



Preparing for Serial and Multi-Part Hold Requests FAQ



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Preparing for Serial and Multi-Part Requests

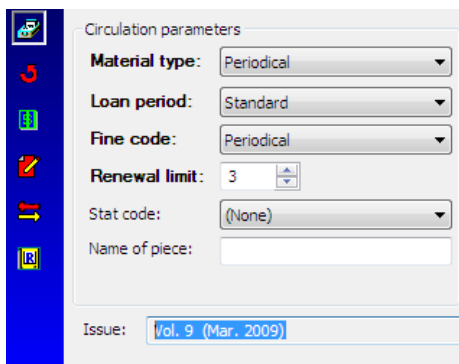
Beginning in Polaris 3.6, Polaris can distinguish among requests on plain monographs, serial, and multi-part sets from the PAC and the Polaris staff client. This makes it possible to place a request not just for any item linked to a bib (a bib-level request) or for one specific item (an item-level request), but for the first available copy of identical items; for example, the first available copy of the November 2008 issue of *Time* or Season 1 of *The Sopranos*.

The ability to place a serial or multi-part request is optional. By default, the options (one for serials, one for multi-part sets) are off. Libraries will see no change in behavior until the options are enabled.

The ability to recognize the first available copy of a serial or multi-part set will depend on how libraries maintain their data. This document describes the new hold options, how they work, and what libraries can do to prepare their data for optimal results.

How does the system recognize a serial for first-available-copy requests?

By Issue data - If the item record is linked to a Serial Issue Record and has data in the Issue field, the system will treat a request on this item as a first-available-copy request. The linked bib may or may not be a serial (bib-level S). If the program finds other linked items with matching issue data attached to the same bib, the items will be eligible to fill the request.



The screenshot shows a software interface for setting circulation parameters. On the left is a vertical blue sidebar with several icons. The main area is titled "Circulation parameters" and contains several fields with dropdown menus and a text input field. The fields are: "Material type" (set to "Periodical"), "Loan period" (set to "Standard"), "Fine code" (set to "Periodical"), "Renewal limit" (set to "3"), "Stat code" (set to "(None)"), and "Name of piece" (an empty text box). At the bottom, there is an "Issue:" label followed by a text box containing "Vol. 9 (Mar. 2009)".

Circulation parameters	
Material type:	Periodical
Loan period:	Standard
Fine code:	Periodical
Renewal limit:	3
Stat code:	(None)
Name of piece:	
Issue:	Vol. 9 (Mar. 2009)

By Bib-level S - If there is no linked Serial Issue Record (SIR) and therefore no Issue data, but the bib level is S, the program will create a request for the specific item selected. It will not attempt a first-available-copy request.

Bibliographic Record

Control number: 199714 Owner: All Libraries (sys) Record status: Record

Title: Adirondack life. Display

Tag	Ind	Data
LDR		ca
001		19971
005		20051
008		76021
010		ta 7

LEADER - BIBLIOGRAPHIC DATA

Record status (05): c - Corrected or revised

Type of record (06): a - Language material

Bibliographic level (07): s - Serial

Type of control (08): - No specific type

How does the system recognize a multi-part set for a first-available-copy request?

If the bib record is any bib level other than S, and the linked items have data in the Vol field of the call number, the system will treat a request on this item as a first-available-copy request. If the program finds other linked items with matching Vol data on the same bib, the items will also be eligible to fill the request.

Bibliographic Record

Control number: 461020 Owner: All Libraries (sys) Record status: F

Title: Best in show [DVD] Display in PAC

Tag	Ind	Data
LDR		cgm 22
001		461020
005		20070910113
007		vd uvuizu
008		010516p2001
009		ta 070000014

LEADER - BIBLIOGRAPHIC DATA

Record status (05): c - Corrected or revised

Type of record (06): g - Projected medium

Bibliographic level (07): m - Monograph/item

Type of control (08): - No specific type

Call number

Scheme: Dewey Decimal

Prefix: DVD

Class:

Cutter: BEST

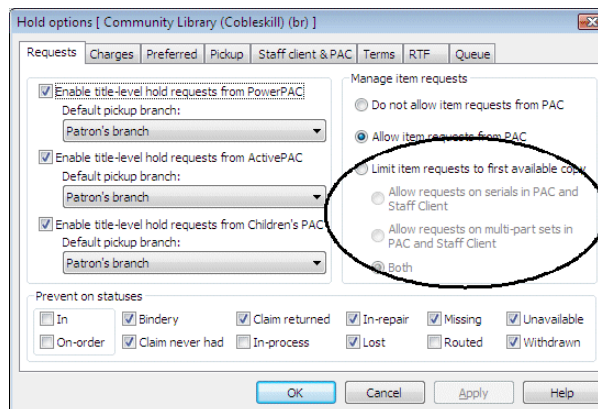
Suffix:

Vol: 2007

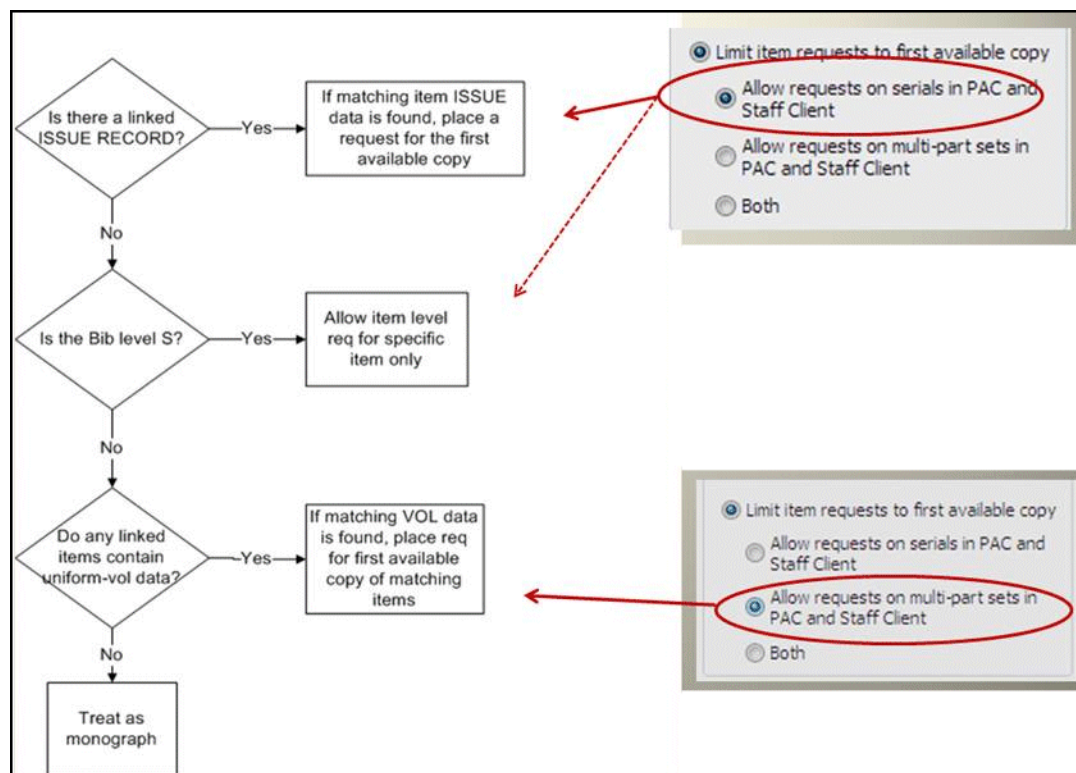
Copy: 1

Where do I set first available copy options?

In Polaris Administration, open the Holds options dialog box (**Request parameters**). First available copy options are available on the requests tabbed page.



The illustration shows how the settings affect request processing:



How does the program match data?

When looking at the Issue or Vol field to match a hold request, the program does a character-for-character match.

- Vol. 1 and Vol. 1 are a match
- V.1 and Vol.1 do not match
- ☐ Ignore case.
 - Vol. 1 and vol. 1 are a match.
- ☐ Ignore trailing spaces and spaces at the beginning.
 - [space] v.1 and [no space] v.1 are a match
 - v.1 [space] and v.1 [no space] are a match
- ☐ Internal spaces and all punctuation affect a match.
 - Vol 1 and Vol1 do not match
 - Vol.1 and Vol1 do not match

How can I prepare my data if I want to implement the options?

Issue data - Libraries that use Polaris Serials will have uniform data in the Issue field of their items. This will insure that like items linked to the same bib will be matched to fill a request.

Vol data - Libraries that do not use Polaris Serials, or who have item records for serial or monographic parts not controlled by serials, will need to standardize the data in their item Vol fields to ensure that matching items are identified for first-available-copy hold requests.

- Use the Find Tool or an SQL query to identify item records that need to be changed.
- Decide on a format for your data and use bulk change to systematically change the data in your item records' Vol fields.

This document includes some SQL queries that will help you analyze your data and create record sets for bulk change. See "[Sample SQL Queries](#)" on page 6.

What if I have non-volume data in my Vol field?

Values that do not clearly identify volumes will be problematic; here are some examples:

- Storage
- Withdrawn
- Copy 1
- XXX

This kind of data in the Vol field of a monographic title will trigger a first-available-copy request when it is not appropriate to do so.

If any items contain this kind of value in the Vol field, delete it or move it another field, for example, the Copy field of the call number or the Shelf Location field.

Sample SQL Queries

Here are some SQL queries that you can copy and paste into the Polaris Find Tool to help you identify item records with Vol data.

In each query except the first one below, which is not organization-specific, you would modify the final line, and only the final line, to customize the query for different Libraries, Branches or variations on data in the Volume field. For example, 'vol%' will retrieve vol, VOL, Vol., vol:, volume, and so forth.

Note that the statement . . . like 'vol%' can be modified to . . . like '%vo%l' in order to capture data within a string. For example, %sup% will retrieve vol . 3 suppl 1; 2006 supplement; Issue 6 sup 1; vol.1suppl.

Survey Queries to Analyze Records

Show all branches that have items containing data in the Vol field.

This will give all organizations with records having data in the volume field, where the MARC bib level is not equal to 's'.

```
select cir.ItemRecordID as RecordID
from Polaris.Polaris.CircItemRecords cir with (nolock)
inner join Polaris.Polaris.ItemRecordDetails ird with (nolock)
on (cir.ItemRecordID = ird.ItemRecordID and VolumeNumber is Not null)
inner join Polaris.Polaris.BibliographicRecords br with (nolock)
on (cir.AssociatedBibRecordID = br.BibliographicRecordID and br.MARCBibLevel != 's')
inner join Organizations branch with (nolock)
on (cir.AssignedBranchID = branch.OrganizationID and branch.OrganizationCodeID = 3)
inner join Organizations library with (nolock)
on (branch.ParentOrganizationID = library.OrganizationID and
library.OrganizationCodeID = 2)
```

Note:

In this query it is not necessary to specify an organization.

Tell me if any particular branch has item records containing data in the Vol field.

This will give a particular branch (by abbreviation) with volume field data, where the MARC bib level is not equal to 's'.

```
select cir.ItemRecordID as RecordID
from Polaris.Polaris.CircItemRecords cir with (nolock)
inner join Polaris.Polaris.ItemRecordDetails ird with (nolock)
on (cir.ItemRecordID = ird.ItemRecordID and VolumeNumber is Not null)
inner join Polaris.Polaris.BibliographicRecords br with (nolock)
on (cir.AssociatedBibRecordID = br.BibliographicRecordID and br.MARCBibLevel != 's')
inner join Organizations branch with (nolock)
on (cir.AssignedBranchID = branch.OrganizationID and branch.OrganizationCodeID = 3)
inner join Organizations library with (nolock)
on (branch.ParentOrganizationID = library.OrganizationID and
library.OrganizationCodeID = 2)
where branch.Abbreviation = 'DUA'
```

Important:

Change the branch.Abbreviation in the last line from 'DUA' to your appropriate branch abbreviation.

Item Searches Based on Vol Information

For all branches, show item records attached to non-serial bibs, with Vol data starting with x.

This is a wildcard search of volume number where the volume number starts with vol. for all branches, where the MARC bib level is not equal to 's'.

```
select cir.ItemRecordID as RecordID
from Polaris.Polaris.CircItemRecords cir with (nolock)
inner join Polaris.Polaris.ItemRecordDetails ird with (nolock)
on (cir.ItemRecordID = ird.ItemRecordID and VolumeNumber is Not null)
inner join Polaris.Polaris.BibliographicRecords br with (nolock)
on (cir.AssociatedBibRecordID = br.BibliographicRecordID and br.MARCBibLevel != 's')
inner join Organizations branch with (nolock)
on (cir.AssignedBranchID = branch.OrganizationID and branch.OrganizationCodeID = 3)
inner join Organizations library with (nolock)
on (branch.ParentOrganizationID = library.OrganizationID and
library.OrganizationCodeID = 2)
where VolumeNumber like 'vol.%'
```

Important:

You can change the VolumeNumber in the last line from 'vol.%' to the string that suits your purposes.

For any specific branch, show item records attached to non-serial bibs, with Vol data starting with x.

This is a wildcard search of volume number where the volume number starts with **vol.** for the branch **DUA**, where the MARC bib level is not equal to 's'.

```
select cir.ItemRecordID as RecordID
from Polaris.Polaris.CirclItemRecords cir with (nolock)
inner join Polaris.Polaris.ItemRecordDetails ird with (nolock)
on (cir.ItemRecordID = ird.ItemRecordID and VolumeNumber is Not null)
inner join Polaris.Polaris.BibliographicRecords br with (nolock)
on (cir.AssociatedBibRecordID = br.BibliographicRecordID and br.MARCBibLevel != 's')
inner join Organizations branch with (nolock)
on (cir.AssignedBranchID = branch.OrganizationID and branch.OrganizationCodeID = 3)
inner join Organizations library with (nolock)
on (branch.ParentOrganizationID = library.OrganizationID and
library.OrganizationCodeID = 2)
where VolumeNumber like 'vol.%'
and branch.Abbreviation = 'DUA'
```

Important:

You can change the VolumeNumber in the next-to-last line from 'vol.%' to the string that suits your purposes. Change the branch.Abbreviation in the last line from 'DUA' to your appropriate branch abbreviation.

For any Library and its branches, show item records attached to non-serial bibs, with Vol data starting with x.

This is a wildcard search of volume number where the volume number starts with **vol.** for all branches for the library **SCPL**, where the MARC bib level is not equal to 's'.

```
select cir.ItemRecordID as RecordID
from Polaris.Polaris.CirclItemRecords cir with (nolock)
inner join Polaris.Polaris.ItemRecordDetails ird with (nolock)
on (cir.ItemRecordID = ird.ItemRecordID and VolumeNumber is Not null)
inner join Polaris.Polaris.BibliographicRecords br with (nolock)
on (cir.AssociatedBibRecordID = br.BibliographicRecordID and br.MARCBibLevel != 's')
inner join Organizations branch with (nolock)
on (cir.AssignedBranchID = branch.OrganizationID and branch.OrganizationCodeID = 3)
inner join Organizations library with (nolock)
on (branch.ParentOrganizationID = library.OrganizationID and
library.OrganizationCodeID = 2)
where VolumeNumber like 'vol.%'
and library.Abbreviation = 'SCPL'
```

Important:

You can change the VolumeNumber in the next-to-last line from 'vol.%' to the string that suits your purposes. Change the library.Abbreviation in the last line from 'SCPL' to your appropriate library abbreviation.