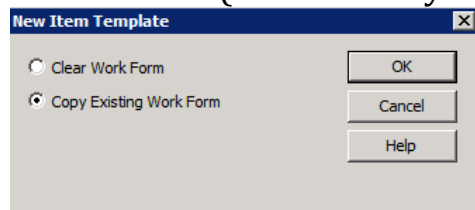
Initial setup: serials item record templates

- 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*.



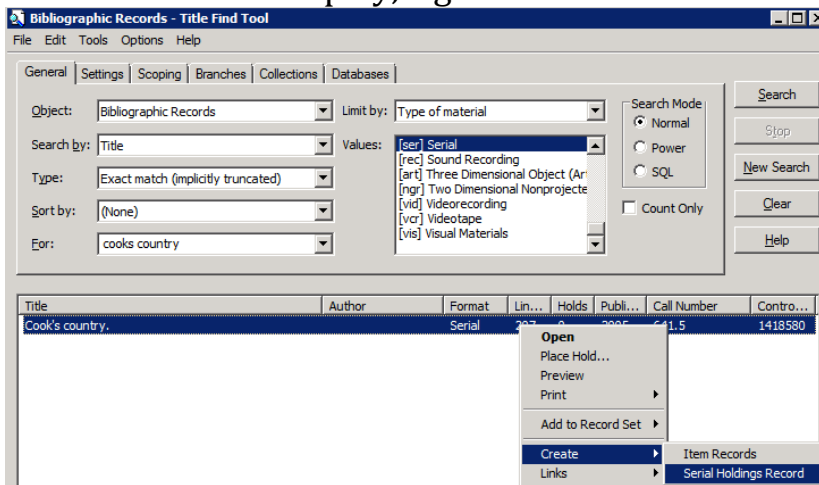
- New Item Template workform opens, with information from the existing template already filled in
 - Change the name of the template (the name has to start with Serial)
 - Change other fields as needed
 - Save
- Here's an example of a completed serials item template:

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

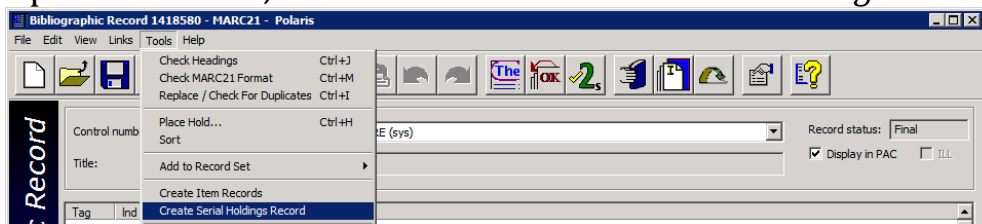
Steps:

- 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)
- From the results display, right click *Create>Serial Holdings Record*



or

- Open the record, then click *Tools>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

- Small icons on the toolbar 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

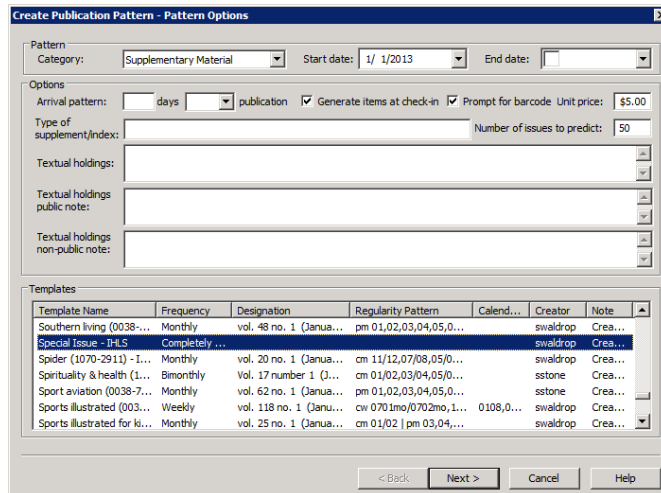
- Highlight pattern – click *Next*
- Shows pattern that was created by SHARE staff– do not change this – click *Next*
- *Regularity pattern* – shows publication frequency – do not change this -- click *Next*
- *Prediction results*—shows number of issues predicted

- 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

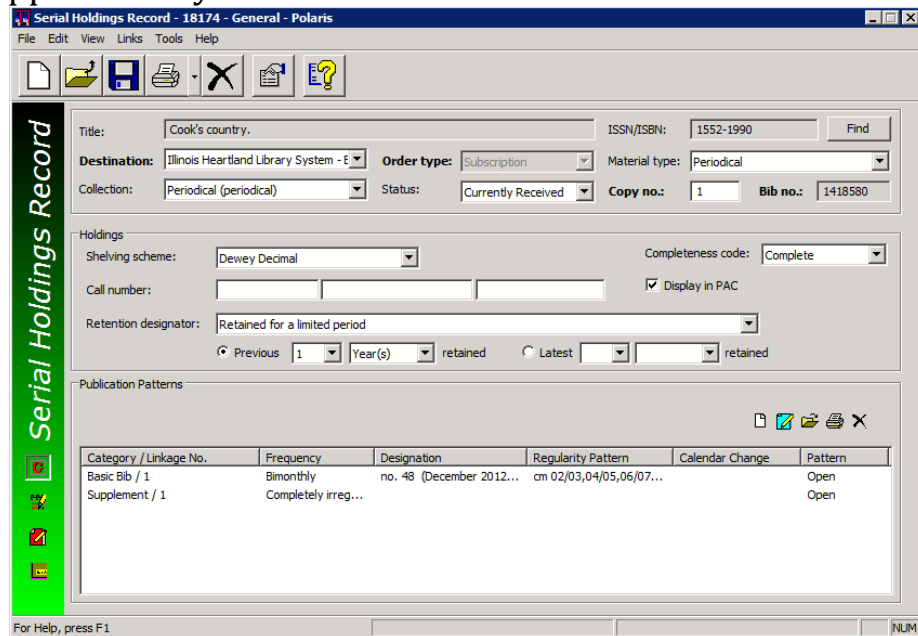
Steps:

- Click *New* icon on toolbar
- *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

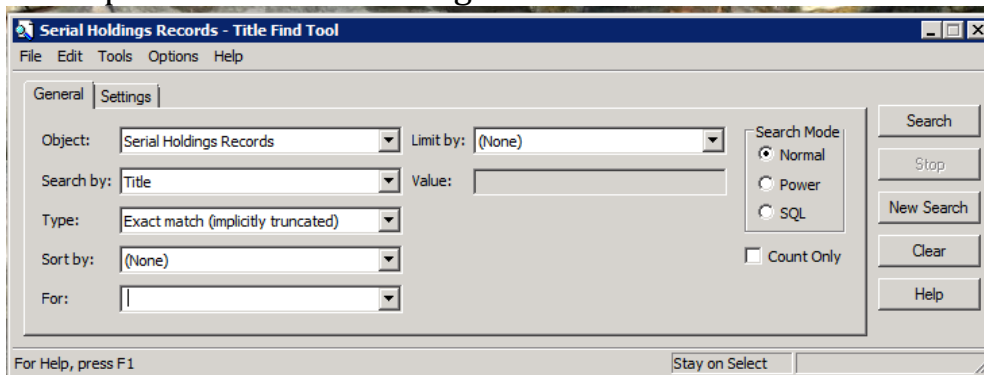


Or,

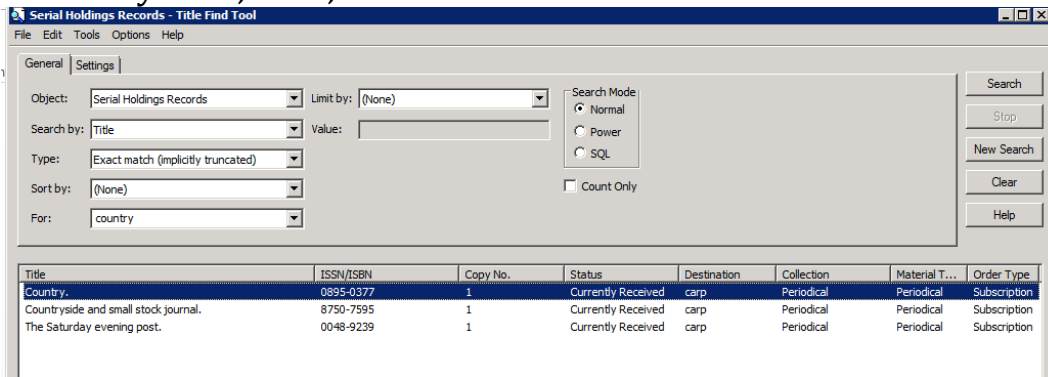
Click the green dot on the toolbar, then the Serials Holdings Records icon



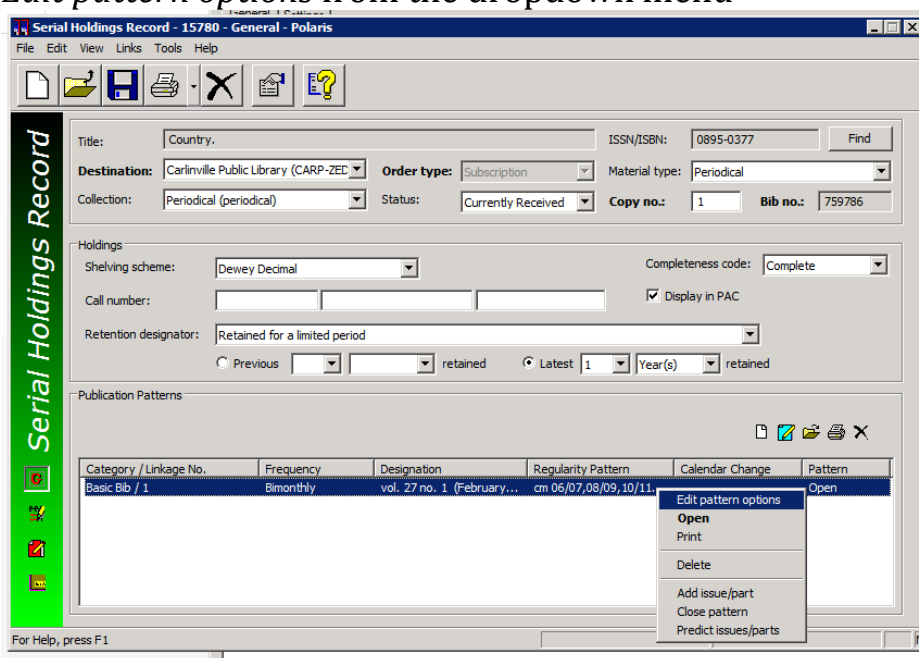
- This opens the Serial Holdings Records find tool



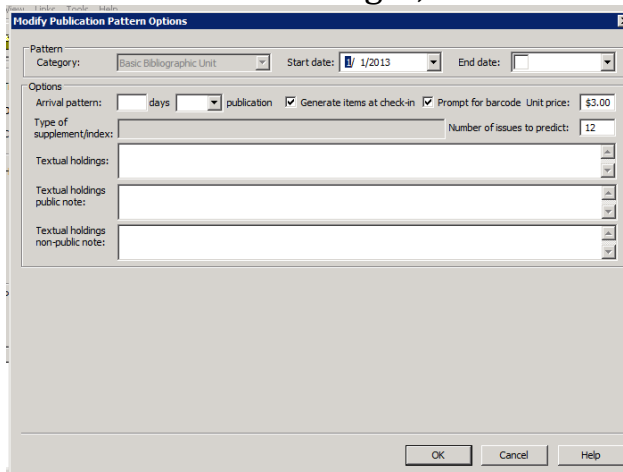
- Search by Title, ISSN, etc.



- 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

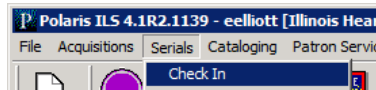


- Make the desired changes, and click *OK*. Save the record.



Check in received issues

- Click *Serials>Check In* on menu bar

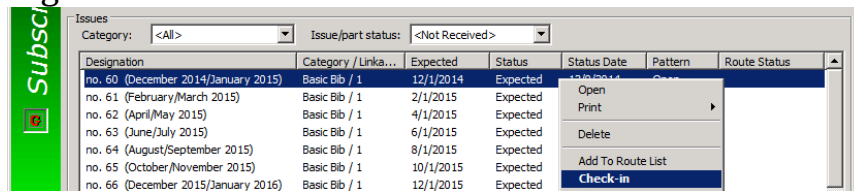


or Click the green dot on the toolbar, then the *Check In* icon



- 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

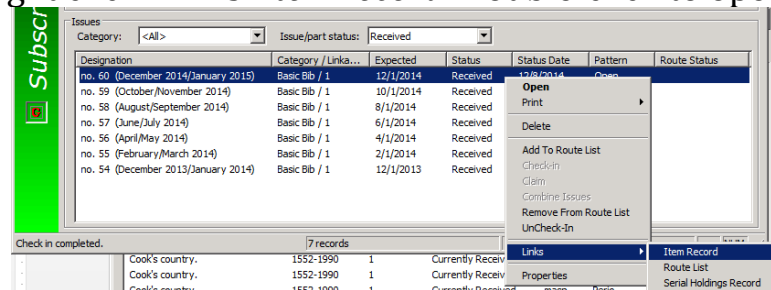
- Right-click>Check-in



or




- 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*

Designation	Category / Linka...	Expected	Status	Status Date	Pattern	Route Status
no. 60 (December 2014/January 2015)	Basic Bib / 1	12/1/2014	Received	1		
no. 59 (October/November 2014)	Basic Bib / 1	10/1/2014	Received	1		
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		
no. 56 (April/May 2014)	Basic Bib / 1	4/1/2014	Received	1		
no. 55 (February/March 2014)	Basic Bib / 1	2/1/2014	Received	1		
no. 54 (December 2013/January 2014)	Basic Bib / 1	12/1/2013	Received	1		

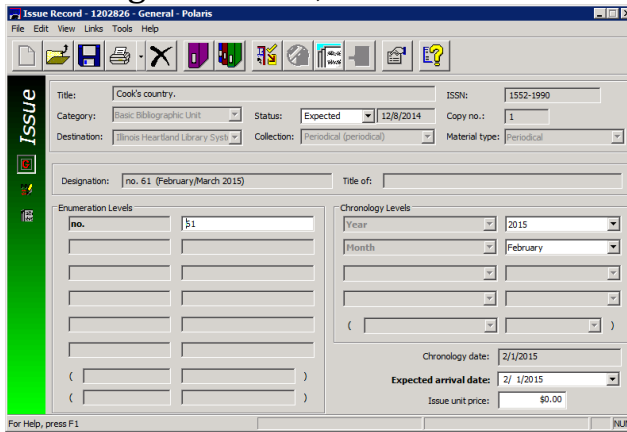
or


- *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

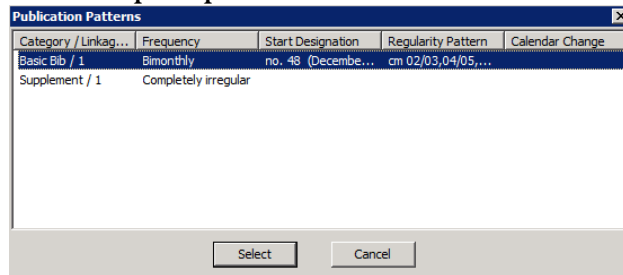
- Will continue numbering with next issue

- **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*




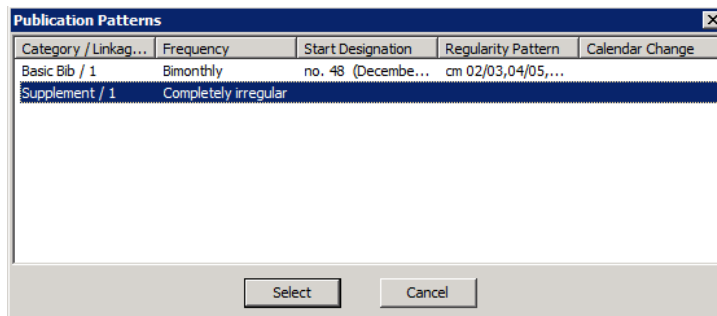
- Will add more issues based on changed info

- **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