SERIALS IN POLARIS

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Initial setup: serials item record templates
- o 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
- o 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
- o This is initial setup that will only need to be done once, unless you have to edit the template for some reason
- o 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:

- o *New* icon on the Polaris toolbar
- o Highlight *Item template* and click OK.
- o Item template workform opens
- o *Name:* <u>Must</u> start with Serial, but it's fine to add wording after
- o *Template Owner:* Your library or branch
- o *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
- o *Non-circulating:* Check this box if you do not circulate your current issue
- o *Owner:* Your library or branch
- o *Assigned:* Your branch
  - ▪ This Assigned Branch will also be used in the Serial Holdings Record
- o *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
- o *Shelf location:* Assign if desired
- o *Circulation status*: Can leave as In-Process, or mark as In
- o Complete *Material type, Loan Period, Fine Code, Renewal limit* as desired
  - ▪ This Material Type will also be used in the Serials Holdings Record
- o *Stat code:* complete if desired
- o *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*.
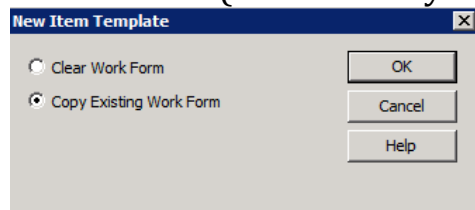

  - New Item Template workform opens, with information from the existing template already filled in
    - Change the name of the template (the name has to start with Serial)
    - Change other fields as needed
    - Save
- Here's an example of a completed serials item template:

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*
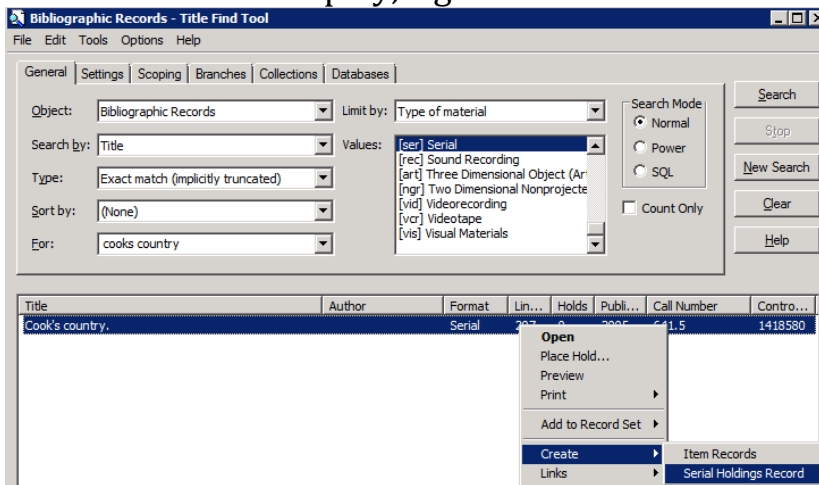
or

- Open the record, then click *Tools>Create Serial Holdings Record*
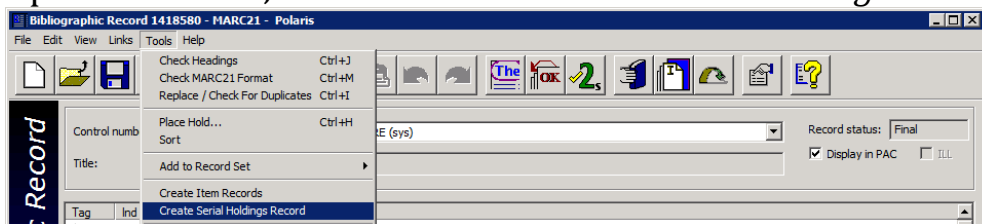
- SHR workform opens
  - Title and ISSN will be filled in
  - *Destination*—your branch—must match your item template
  - *Order type*: Subscription
  - *Material Type*: must match your item template
  - *Collection*: must match your item template

- *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 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

- o 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
  - o 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 N*umber 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*
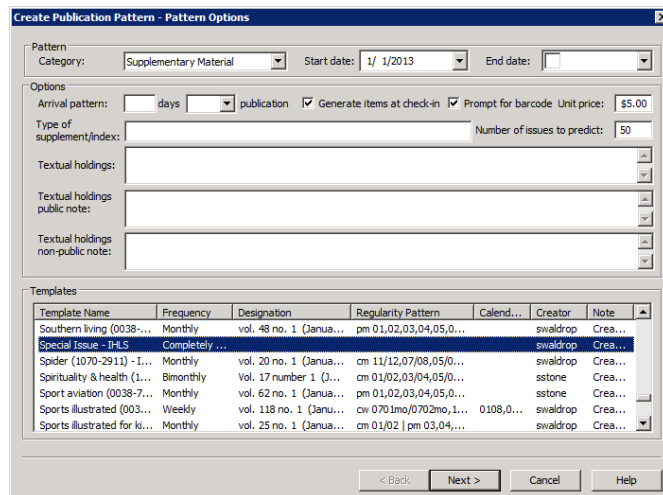
- If your title gets a <u>regular</u> supplement or index, also add a publication pattern for that
  - Find the pattern in the list for the supplement—will be a separate pattern in addition to the regular pattern for the title
  - If there's no pattern in the list for a regularly published supplement, 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
- o Example of Serial Holdings Record with publication patterns for the periodical and for supplementary material
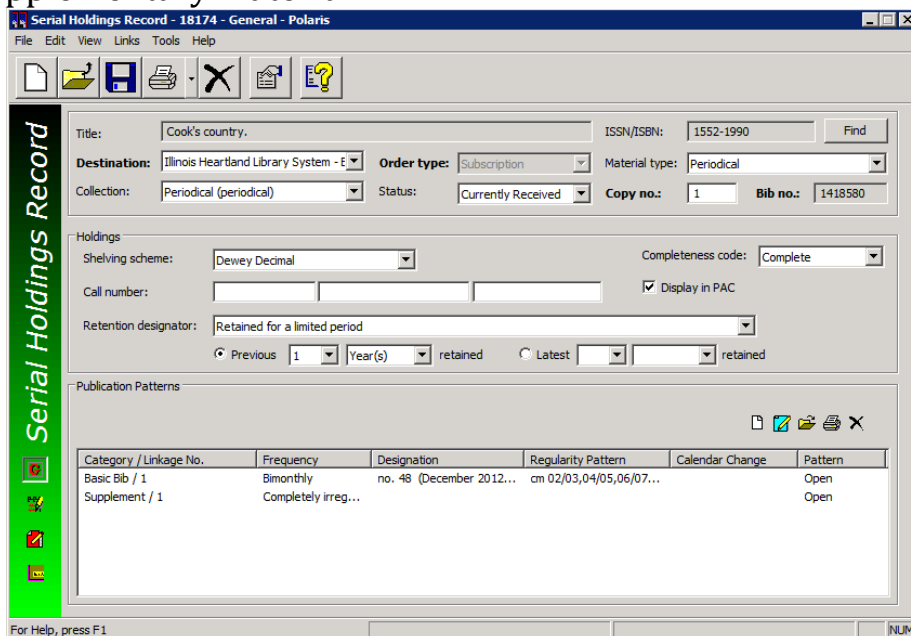
To edit publication pattern options
- o Follow the instructions below to edit the following options in a Serial Holdings Record: Start and end date, arrival pattern, creation of an item record, unit price, number of issues to predict, and notes
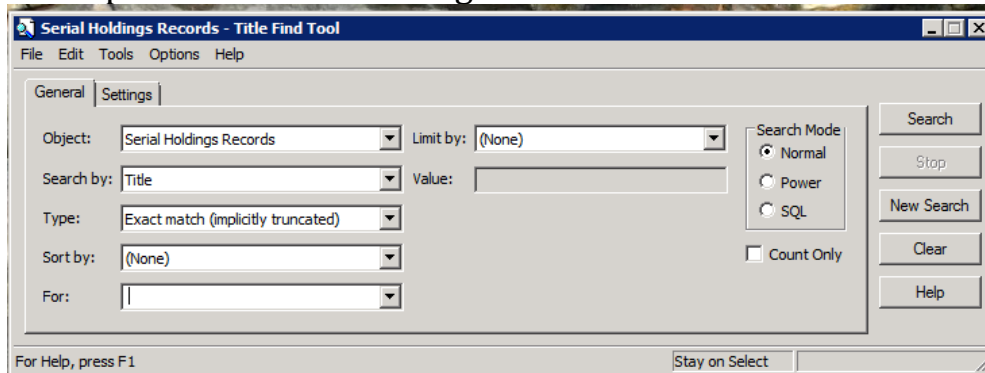- o On the Polaris menu bar, click Serials>Serial Holdings Records
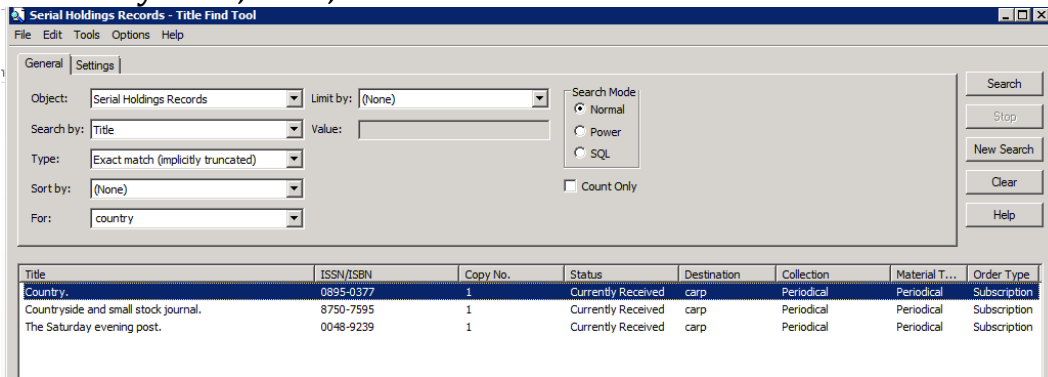

Or,
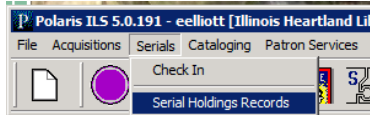
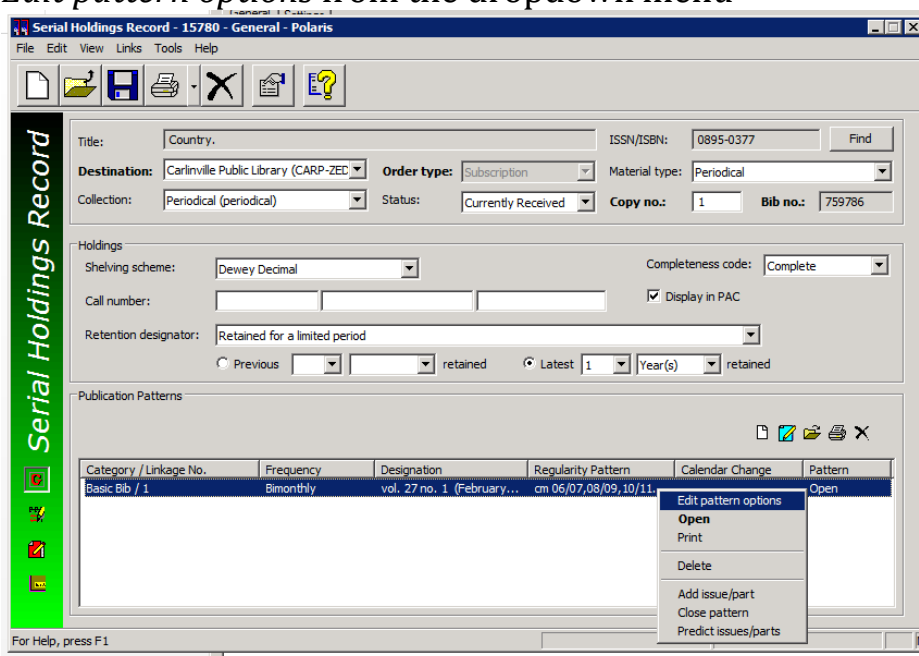Click the green dot on the toolbar, then the Serials Holdings Records icon

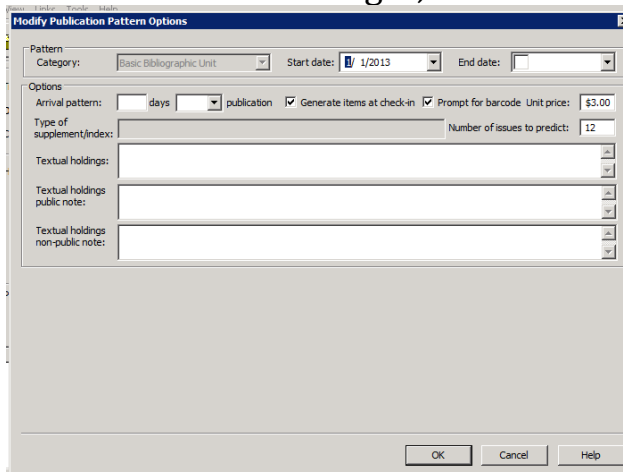- o This opens the Serial Holdings Records find tool

- 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
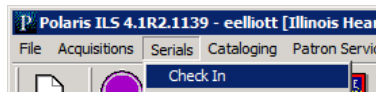

- Make the desired changes, and click *OK*. Save the record.

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
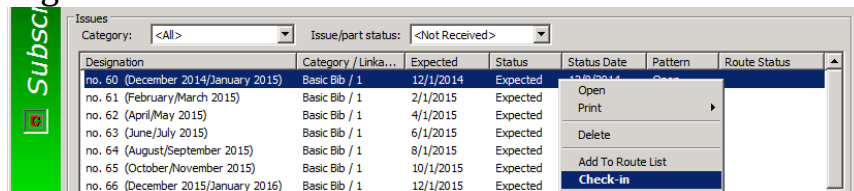

        or

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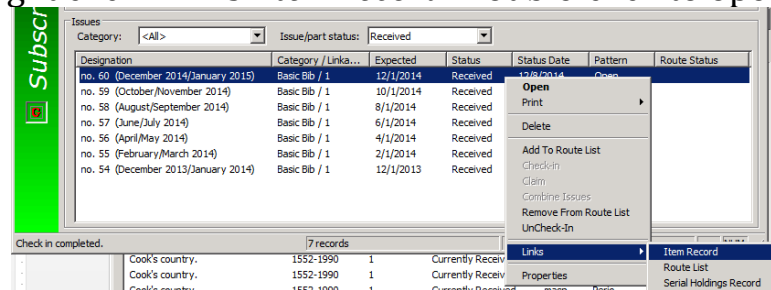
- Checked-in issue disappears from list of Expected issues
- To see, change *Issue/part status* to All
  - Shows all issue with any status
  - **If an issue is checked in by mistake**
    - Highlight issue
   - Right-click>*UnCheck-In*

  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

- o **If issue enumeration doesn't match what's in the pattern**
  - ▪ Highlight issue—right-click>*Open*
  - ▪ Change info—i.e., volume number or date
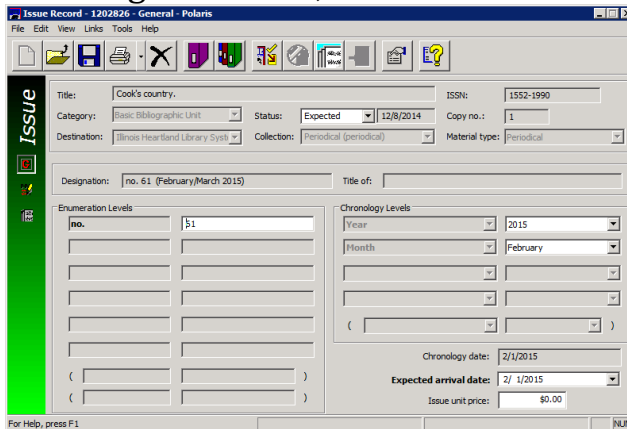
  - ▪ *Save*
  - ▪ To change the prediction of future issues based on the changed info:
    - Highlight all other issues in list—right-click>Delete
    - Click icon *Predict Issues or Parts*
    - Choose pub pattern>*Select*
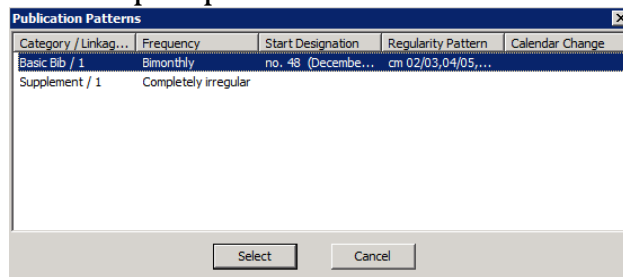
    - Will add more issues based on changed info
- o **To add more issues**
  - ▪ Highlight the last issue
  - ▪ Click icon to *Predict Issues or Part*
  - ▪ Choose appropriate publication pattern>*Select*
  - ▪ You'll see the new list of predicted issues>*OK*
  - ▪ Save
- o **If an issue outside of the normal publication pattern is received**
  - ▪ Click icon to *Add Issue or Part*
  - ▪ Choose *Supplement* pattern. Click *Select*

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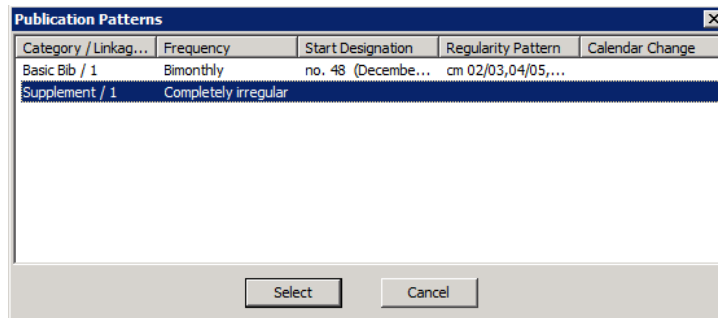
- Fill in boxes as desired—must put something in Enumeration level box
- Save
- Issue will now be in the list
- Highlight and check in
- If the special issue pattern is not in your SHR, it will have to be added before you can check the issue in
  - **If the frequency changes, and new publication pattern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