

# **SERIALS IN POLARIS**

DEVELOPED BY THE SHARE BIBLIOGRAPHIC SERVICES TEAM REVISED APRIL 2016

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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:* <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> [ <b>• 1 • • • • • • • • • •</b>	<b>E</b> ?
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	<b> </b> •
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	<ul> <li>publication</li> <li>Gener</li> </ul>	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

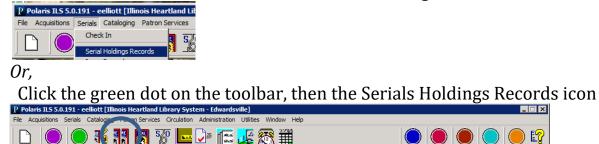
- If your title gets a <u>regular</u> supplement or index, also add a publication pattern for that
  - Find the pattern in the list for the supplement—will be a separate pattern in addition to the regular pattern for the title
  - If there's no pattern in the list for a regularly published supplement, 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									
	<b>≥ </b> ,	• <b>X</b>	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	
<b>- 1</b>								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	<ul> <li>publication</li> </ul>	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	-	
<b>v</b> ,	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	

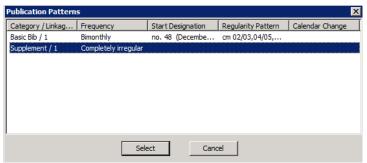
• Will add more issues based on changed info

# • 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