SERIALS IN POLARIS

DEVELOPED BY THE
SHARE BIBLIOGRAPHIC SERVICES TEAM
REVISED DECEMBER 2019
Table of Contents

**Initial setup: serials item record templates** .................................................................................................................. 3
  - Create serial item record templates .......................................................................................................................... 3

**Serial Holdings Record (SHR)** ...................................................................................................................................... 5
  - Edit publication pattern options ............................................................................................................................... 9
  - Delete Serial Holdings Record ..................................................................................................................................... 14

**Checking in received issues** ......................................................................................................................................... 11
  - If an issue is checked in by mistake ......................................................................................................................... 12
  - Check in multiple issues .............................................................................................................................................. 12
  - Change previous issue to circulating when new issue is received ............................................................................... 12
  - Combine issues ............................................................................................................................................................. 12
  - If issue enumeration doesn’t match what’s in the pattern ......................................................................................... 13
  - To add more issues ....................................................................................................................................................... 13
  - 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: 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**

![Serial Holdings Record](image)

- 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

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

  o **If an issue is checked in by mistake**
    - Highlight issue
    - Right-click > *UnCheck-In*

      ![Uncheck In Icon]

      or

      - *UnCheck In* icon on toolbar
      - Changes status back to Expected and deletes item record

  o **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

  o **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*

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

      ![Combine Issues]

      - 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