Polaris® Serials Guide

POLARIS
LIBRARY SYSTEMS
Count on us.

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Contents

About This Guide

This guide explains how to set up serials processing in Polaris and how to check in, claim, and route serial issues. To do the serials processing tasks in this guide, permissions must be set for your user name and workstation. If you have questions about permissions in Polaris, see your Polaris administrator.

Serials Topics

Important:
For information about developments that may have occurred after this information was published, go to www.polaristown.com and select Documentation.

This guide covers the following topics:

Getting Started in Serials Overview of Polaris Serials; how to search for and display Serials records.

Setting Up Serials Records How to set up Polaris to manage and process serials, including procedures for creating serial holdings records, publication patterns and pattern templates, and serial item templates.

Managing Subscriptions Creating subscription records; viewing, renewing, and canceling subscriptions from the Subscriptions List.

Checking In Serials Checking in issues and parts; printing labels for issues and parts.

Claiming in Serials Claiming serial issues that were not received as expected.

Routing Serial Issues Setting up route lists; printing route slips to attach to magazines, journals, or other material that is routed to staff members and patrons.

Serials Shortcut Keys List of shortcut keys formatted for convenient printing and clipping.

Serials Administration Settings that control how Polaris data is categorized, used, and stored, and what functions are available to staff and patrons.

Serials Permissions, Parameters, and Profiles The permissions, parameters, and profiles that are set to administer and maintain the Serials subsystem in Polaris Administration.

Related Resources

In addition to this guide, the following resources may be helpful when using Polaris Serials:

- Polaris Online Help

  Polaris online Help is accessible from the Help menu on any Polaris window or by pressing **F1** with a Polaris window active. It provides information and instructions for the Polaris staff client subsystems, and Polaris administration (includes administration and customization options for the staff client, PAC applications, and other Polaris functions).

- Polaris Staff Client
  - *Polaris® Acquisitions Guide*
  - *Polaris® Basics Guide*
  - *Polaris® Cataloging Guide*
- Library Polaris Administrator

  If you have questions about using Polaris, contact your Polaris administrator or trainer at the library for help.

- Polaris Library Systems Web Site

  For updated user and support information, go to **www.polaristown.com**.

  You can also contact your Site Manager at:

  1-877-857-1978.

Getting Started in Serials

To help you manage serials processing more efficiently, Polaris automates and streamlines the following processes:

- **Setting up serials processing** - Create serial holdings records and publication patterns for automatic prediction. Serial issues are created automatically from the publication pattern. Specify how your serial holdings will display in the PAC. See “Setting Up Serials Records” on page 17.
- **Managing subscriptions** - Subscription records, which are optional in Polaris, provide an easy way to renew or cancel subscriptions. In addition, you can create purchase orders automatically upon renewal of the subscription. Once you create subscription records for your serial titles, you can manage all of your subscriptions using the Subscription List. See “Managing Subscriptions” on page 66.
- **Checking in serial issues and standing order parts** - Check in issues or parts, create item records automatically, and generate labels. See “Checking In Serials” on page 76.
- **Routing serials** - Set up route lists with standard text, routing information, and the individuals to whom the items should be routed. The route slip can be printed when the issue is checked in. See “Routing Serial Issues” on page 106.
- **Claiming serials** - When issues are not received as expected, you can claim them. In Polaris Administration, you can set up claiming to be automatic or manual. When Polaris is set up to do automatic claiming, a claim is automatically e-mailed to the supplier when the issue is not received by a specified number of days after the expected date. With manual claiming, the issue appears on the Claim Alert List where you can select the issue and claim it. The claiming data is set up in the Supplier record, and it is copied to the Serial Holdings record where you can add more claiming intervals. See “Claiming in Serials” on page 96.
- **Deleting issues no longer retained** - When serial issues are no longer retained by your library, you can delete the serial issue records. See “Delete single or multiple serial issues/parts” on page 90.

This unit covers the following topics:

Terms

serials A serial is a publication issued over a period of time, usually on a regular basis (for example, weekly) with some sort of numbering that identifies issues (for example, volumes, issue numbers, dates). A serial, unlike other multi-volume publications such as encyclopedias or the complete works of literary authors, does not have a foreseeable end. Examples of serials include popular magazines (*Newsweek*), scholarly journals (*Journal of the American Medical Association*), electronic journals (*The Scientist*), and annual reports.

SICI The acronym for Serial Item and Contribution Identifier. You can search for serial holdings records and issue records using this number, which some vendors print directly on the journal. The SICI is the SISAC barcode. The SICI incorporates the ISSN and is used on scholarly, technical, medical and other subscription based serials.

SISAC Serials Industry Systems Advisory Committee.

standing order A library may set up a standing order for titles which are published infrequently (annually, for example) or irregularly. The volumes are supplied as they are published and are paid for as they are received. In Polaris, standing orders are used only for ordering monographic series, where each piece is cataloged separately with its own bibliographic record.

Select this order type only when you are ordering parts in a monographic series for which there is an overall title, but each volume has its own title. You can link a purchase order line item to the series as a whole, release the purchase order and encumber funds for the whole series, or you can prepay the order. Then, create a Serial Holdings Record for the series in Serials. When the standing order parts come in, check them in on the Serials Check-In workform, not by receiving in Acquisitions. You link the standing order parts to existing bibliographic records, or create new brief bibliographic records. Finally, you copy only the standing order parts that were received (checked in) over to the invoice and pay for the parts. The rest of the standing order remains encumbered. When you roll over to a new fiscal year, standing order amounts will be re-encumbered in the new fiscal year.

subscription A library places a subscription for newspapers, magazines and scholarly journals. The subscriptions are usually paid in advance of receiving the first issue.

Use subscription orders to pay for subscriptions with issues that can be predicted. You can renew subscriptions in Serials and opt to create purchase orders automatically. When you pay for a subscription, the total amount is disencumbered. You check in subscription issues via Serials, and item records may be generated.

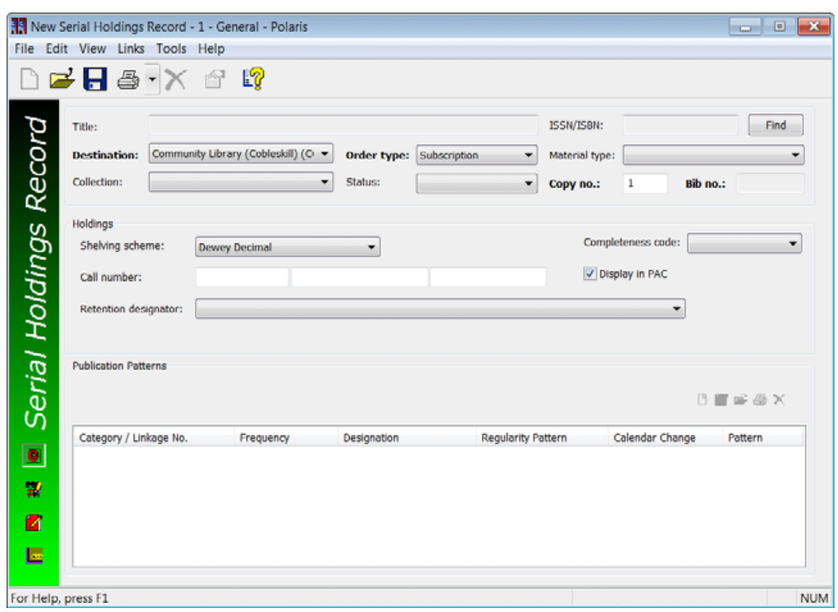
Serials Record Types

Polaris Serials records facilitate your library's serials processing activities. Some Serials records are also linked to Cataloging or Acquisitions records. You can access Polaris Supplier records from the Serials or Acquisitions menu. For more information on Supplier records, see "Setting Up Supplier Records" in the *Polaris Acquisitions Guide 4.1R2*.

Serial Holdings Records

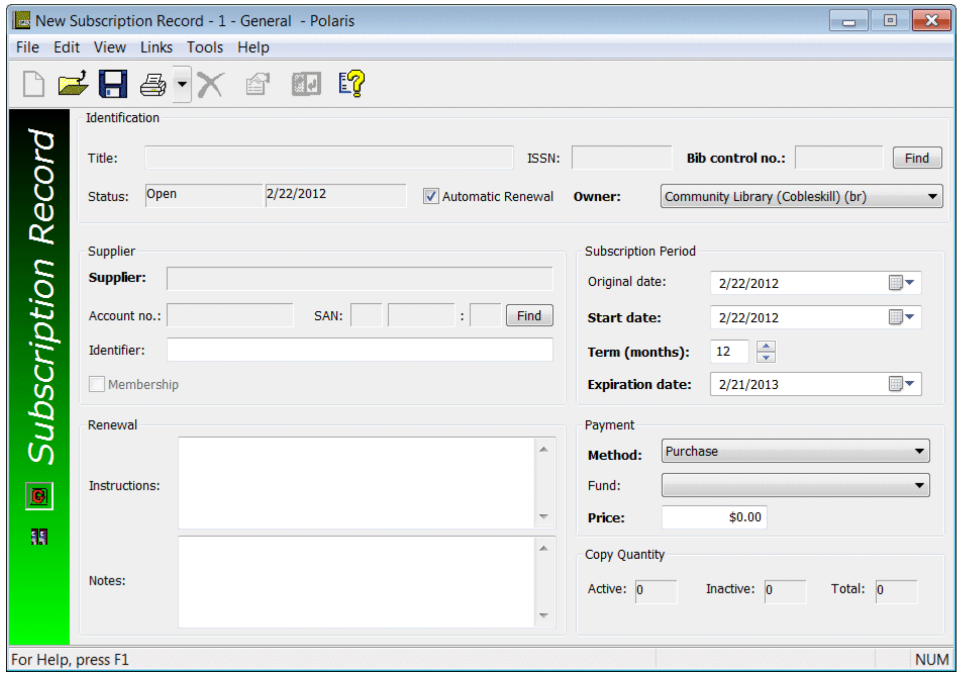
Serial holdings records are linked to the bibliographic record for the serial title in the Polaris database. The publication pattern (enumeration and chronology) is defined in the serial holdings record, and subscription issues or standing order parts are created automatically from the publication pattern that predicts their arrival. A single serial holdings record can have multiple publication patterns to predict supplements or indexes published on a different schedule than the basic bibliographic unit, or if there is more than one basic bibliographic unit. Each copy of the serial title has a separate serial holdings record with a distinct copy number.

The retention designator and the **Display in PAC** settings apply only to checked in serial issues, not standing order parts. If you have the **Display in PAC** setting turned off (unchecked), no issues that are linked to this serial holdings record will display in the PAC. If the **Display in PAC** setting is turned on (checked) in the serial holdings record, the issues will display in the PAC according to the settings in the **Retention Designator**. Standing order parts are monographic, so they are displayed (or suppressed from display) according to the **Display in PAC** setting in the bibliographic or item record.



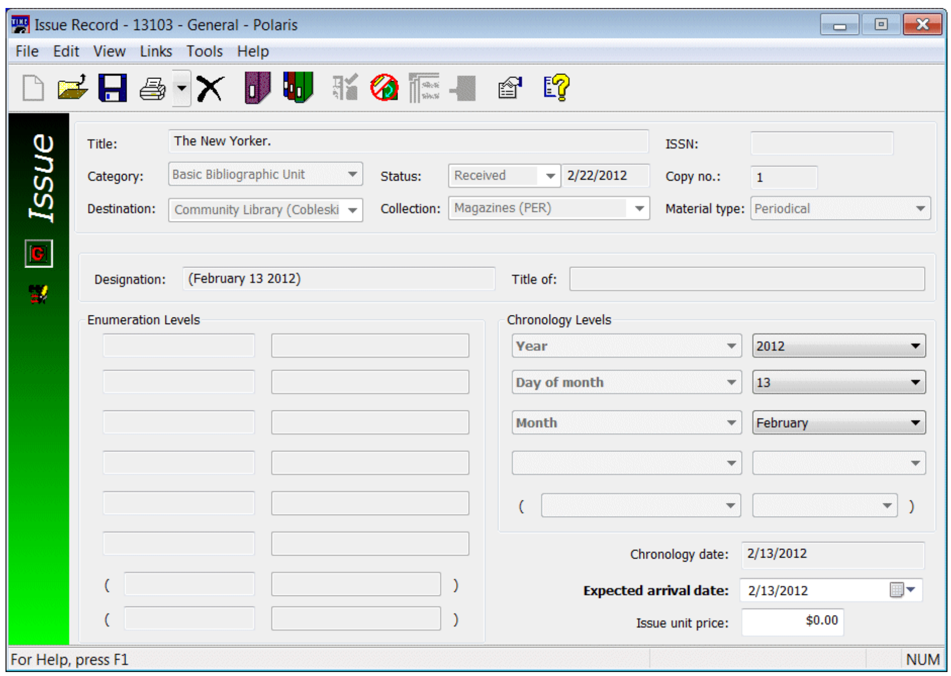
Subscription Records

Subscription records are optional in Polaris, but they are necessary to track renewals or create purchase orders automatically when subscriptions are renewed. Serial holdings records can be linked to a subscription record.



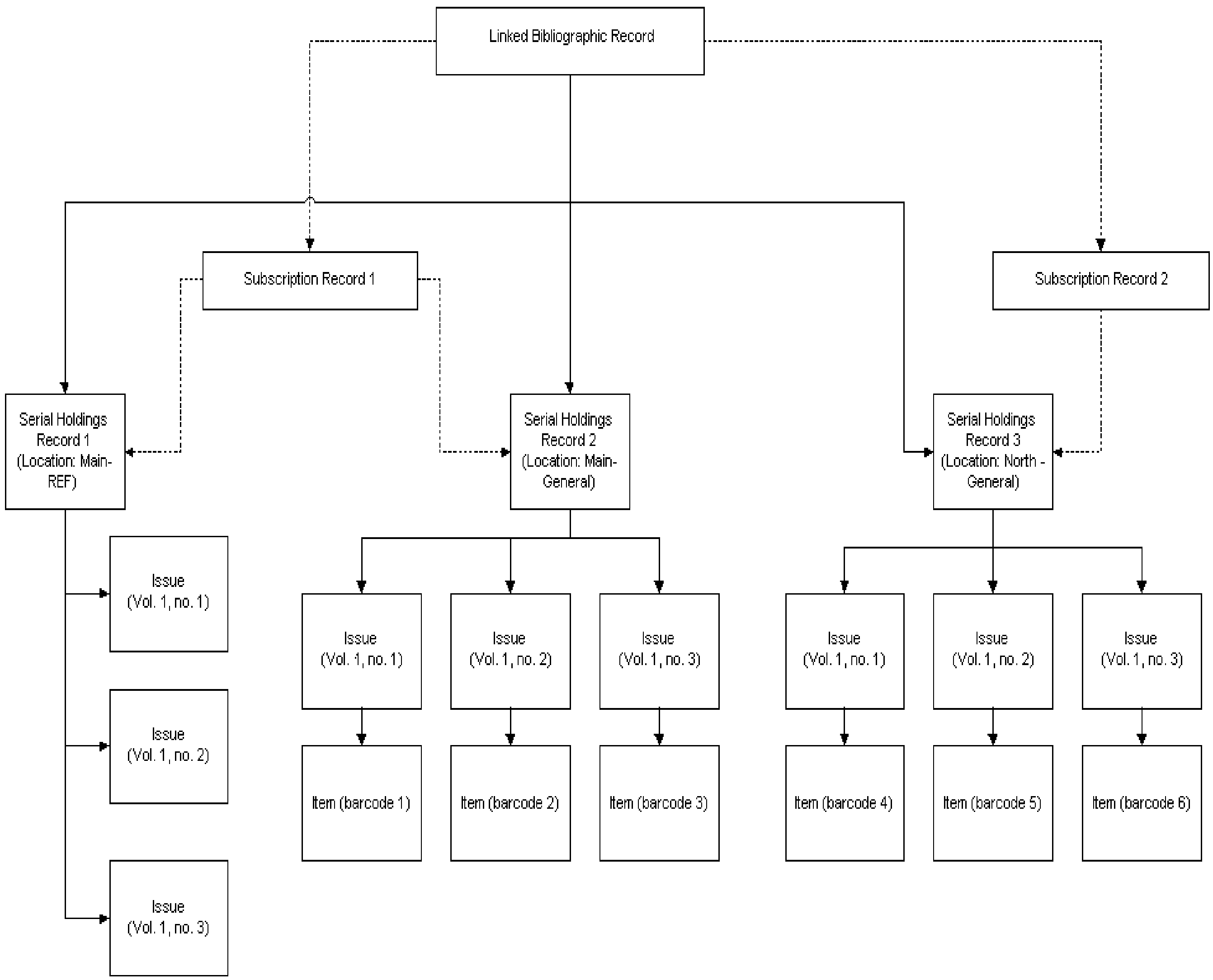
Issue Records

Issue records represent the published serial issues (pieces) that are received and managed in your library. Each issue is linked to a serial holdings record, and the issue record inherits the title information from the serial holdings record. The issue record contains issue-specified information such as its status (Expected, Pending claim, Claimed, Never published, Not available, Received), exact publication information (enumeration, chronology, chronology date, publication date), public and non-public notes, and the arrival date. If an issue is to be circulated, or the library wishes to retain in-house use statistics, an item record is linked to each issue record during the receiving (check-in) process. If the issue has been claimed, the claiming history appears in the Claims view of the Issue workform. When an issue is routed, the route status appears on the Notes view of the Issue workform. The issue record can also be linked to an invoice, allowing its payment to be tracked in the Acquisitions subsystem.



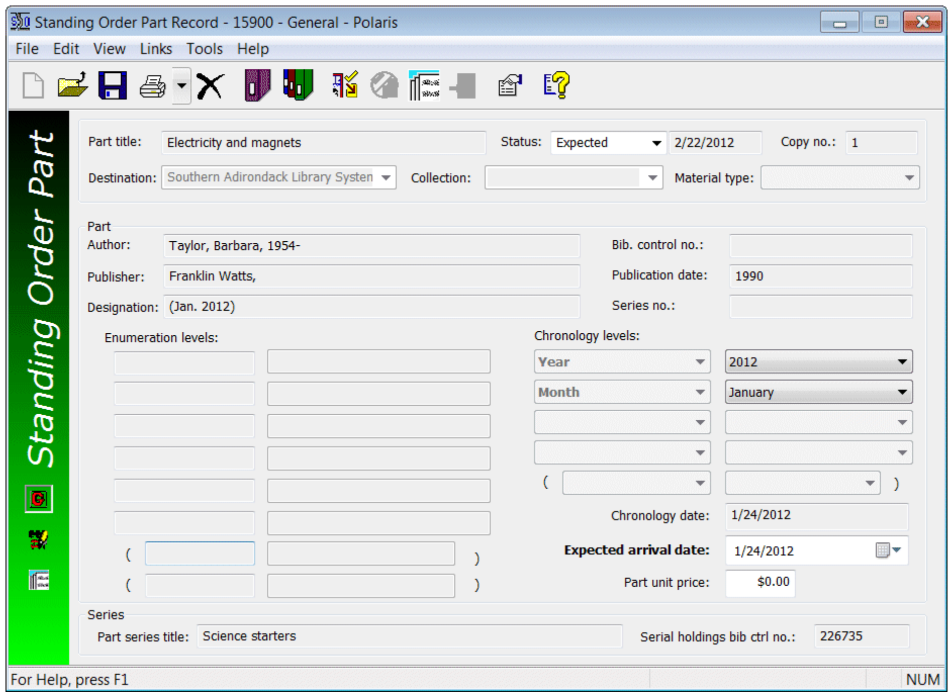
Subscription Record Relationships

Polaris manages subscriptions using two levels of records: serial holdings records, and issue records. You may also use subscription records if you want to maintain renewal history or subscription data, or if you want to create purchase orders automatically upon renewal of a subscription. If you circulate issues, you must create item records.



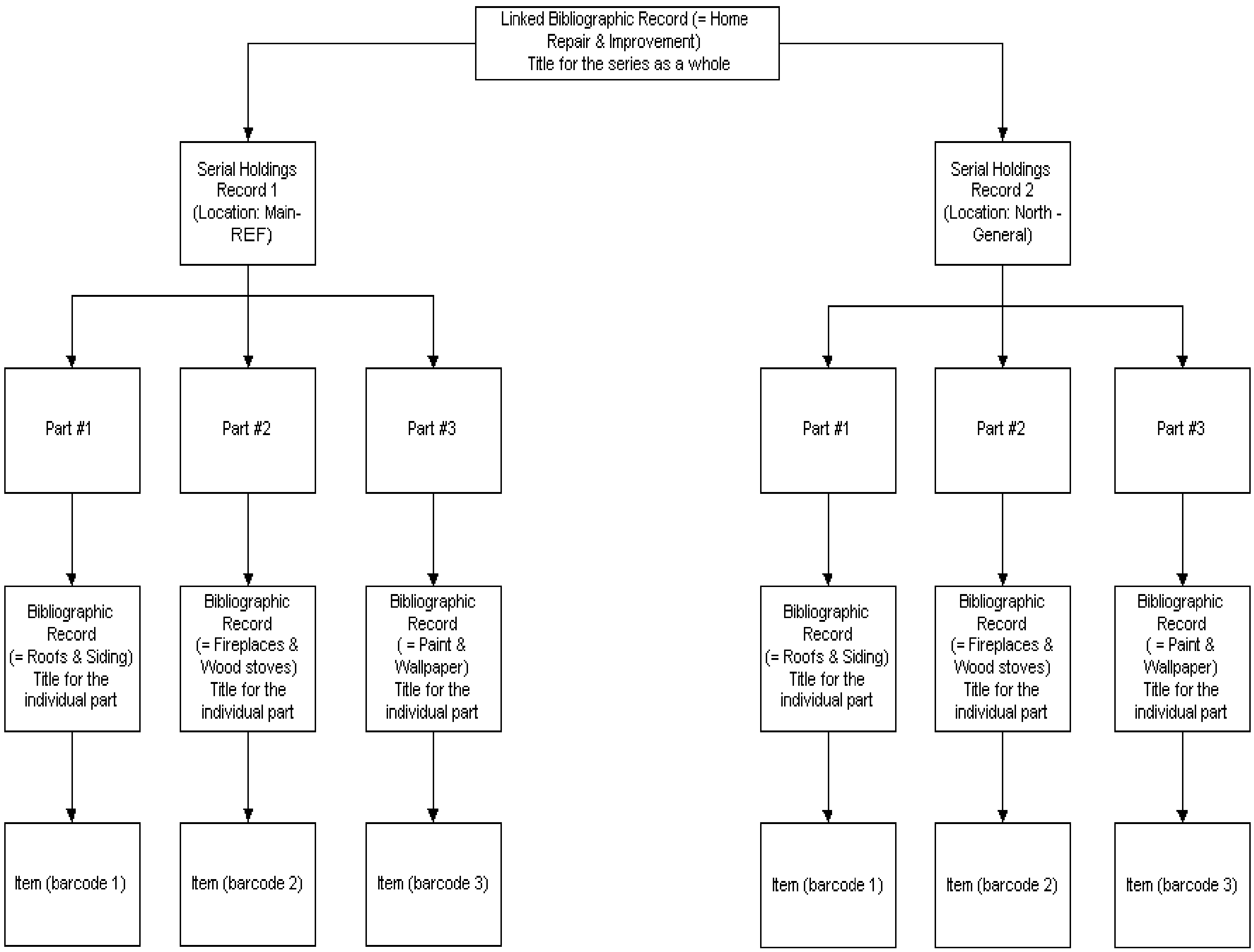
Standing Order Part Records

Standing order part records represent the published volumes of a monographic series. They track the receipt of the volumes, and each standing order part record contains the specific enumeration and or chronology of the piece. During standing order part check-in, a bibliographic record for the part is created or linked to the standing order part. Each standing order part representing the volume is linked to the serial holdings record representing the series. The standing order part can also be linked to an invoice, allowing its payment to be tracked in the Acquisitions subsystem. In addition, item records can be linked to each standing order part record during the receiving (check-in) process.



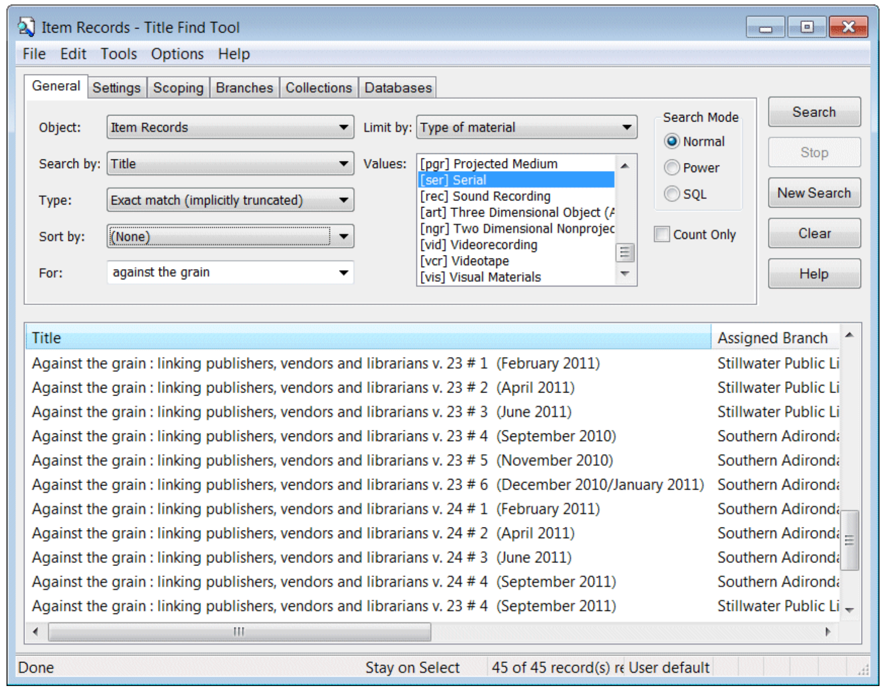
Standing Order Record Relationships

Like subscriptions, standing orders have two levels of records: serial holdings records and part records. However, standing order processing requires a link to the purchase order line item segment at the serial holdings record level.

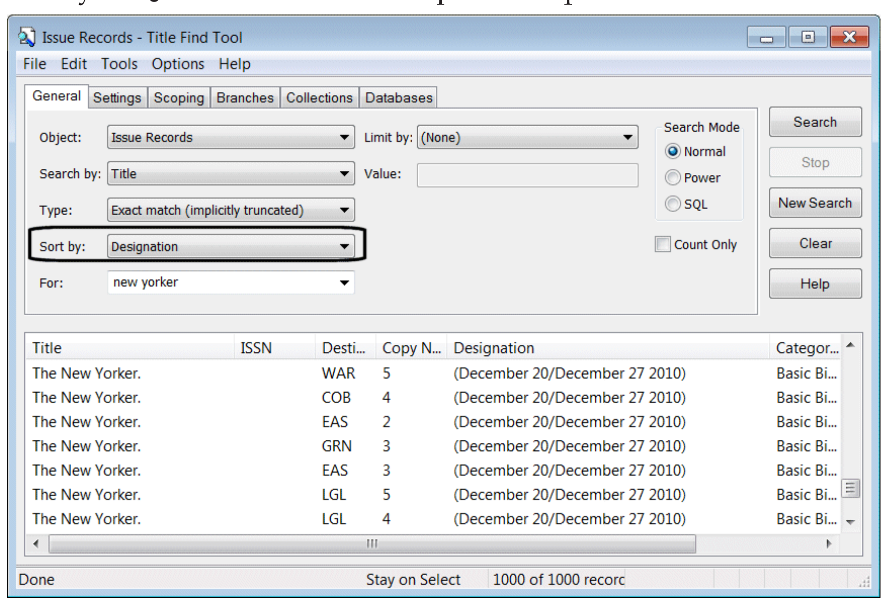


Tips for Viewing the Issue Designation in the Find Tool

- **Searching for Serial Items** - When serial items are displayed in the Find Tool, you may need to expand the title column (by dragging the column border to the right) to see all the designation information because the designation is appended to the title.



- **Searching for Serial Issues** - When you search for serial issues, you can sort by **Designation** to see all the copies of a specific issue.



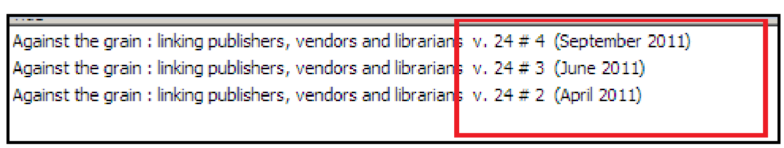
Issue Designation Display

The serial issue's designation (enumeration and/or chronology) appears in the following areas:

- Item Find Tool results list - See "Tips for Viewing the Issue Designation in the Find Tool" on page 11.
- Issue Find Tool results list - See "Tips for Viewing the Issue Designation in the Find Tool" on page 11.
- Subscription/Standing Order Check In workform
- Check Out & Check In workforms
- Request Manager
- Patron Status Workform - Items Out, Account Claims Holds, Reading History
- Item Record Set workform
- Outreach Services workform
- Course Reserves workform
- Items Pending list
- Patron checkout list
- Patron holds list
- Patron account portion of Polaris PowerPAC
- Item-level request page of Polaris PowerPAC
- The Issue field in the Item Record workform.
- Hold Request workform
- Hold Request Find Tool results
- Notices - Items Out Reminder Notice, Overdue Notices, Bill
- Notice, Holds Notice, Claim Notice
- Receipts & Slips - Check-out Receipt, Holds Slip, In-transit Slip
- Blocks & Hold message dialogs

Note:

The enumeration and chronology is not a separate column of data, as it is appended to the Title.



Serials Workflow Overview

Tip:
To customize workflow and streamline operations, see "Serials Permissions, Parameters, and Profiles" on page 134.

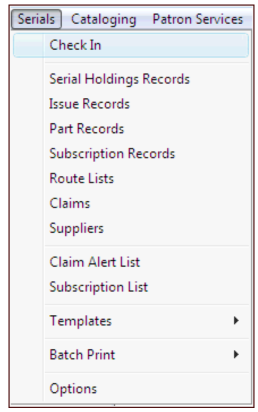
1. Create or import bibliographic records (if they do not already exist) for each serial title held by the library. See "Creating MARC Records" in the *Polaris Cataloging Guide 4.1R2* or "Importing Records" in the *Polaris Cataloging Guide 4.1R2*.
2. Set up templates for common publication patterns, for example, weekly publications. Once you have set up publication pattern templates, you can select them from a list in the serial holdings record. You can also set up a publication pattern in the serial holdings record for a specific title. See "Creating Publication Pattern Templates" on page 53.
3. Set up supplier records for each of your serial vendors. If you claim serials, set up the claiming information on the Supplier workform. See "Create a new supplier record" in the *Polaris Acquisitions Guide 4.1R2*.
4. Create a serial holdings record for each serial title, and copy the record for each copy of the title. For example *Time Magazine* at the Main Street branch would have a different serial holdings record from *Time Magazine* at West Street branch. Specify a publication pattern for the expected serial issues. If you claim serials issues/parts, and you want to add more claiming intervals than are available on the Supplier record, add more claiming intervals on the Serial Holdings record. See "Displaying Serial Titles in the PAC" on page 19.
5. (Optional) If you claim serials issues/parts, set up claiming to be automatic or manual, and specify the notification method. See "Set up claiming notification" on page 132.
6. (Optional) If you circulate any serial titles, set up serial item templates. See "Creating Serial Item Templates" on page 60.
7. (Optional) If you want to track subscription renewals or create purchase orders automatically when subscriptions are renewed, create a subscription record. See "Managing Subscriptions" on page 66.
8. (Optional) If you want to route serial issues, set up route lists that contain the text, routing information, and names of the individuals to whom you want to route issues. See "Creating Route Lists" on page 107.
9. As issues/parts are delivered to the library, check in the issues/parts using the Check In workform. See "Checking In Serials" on page 76.
10. (Optional) Print serials labels and route slips.

Starting a Serials Task

To access existing Serials records, select the type of record from the Serials menu on the Polaris Shortcut Bar, and then use the Find Tool to search for the specific record. See “Finding Polaris Records” in the *Polaris Basics Guide 4.1R2*. You also access other Serials functions, such as the Claim Alert List and the Subscription List, from the Serials menu. To create a new record, select **File**, **New**.

Tip:
Click the green orb to see the Serials toolbar.

Hover the cursor over the icons to see their functions.



Start a Serials task

Follow these steps to start a task in Serials.

Note:
For more information on basic Polaris functions, see “Getting Started in Polaris” in the *Polaris Basics Guide 4.1R2*.

1. Log on to Polaris.

   The Polaris Shortcut Bar appears.

Tip:
Press **ALT+S** to display the Serials menu.

2. Start one of the following serials tasks:
   - **Create a serial holdings record for a serial title** - Select **File**, **New**, **Serial Holdings Record**. Issue and part records are created from serial holdings records. See “Setting Up Serials Records” on page 17.
   - **Create a subscription record for a specific title** - Select **File, New Subscription Record**. See “Create a subscription record” on page 67.
   - **Create a new supplier record** - Select **File, New, Supplier**. See “Create a new supplier record” in the *Polaris Acquisitions Guide 4.1R2*.
   - **Create a new route list for routing serial issues** - Select **File, New, Route List**. See “Creating Route Lists” on page 107.
   - **Receive a serial issue or part** - Select **Serials, Check In**. See “Checking In Serials” on page 76.

- **Find an existing serials record** - Select **Serials,** select the record type, and use the Find Tool to search for the record. See "Find serial records" on page 15.
- **Renew or cancel one or more subscription titles** - Select **Serials, Subscription List**. See "View the Subscription List" on page 71.
- **View, edit, and create publication pattern templates** - Select **Serials, Templates, Publication Patterns**. See "Create a publication pattern template" on page 53.
- **Claim a serial issue or part** - Select **Claim Alert List**. See "Claiming in Serials" on page 96.
- **Batch print cancellation notices or route slips** - Select **Serials, Batch Print**, **Cancellation Notices** or **Route Slips**.
- **Generate a serials report** - Select **Utilities**, **Reports**, **Serials**. Select the report from the list. See "Serials Reports" in the *Polaris Basics Guide 4.1R2*.

Find serial records

Follow these steps to find and access serial records.

1. Select **Serials** from the Polaris Shortcut Bar.

   The Serials menu appears.

2. Select one of the following menu options: **Check In, Serial Holdings Records, Issue Records, Part Records, Subscription Records, Route Lists, Claims,** or **Suppliers.**

   Note:
   If you select **Claim Alert List**, a list shows the issues or parts that were not received as expected and are eligible to be claimed. If you select **Subscription List**, a list of subscriptions appears. If you select **Templates**, **Publication Patterns**, a list of publication patterns appears if you have created them. **Batch print** lets you print cancellation notices and routing slips in batches. **Options** opens the Label Setup dialog box.

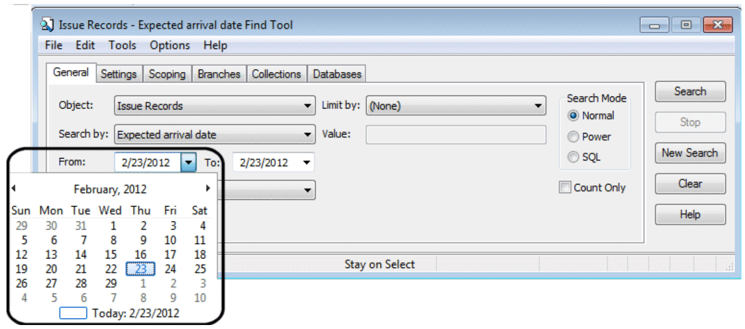
   The Polaris Find Tool appears with the type of record you selected in the **Object** box.

3. Select the access point, in the **Search by** box, to search for the serial record.

   Note:
   When you search by date, the Find Tool expands to allow you to enter a date range. For example, you can search for issue or part records by the expected arrival date.

Tip:
If you routinely search for serials records using the same search by criteria, select **Options, Save as User Default.** See "Finding Polaris Records" in the *Polaris Basics Guide 4.1R2* for more information on the Find Tool.

Tip:
If the periodical has a SICI barcode, you can scan it to find the issue, serial holdings record, or check in record.



4. Select the type of search in the **Type** box.

   Note:
   The available search types depend on the object selected.

5. If you want to sort the results before they display, select a sort option in the **Sort by** box.

   Example:
   If you are searching for serial issues, select **Designation** to sort by the enumeration and chronology.

6. If you want to narrow your search, select an option in the **Limit by** box and select or type a limit by value in the **Value** box. For example, you might limit the search by a specific owning branch.

7. Type a search string in the **For** box.

8. Click **Search**.

   A list of serial records matching your search criteria appears in the Find Tool results list.

Tip:
Press **CTRL+A** to load all the records in the Find Tool results list.

9. Double-click an item in the results list to open the record, or right-click and select **Open** from the context menu.

   The record appears in the corresponding workform.

Setting Up Serials Records

Serial holdings records with publication patterns are required for serials processing in Polaris. Once serial holdings records are set up, issue and part records are predicted and created automatically. Other optional serial records, such as subscription records, serial item templates, and route lists can be set up to facilitate serials processing.

> **Important:**
> Staff members who handle serials must have the required permissions set in Polaris Administration. In addition, Polaris Administration parameters and profiles control how information is displayed and processed in Polaris Serials. See "Setting Up the Check In Prompt" on page 124.

After the appropriate serials processing options and permissions have been set in Polaris Administration, the next step is to create serial holdings records for the serials titles in your library. A serial holdings record contains the title, copy, order, and supplier information for a serial title. It also specifies the publication pattern so that issues or parts can be predicted automatically. The information in serial holdings records, combined with Polaris Administration settings, control the display of serials in Polaris PowerPAC and Mobile PAC.

Next, you can create optional serials records, such as item templates for automatically creating serial item records at check in (if your library circulates or tracks serials), and subscription records to manage all your library's subscriptions from one list. Finally, you can set up serials claiming, serials labels, and route lists.

You have various options when paying for subscriptions in Polaris Acquisitions. If you are using Subscription records, you can automatically create renewal purchase orders when you renew a subscription. If you are not using Subscription records, you can use a prepaid purchase order that automatically creates an invoice and expends the funds, or you can create an invoice without a purchase order. The invoice for the subscription may have line items linked to serial holdings records (see "Add an invoice line linked to a subscription" in the *Polaris Acquisitions Guide 4.1R2*). Or, if you simply want to pay a supplier for all your subscription renewals in one step, you can create an invoice with a single line item unlinked to any bibliographic or serial holdings record. For more information, see "Creating Invoices" in the *Polaris Acquisitions Guide 4.1R2*.

This unit covers the following topics:

Terms

calendar change A two- or four-character numeric code that indicates the chronological point (day of month, month, or season) at which the highest level of enumeration (for example, **Volume**) increments or changes.

chronology The date(s) used by the publisher on a serially-issued bibliographic unit to help identify or indicate when it was published. The chronology may reflect the dates of coverage, publication, or printing.

chronology date The read-only internal date Polaris uses for displaying the issue or part in the correct order in the PAC, different from the chronology data of the issue. The format always displays as MM/DD/YYYY, whether or not all three levels of chronology are defined in the publication pattern. The chronology date uses the year selected in the first level of chronology if it is selected, or the current year if the year is not selected. If the month and day are not defined, the chronology date uses the month and day from the publication pattern's start date.

designation The enumeration and/or chronology grouped together and listed on the serials record. Also referred to as "Issue" outside of Serials.

enumeration The designation reflecting the alphabetic or numeric scheme used by the publisher on an item or assigned when the holdings statement is created, to identify the individual bibliographic or physical parts and to show the relationship of each unit to the unit as a whole.

frequency The interval at which a publisher distributes a serial publication.

regularity Describes the regularity of the publishing pattern specified in the frequency.

textual holdings A textual description of the holdings of a basic bibliographic unit, supplement or index in the library collections. The textual holdings field in the Serial Holdings Record is used to record the retrospective holdings (all issues received or held in the library before issues were generated in Polaris).

Displaying Serial Titles in the PAC

When a patron searches for a serial title in the PAC, the results display according to settings in Polaris Administration and in the Serial Holdings Record. In addition, the compressed holdings statement is generated through the Build up Compressed Holdings statement SQL job. For more information on jobs, see "Polaris SQL Jobs Reference" in the *Polaris Administration Guide 4.1R2*.

PAC Profiles Affecting Serials Display

The display of serial titles can be configured at the title level for Polaris PowerPAC and Mobile PAC. However, the item availability display can be configured only for Polaris PowerPAC.

Serial Title Display in PAC

Titles are displayed according to settings in the **Title Display: Configure** profiles for PowerPAC and Mobile PAC. The profile has selections for configuring the Brief (serial) display, the Full (serial) display, and the Summary (serial) display. If the bibliographic record's LDR07 has b, i or s, the title displays according to the title configuration settings for serials. If the LDR07 has anything else, the title displays according to the configurations for monographs. For more information on title display options for serials titles, see "Configuring the PowerPAC Title Display" in the *Polaris Public Access Administration Guide 4.1R2* and "Configuring the Mobile PAC Title Display" in the *Polaris Public Access Administration Guide 4.1R2*.

Tip:
The compressed holdings are built based on the retained issue records using the organization in the linked serial holdings record. If the assigned branch in the linked item record is changed, the item record's organization can be different from the linked serial issue, making the item's availability inconsistent with the compressed holdings statement in the PAC display.

Serial Item Availability Display in PowerPAC

Item availability display for serials in Polaris PowerPAC is also affected by the following the following PowerPAC profiles:

Note:
For more information on availability display options for serials issues, see "Set up the local/system item availability display" in the *Polaris Public Access Administration Guide 4.1R2*.

- **Item Availability: Expand serials titles** - If this profile is set to **Yes**, when you click **Availability** the location-specific compressed holdings statement and all the issues that are retained will display. If it is set to **No**, when you click **Availability** you see only the location-specific holdings information. Click **+** to see individual issues. You can have separate settings for monographic and serials items. The profile **Item Availability: Expand non-serials titles** can be set to **Yes** so that patrons do not need to click again to see more information. At the same time, the **Item Availability: Expand serials titles** can be set to **No** so that a compressed holdings statement appears for the serials title, and not all the issues.

- **Item availability: Display textual holdings notes** - The profile can be set to suppress or display textual holdings, display them with a pushpin icon that the user hovers over to display the textual holdings, or display the textual holdings immediately without the icon.
- **Item availability: Display notes** - This profile can be set to display or suppress item or issue public notes, display a pushpin icon that the user hovers over to see the notes, or display the notes immediately without the icon.

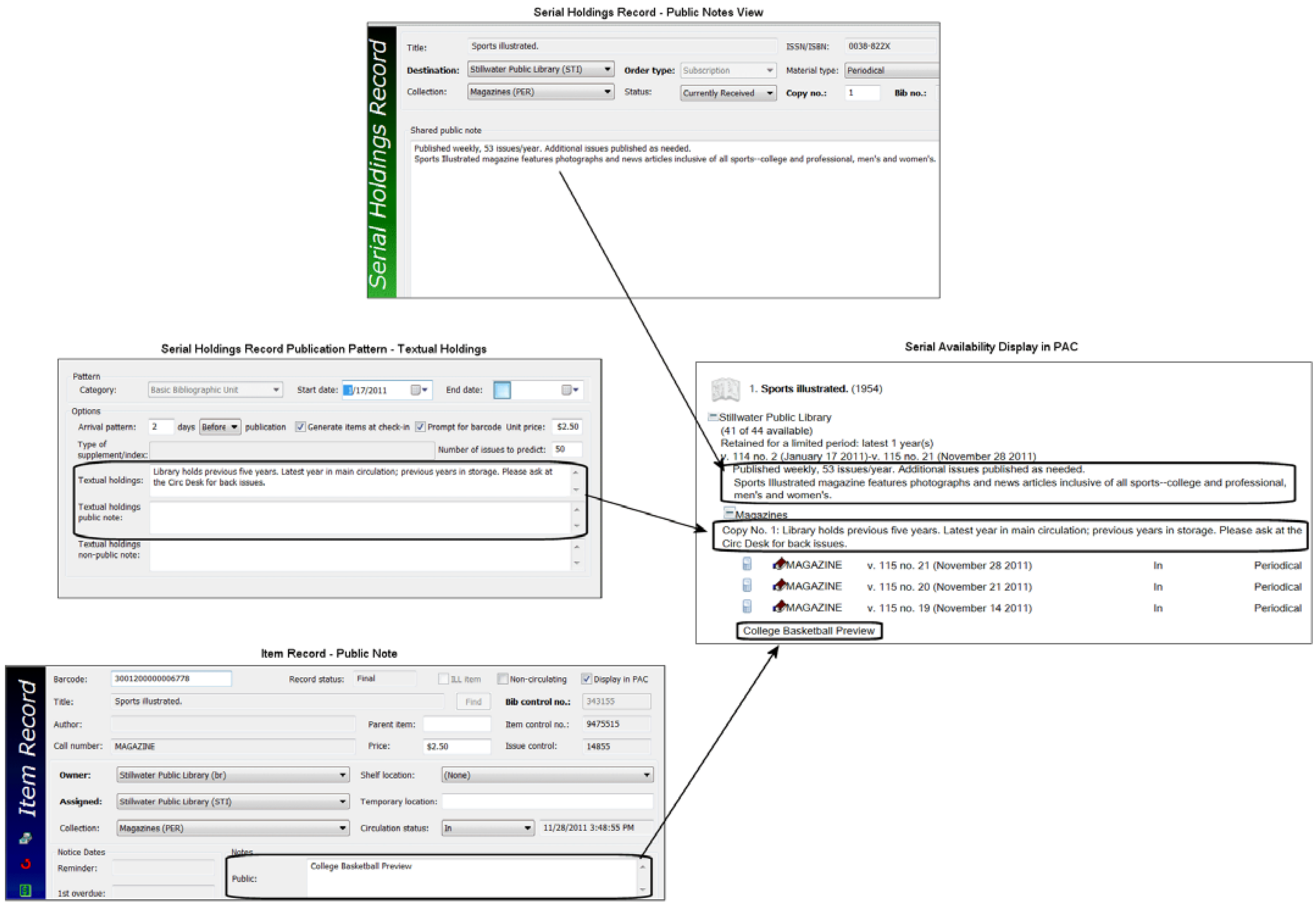
Serial Holdings Record Fields Affecting Serials Display in PAC

The display of serial holdings in PowerPAC and Mobile PAC also depends on the following elements in the Serial Holdings Record:

- **Retention designator -** Select **Retained for a limited period** on the General view of the Serial Holdings Record, and specify the range of issues your library retains. The retention information controls the branch-specific compressed holdings statement as well as the number of issues that display under the statement. If you have multiple serial holdings records for the same title and the same branch, but they have different retention periods based on collection, update one of these serial holdings records with the longest retention period. All the serial holding records for the same title and same owning branch share the retention information and the public note. When special or supplemental issues are checked in, the retention information may need to be changed. For example, if the issues are retained for 1 year, and the supplemental issue is checked in a year after the other issues, only the supplemental issue will display in the PAC. See "Create a serial holdings record" on page 25.
- **Display in PAC -** If this check box is unchecked, no issues will display in the PAC (unless there are linked item records that are set to display). If it is checked, the checked in issues display according to the retention information.
- **Public Notes** - You can enter holdings notes to display at the branch, collection, and/or issue level. The item availability PAC profiles in Polaris Administration control how these notes are displayed in the Polaris PowerPAC. See "PAC Profiles Affecting Serials Display" on page 19.
  - **Branch level** - To display notes at the branch level, enter the notes in the **Shared public note** box on the Public Notes view of the Serial Holdings Record.

    Note:
    The shared public note displays in the PAC even if the prediction pattern is closed and no active issues are linked to the serial holdings record. See "Displaying Issues from Ceased Publications in PAC" on page 22.
  - **Collection level** - To display notes at the collection level, enter them in the **Textual holdings** and/or **Textual holdings public note** in the publication pattern for the serial holdings record.
  - **Issue level** - To display notes at the issue or item level, enter them in the **Public notes** box in the serial issue or item. Notes in the issue record are copied to the item record.

This example shows a serial title's item availability display in the Polaris PowerPAC with the item availability profiles "display notes" and "display textual holdings notes" set to **Text**.



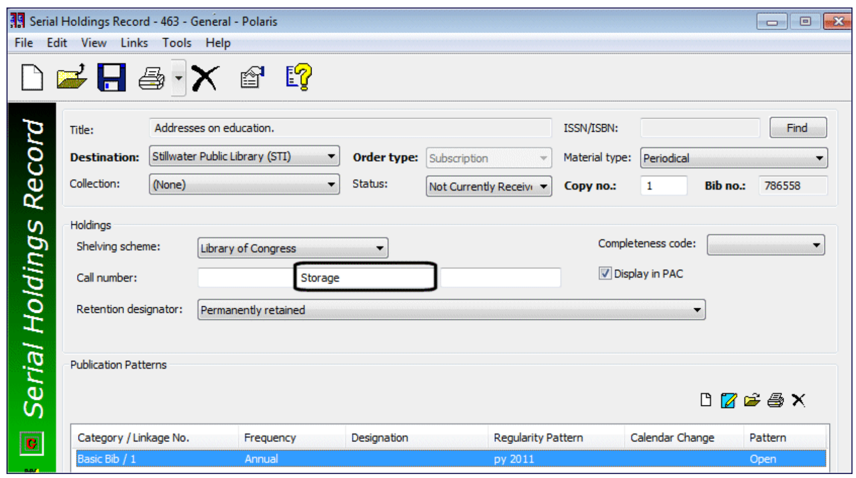
Displaying Issues from Ceased Publications in PAC

When your library no longer receives the publication or the publication has ceased, you can still display the title in the PAC with a note about your library's holdings. However, to display the public note in the PAC, at least one issue, with or without a linked item, must be generated and checked in for the public note to display in PAC.

Follow these general steps to display serial holdings notes for a serial title no longer being received.

1. Create a serial holdings record for the title.

Example:
The Call number **Storage** appears in the PAC, indicating the location of the back issues.



Tip:
The Shared public note appears in the PAC exactly as you type it in the Serial Holdings Record; the lines break in the same place in the PAC.

2. On the Public Notes view of the Serial Holdings Record workform, add a public note in the **Shared public note** box.

Example:

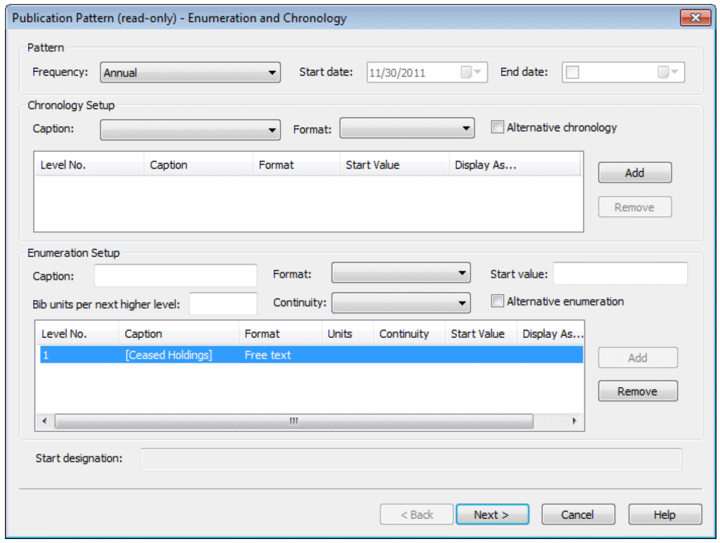
This periodical ceased publication June 2010.

Library holds the following back issues in storage: v.22, no.1 (Jan. 1997) - v.35, no.6 (Jun 2010)

Some issues missing.

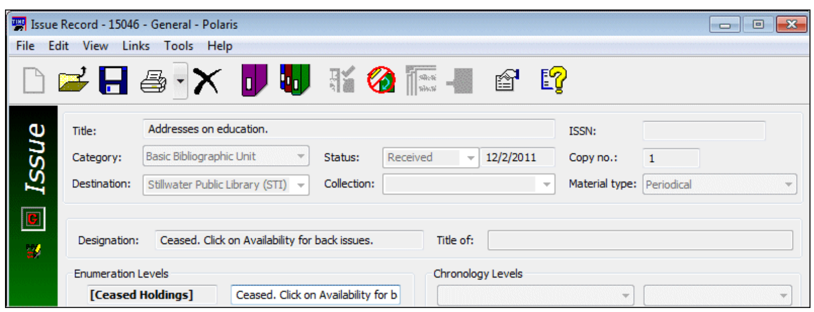
3. Create a publication pattern, and generate one issue.

Example:
Enter one level of free text enumeration such as [Ceased Holdings] and no chronology. The brackets prevent the enumeration from displaying.



4. Check in the issue. No linked item is needed.

Example:
In the Issue workform, enter the free text enumeration: **Ceased. Click on Availability for back issues.**



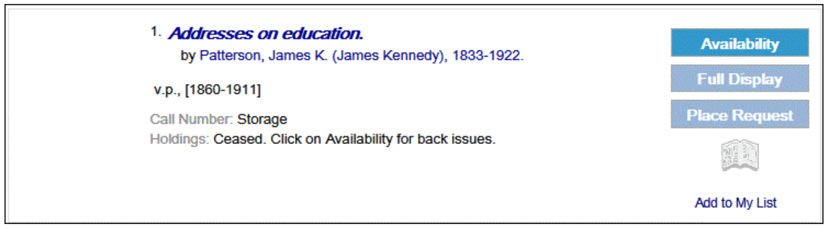
5. Check the PAC display. See "Example of PAC Display for a Ceased Serial Publication" on page 24.

Example of PAC Display for a Ceased Serial Publication

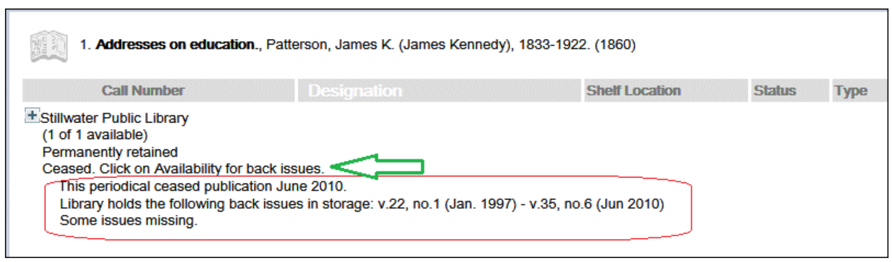
Under the serial title, the following displays:

Call number: Storage (from the call number in the General view of the Serial Holdings Record workform)

Holdings: Ceased. Click on Availability for back issues. (from the free-text enumeration in the Issue workform for the single issue)



The user clicks **Availability** and the note entered in the **Shared public note** field in the Serial Holding Record workform is displayed. The shared public note lists all holdings, formatted however the library wants to see them displayed.



Related Information

Hold Requests on Serial Items -The **Holds options** parameter in Polaris Administration can be set to allow only bibliographic-level holds for monographic items, but allow the first copy of a serial issue or volume in a multi-volume set (or both) to be held. For more information, see “Defining Hold Processing Options” in the *Polaris Patron Services Administration Guide 4.1R2*.

Creating and Copying Serial Holdings Records

A serial holdings record identifies a subscription to a serial title or a standing order for a monographic series. Each serial holdings record is linked to a bibliographic record in the Polaris database, as well as to one or more serial issues/parts. The serial holdings record enables automatic prediction of subscription issues and standing order parts by establishing the publication pattern and defining the chronology and enumeration.

Each serial holdings record linked to the same bibliographic record has a copy number that is unique for the destination library, collection, and material type. For example, if the branch has two copies of *Time Magazine* in the Periodicals collection, there will be two serial holdings records—copy 1 and copy 2. You can copy a serial holdings record to create a new one, and then change the copy number on the Serial Holdings Record workform before you save the new one.

1-2-3

Create a serial holdings record

The serial holdings record contains information regarding the serial title, copy, publication pattern, purchase order, and notes. Follow these steps to create a serial holdings record.

Note:
A final (not provisional) bibliographic record for the title must exist in the Polaris database before you can create a serial holdings record.

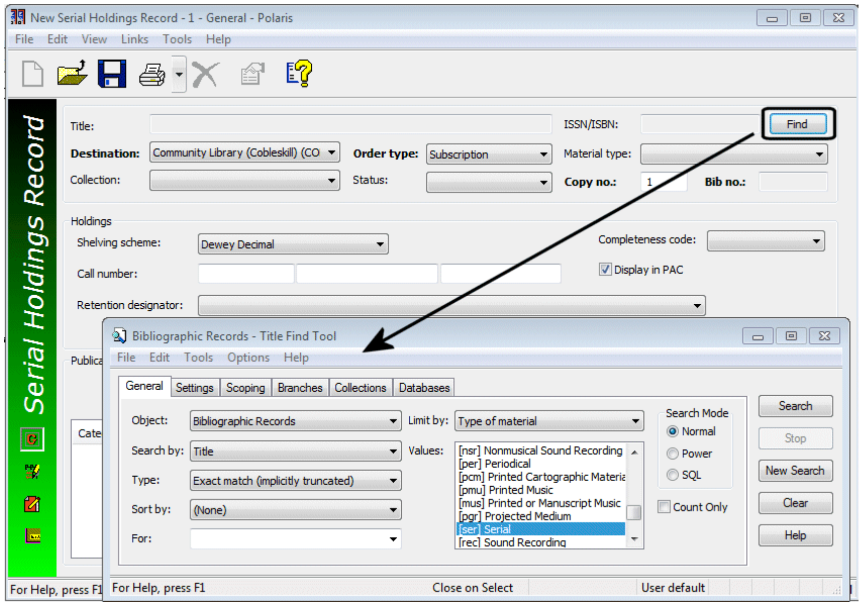
Tip:
To create a serial holdings record from a bibliographic record, press F12 to bring up the bibliographic record Find Tool, limit by **Type of Material, Serial**, enter other search criteria, and press **Search**. Right-click on the bib in the Find Tool results list, and select **Create, Serial Holdings Record.** Or, you can open the bib record and select **Tools, Create, Serial Holdings Record**. Then, go to step 6.

1. Select **File, New** from the Polaris Shortcut Bar, click , or press **CTRL+N** to display the New dialog box.
2. Select **Serial Holdings Record** from the **Objects** list, and click **OK**.

   The Serial Holdings Record workform appears.
3. Click **Find**.

   The Find Tool appears.

Tip:
In the Find Tool, select **Limit by** and select **Type of Material**, **Serial** to make sure you select a title coded as a serial. If you wish to select a title not coded as a serial, see the note in step 5.



4. Search for the bibliographic record (title) to which you want the serial holdings record linked.

   The Find Tool results list appears.

   Note:
   You cannot link a serial holdings record to a bibliographic record with a status of provisional or deleted.

5. Select the bibliographic record in the Find Tool results list and double-click, or right-click and choose **Select** from the context menu.

   The Serial Holdings Record workform appears with the bibliographic information from the title you selected.

   Note:
   If you selected a record that is not a serial, the following message appears: **This bibliographic record's leader is not a serial. Do you wish to continue?** Click **Yes** to continue the operation, or click **No** and select a serial record instead. You might select **Yes** if you are linking a non-serial bibliographic record for a standing order to a monographic series.

6. Select a destination library in the **Destination** box.
7. Select **Standing Order** or **Subscription** in the **Order Type** box.
8. Select a material type in the **Material Type** box.
9. Select a collection in the **Collection** box.
10. Select the status in the **Status** box.
11. Type a number in the **Copy no.** box that is unique for the title, destination library, collection, and material type.
12. Type a call number in the **Call no.** boxes.

    The call number is composed of a prefix, a classification number, and the cutter.

Tip:
When serial items are created, the call number is pulled from the serial holdings record. If the serial holdings record does not have a call number, it is pulled from the item template (if present). See "Create a serial item template" on page 61.

Tip:
The retention information is displayed in the compressed holdings statement in the PAC. It also limits the number of issues in the expanded view. The retention information and the public note are at the branch level, not the collection level. See "Displaying Serial Titles in the PAC" on page 19.

13. Select the shelving scheme in the **Shelving Scheme** box.

    Note:
    If the shelving scheme is defined in the Polaris Administration Cataloging profile, **Default shelving scheme for new item and holdings records**, the shelving scheme is selected automatically.

14. Select the completeness code in the **Completeness Code** box.

15. Select a description for the retention policy in the **Retention designator** box. If you select **Retained for a limited period**, the **Previous retained** and **Latest retained** boxes appear.

16. If you selected **Retained for a limited period** in the **Retention designator** box, do the following steps:

    a) Select **Previous** or **Latest**.

    Note:
    Although the MARC Format for Holdings standard specifies that *latest* includes the current issue while *previous* does not, Polaris includes the current issue in the retention. The issues display in the PAC the same way whether you choose **Previous** or **Latest**.

    b) Type a number, and select a category next to **Previous** or **Latest**.

    Example:
    Latest 5 Years indicates your library retains all the issues for the last five years.

17. To prevent all issues that are linked to this Serial Holdings Record from displaying in the public access catalog, if they do not have linked items, clear the **Display in PAC** check box. You can clear this check box when you have issues that do not circulate and do not have linked item records. See "Displaying Serial Titles in the PAC" on page 19.

18. Select **File, Save** to save the Serial Holdings Record.

    The Serial Holdings Record is saved if there are no other serial holdings records with the same bibliographic ID, copy number, destination, collection, material type, and order type.

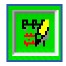
Tip:
If you want to add the serial holdings record to a subscription record, select **Tools, Add to Subscription Record**, and select the subscription record from the Find Tool. See "Create a subscription record" on page 67.

19. Set up the publication pattern for the Serial Holdings Record using one of the following methods:
    - "Use a template to create a publication pattern" on page 32.
    - "Specify the publication pattern for a serial title" on page 36.

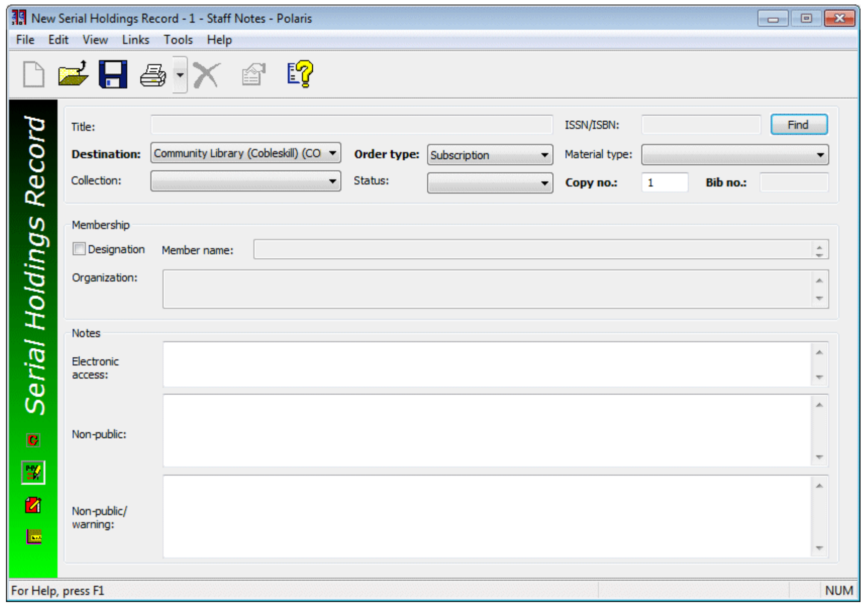
20. Enter staff and public notes following these procedures:
    - "Enter staff notes for a serial holdings record" on page 28
    - "Enter public notes for a serial holdings record" on page 29
    - "Enter order data for a serial holdings record" on page 30

Enter staff notes for a serial holdings record

Follow these steps to enter notes for a serial holdings record.

1. Open the Serial Holdings Record workform, and click **View, Staff Notes** or click .

   The Staff Notes view appears.



2. If the serial is received as part of a membership in a professional organization, select the **Designation** box, type the name of the member in the **Member name** box, and the organization name in the **Organization** box.
3. In the **Electronic access** box, type the URL, listserv, or e-mail address used to manage online journal subscriptions or standing orders.
4. If you want to include notes for staff members, type them in the **Non-public note** and/or **Non-public/warning note** boxes. These notes appear on the Serial Check-In workform.

   Note:
   Notes can be entered with carriage returns for display in the Serial Check-In workform.

5. Save the serial holdings record.

Enter public notes for a serial holdings record

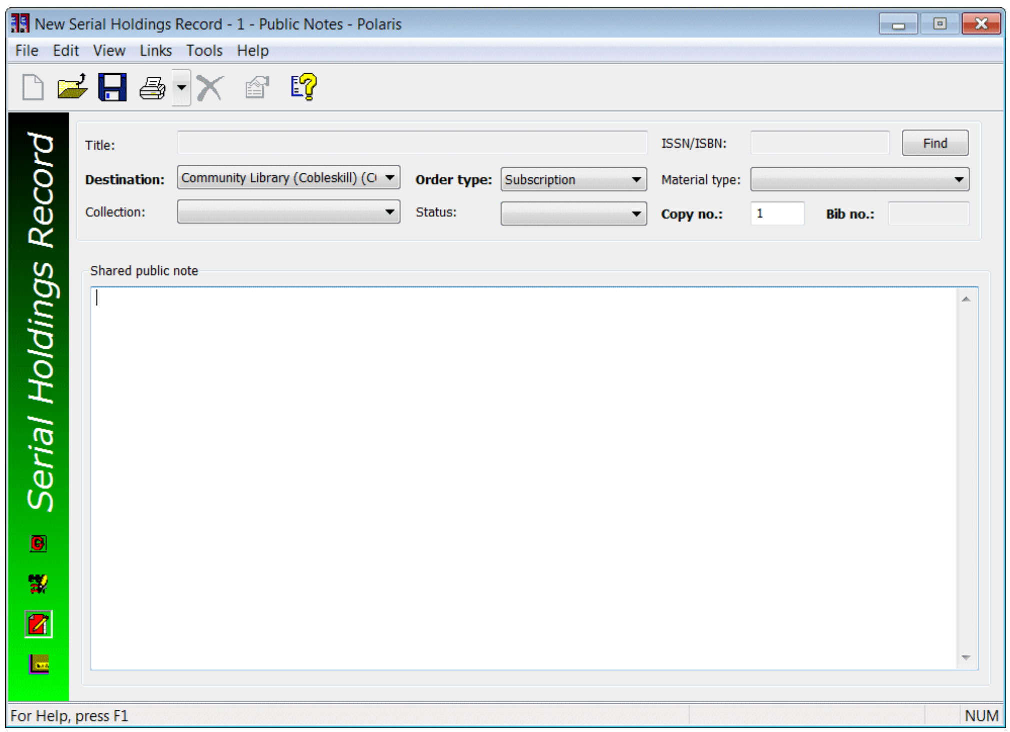
If the serial title is set to display in PAC and at least one issue is generated and checked in, the notes entered on the Public Notes view appear in Polaris PowerPAC and Mobile PAC at the serial title's branch level display. See "Serial Holdings Record Fields Affecting Serials Display in PAC" on page 20.

Follow these steps to enter public notes for a serial holdings record.

Important:
At least one issue, with or without a linked item, must be generated and checked in for the public note to display in PAC. You can enter free-text enumeration, such as *This publication has ceased*, and a call number, such as *Storage*, to indicate it is not a real issue.

1. On the Serial Holdings Record workform, select **View, Public Notes** or click 

   The Public Notes view appears.



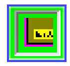
2. Type a note in the **Shared public note** box. You can enter up to 4,000 characters. Press **Enter** to go to the next line, and the line breaks will display in the PAC as they are entered in the **Shared public note** box.
3. Save the serial holdings record.

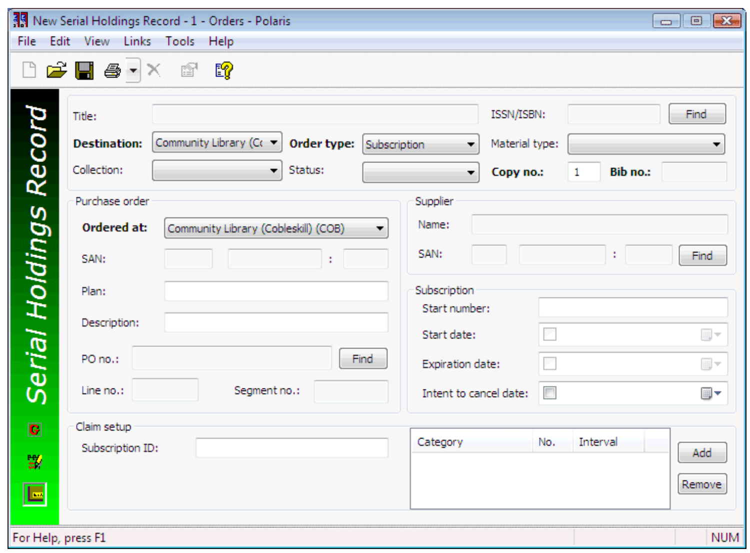
1-2-3

Enter order data for a serial holdings record

You can enter order data for a Serial Holdings record and link to a purchase order line item segment. Follow these steps to enter the order data for a serial holdings record.

> **Important:**
> You can save a serial holdings record for a subscription without linking to a purchase order line item segment, but a serial holdings record for a standing order must be linked to a purchase order line item segment before it can be saved.

1. Open the Serial Holdings Record workform, and select **View**, **Orders** or click  to display the Orders view.



2. Click **Find** next to the **PO no** box in the Purchase order section to search for the purchase order line item segment.

   If the purchase order line item has one segment, the information from that segment is automatically brought into the serial holdings record. If it has multiple segments, a dialog box appears with a list of segments, and you select a segment from the list. If no purchase order line item segments match the destination and collection, an error message appears.

   When you link to a matching purchase order line item segment, the following boxes are automatically filled in on the Serial Holdings Record workform:

   - Destination (header)
   - Collection (header)
   - Ordered at (Orders view)
   - Plan (Orders view)
   - Supplier Name (Orders view)
   - Supplier SAN (Orders view)
   - Maximum no. of claims (Orders view)
   - Claim waiting period (Orders view)
   - PO no.
   - PO line no.
   - Seg. no.

3. Type the subscription start number in the **Start number** box.

4. If you have set up a subscription record for this serial title, select **Tools, Add to Subscription Record** to add this serial holdings record to the subscription record. See "Create a subscription record" on page 67.

   The **Start date** and **Expiration date** boxes are filled in with the information from the linked subscription record.

5. If you intend to claim issues, enter any additional claiming data. See "Enter claiming criteria in the serial holdings record" on page 100.
6. If applicable, enter a date in the **Intent to cancel** box.
7. Select **File, Save** to save the serial holdings record.

Copy a serial holdings record

If you hold multiple copies of the same serial title, you can create a serial holdings record for one of the copies of the title, and then duplicate that record as many times as needed. Each copied record must have at least a different copy number, destination, or collection from the record being copied before it can be saved. When you save a new serial holdings record, Polaris checks to make sure another serial holdings record does not exist with the same title, copy number, destination library, collection, and material type. The publication pattern is also copied to the new serial holdings record. To change the publication pattern, see "Changing a Publication Pattern" on page 46.

Follow these steps to copy a serial holdings record.

1. Open the Serial Holdings Record workform for the record you want to copy.
2. Select **File, New**.

   The New Serial Holdings Record dialog box appears.

3. Click **Copy Existing Workform** (default).
4. Click **OK**.

   The Serial Holdings Record workform appears.

5. Change the **Copy No.**, **Destination**, **Collection, and Material Type** boxes as necessary.
6. Select **File, Save**.

   Note:
   If a purchase order line item segment is linked to the serial holdings record you are copying, Polaris checks the quantity ordered in the linked purchase order line segment. If the number of copies already linked is equal to the quantity ordered in the purchase order line, an error message appears. The new serial holdings record cannot be saved if it is a standing order because it is not linked to a purchase order line item. If the order type is Subscription, the serial holdings record can be saved, but it is not linked to the purchase order line item.

Tip:

Click on the toolbar at the top of the workform to create a record for the next serial holdings record. All the information, except for the order information, is copied to the new record, and you simply change the copy number, destination, and collection for the next serial holdings record.

Creating a Publication Pattern

To create a publication pattern for automatic prediction, you can use a publication pattern template, or you can specify the enumeration, chronology, frequency, and regularity for the serial title. A set of publication pattern template examples are available from Polaris Library Systems for training purposes. These templates can be used as an aid in serials prediction, but they should be tested by checking the prediction preview. If the publication pattern has changed since these templates were created, the library can update the template. When you create a new publication pattern for a serial title, you can save it as a template.

Use a template to create a publication pattern

Follow these steps to create a publication pattern for a Serial Holdings record using a publication pattern template.

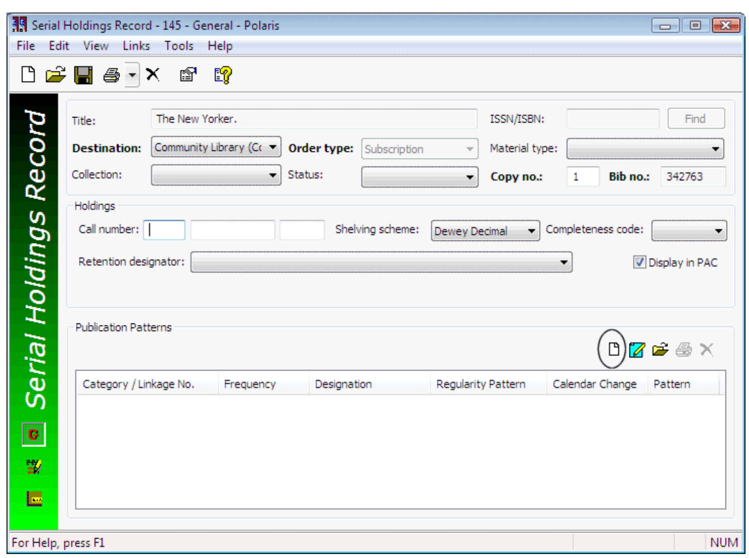
1. Search for and select the bibliographic record for the serial title, right-click, and select **Create, Serial Holdings Record**.

   Note:
   This is only one method for creating a serial holdings record. You can also select **File, New, Serial Holdings Record** from the Polaris Shortcut Bar and then link to the bibliographic record. For other methods of creating a serial holdings record, see *"Create a serial holdings record"* on page 25.

   A blank Serial Holdings Record workform appears.

Tip:
The bold type indicates information that is required before you can save the record.

2. Enter the required information and save the serial holdings record.
3. Click the **Add/Create Pattern** icon or press **CTRL+SHIFT+N**.



The Create Publication Pattern - Pattern Options window appears.

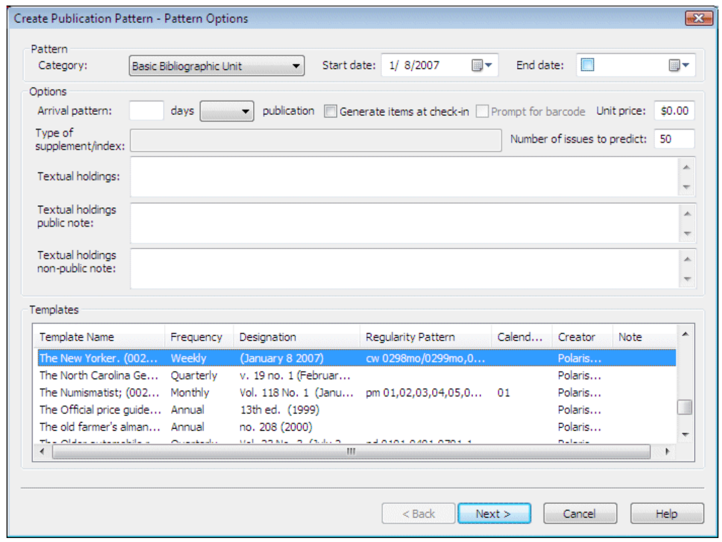
Tip:
Use the **Next** and **Back** buttons to navigate the wizard.

4. Click on the **Template Name** column to sort the titles alphabetically.

5. Click anywhere in the list of templates, and type the first letter of the template's name. The cursor will jump to the template name or close to it so you can find it quickly.

   Note:
   If you are using Polaris publication templates, some titles are listed under **The** because it is part of the actual title of the serial. *The New Yorker*, *The Atlantic Monthly*, *The Publisher's Weekly* are examples.

6. Select the template.

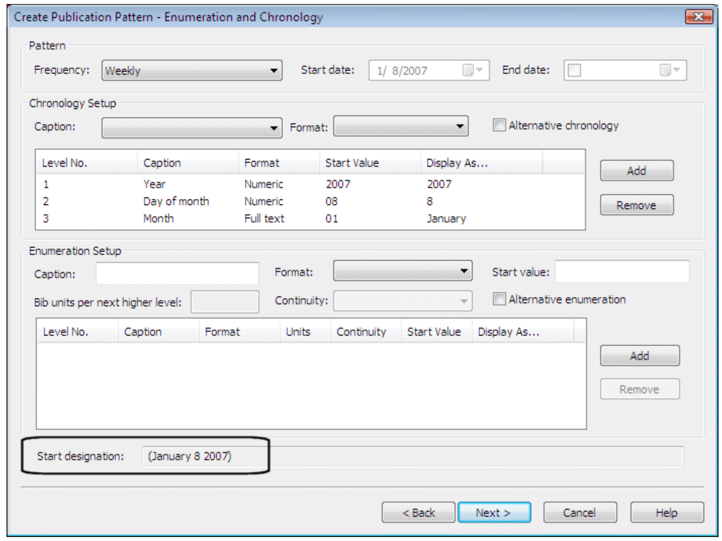


   Note:
   If you chose the wrong template, click the **Back** button and make another selection.

7. Click **Next**.

   The Enumeration and Chronology page appears, and the **Start designation** is displayed on the bottom of the page. The date in the **Start date** box defaults to the template's start date.

   Important:
   This is the start date of the template, not your subscription's start date. If your subscription begins after this start date, or the first issue you want to predict is after this date, do not change the start date. If you change the start date for a publication pattern template, you must re-enter the enumeration captions and values. Instead of changing the start date, remove the predicted issues that come before the first issue you want to predict. See step 13.

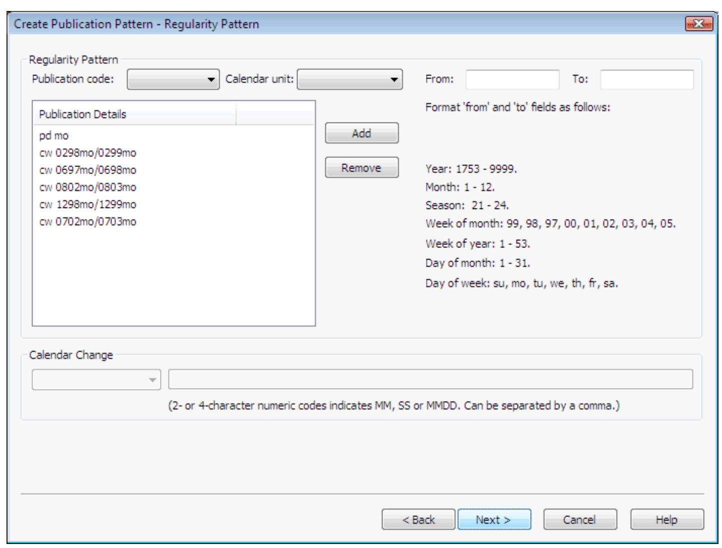


8. Check the enumeration and chronology. It is not necessary to change the enumeration and chronology if you want to start your expected issues after the template's start date. Simply remove the issues on the Prediction Results page of the Publication Pattern wizard. See step 13.

   Important:
   If you change the frequency of the pattern, the regularity is removed and another default regularity (to match the selected frequency) will take its place. Only change the frequency if the pattern template is not at all suitable. If you change the frequency by mistake, click **Cancel** on the last page of the pattern wizard and exit without saving the modified template.

9. Click **Next** to go to the next page of the wizard.

   The Regularity Pattern page appears with the publication details.



10. Click **Next** to go to the next page of the wizard.

    The Prediction Results page appears.

Tip:
If the predicted issues do not appear as you expected, click the **Back** button and make changes. If you click the **Cancel** button, the Publication Pattern wizard closes and your changes will not be saved.

11. Check the predicted issues and verify that they appear as expected.

    Important:
    If you used a template with a start date before the actual start of your subscription to this title, there may be issues prior to the issues you want to generate. You need to remove the predicted issues before clicking the **Finish** button.

12. If you want to see more issues than those displayed in the Prediction Results list, click **View More**.

    The number of issues that appear in the Prediction Results list is the number of issues that will be generated.

    Important:
    Keep clicking **View More** until you see the first issue you want to predict.

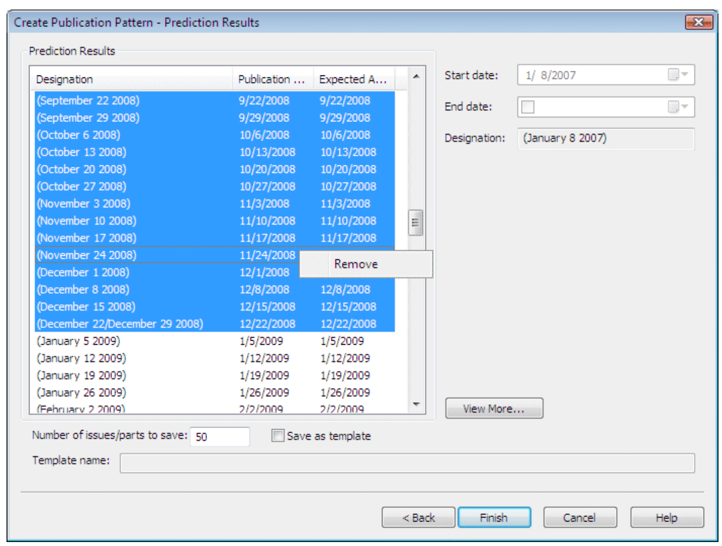
13. Remove all the predicted issues with dates before your subscription start date by doing the following steps:

  a) Select the issue directly above the first issue you want to generate.

  b) Press **CTRL+SHIFT+Home**.

  c) Right-click, and select **Remove**.

Tip:
This procedure only removes issues or parts from the predicted list; the issues or parts listed are not yet records in the Polaris system. When you have generated issues or parts records and you want to remove them, you delete them (see "Delete single or multiple serial issues/parts" on page 90).



After you remove issues, the **Number of issues/parts to save** box displays the number of issues remaining.

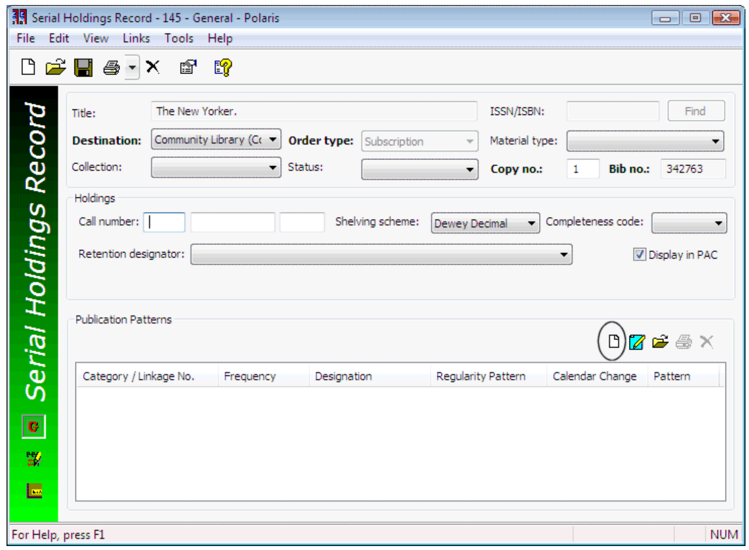
14. Click **Finish** to create the expected issues.

    The expected issues appear in the Check In workform. See "Checking In Serials" on page 76.

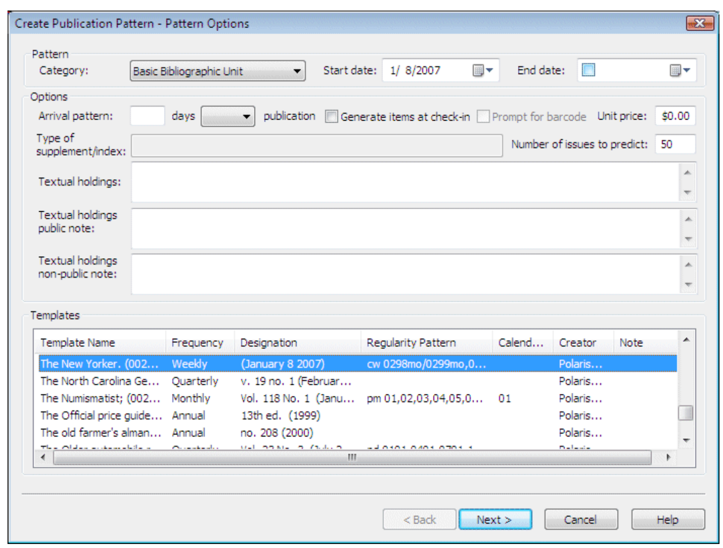
Specify the publication pattern for a serial title

Follow these steps to specify the publication pattern for a serial title.

1. Click in the Publication Patterns toolbar of the Serial Holdings Record workform.



The Create Publication Pattern - Pattern Options dialog box appears.



2. Select a category in the **Category** box to indicate that the publication pattern is for the basic bibliographic unit, a supplement, or an index.

Note:
You can have multiple runs for the Basic Bib, Index and/or Supplement with the same or different publication patterns.

Tip:
You can have different publication patterns for different categories of the same serial title. For example, you can indicate a frequency of **Monthly** for the basic bibliographic unit and **Annual** for the supplement.

3. Type or select a date when you want the publication pattern to begin in the **Start date** box.

   Note:
   The Start date is the current date if you are not using a publication pattern template. If you are using a publication pattern template, the Start date is the template's start date and should not be changed. See "Use a template to create a publication pattern" on page 32.

4. If you want to specify a date when you want the publication pattern to end, type or select a date in the **End date** box. An end date is not required.

5. In the **Arrival pattern** boxes, type the number of days and select **before** or **after** to indicate the amount of time between the publication date and the date the issue is expected in the library. The arrival pattern is used to calculate the expected arrival date.

6. If you want to prepare the issues of this serial holdings record for circulation as they are received, select the **Generate item records at check-in** box.

   Important:
   You must create a serial item template before you can create serial items automatically. See "Create a serial item template" on page 61.

7. If barcodes are applied and should be scanned at check-in, select the **Prompt for barcode on check-in** box.

   Note:
   The prompt for the barcode also includes a box for the issue unit price if the Serials parameter **Enter unit price at serials check-in** is set to **Yes**. If the parameter is set to **No**, when you check in a serial issue, the cursor goes to the barcode field, and you can scan in the barcode. If the parameter is set to **Yes**, when you check in a serial issue, the cursor goes to the price field. See "Setting Up the Check In Prompt" on page 124.

8. If you want the issues and the item records created from the issues to have a price, type the price per issue in the **Unit price** box.

9. If the category type is supplement or index, indicate the type in the **Type of supplement or index** box.

10. Type the number of issues or parts you want to predict in the **Number of issues/parts to predict** box.

    Note:
    The number of issues or parts that will be predicted also depends on the publication pattern, including the start and end dates. The default (50) is the maximum number of issues or parts that can be predicted.

Tip:
The retention information and public note in the serial holdings record display in the PAC at the branch level. If you have multiple serial holdings records for the same title and branch, but they are retained for different periods based on the collection, use the textual holdings notes to indicate the collection-specific retention.

11. If you want to record and display other holdings information, type the textual holdings in the **Textual Holdings** box. You can use this box for retrospective holdings information (the physical serial issues/parts your library holds for which there are no records in Polaris). Example: **v. 36-49 (1961-1994). Incomplete vols. unbound. Some issues missing.**

    Note:
    The textual holdings and the textual holdings public note display in the public access catalog after the serial holdings record public note, if there is one. The serial holdings record public note is at the branch level. See "Displaying Serial Titles in the PAC" on page 19.

12. If you want to enter a public note, type it in the **Public note** box.

13. If you want to enter a note that is displayed for staff only, use the **Non-public note** box.

14. Click **Next**, and follow the steps in "Establish chronology and enumeration" on page 38 and in "Set up the serial publication pattern regularity" on page 41.

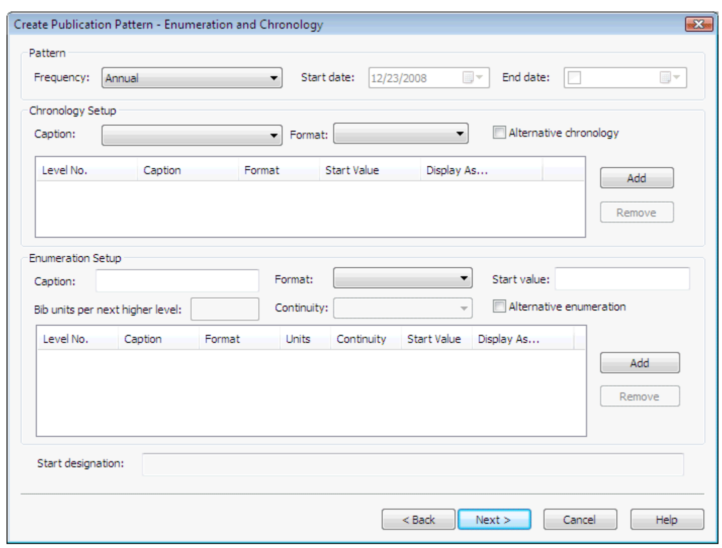
Establish chronology and enumeration

Follow these steps to establish a serial publication's chronology and enumeration.

Note:
You can specify up to four levels of chronology, six levels of enumeration, and two levels of alternative enumeration. There must be at least one level of enumeration or chronology.

1. Specify the publication pattern options, following the steps in "Specify the publication pattern for a serial title" on page 36, and click **Next**.

   The Create Publication Pattern - Enumeration and Chronology dialog box appears.

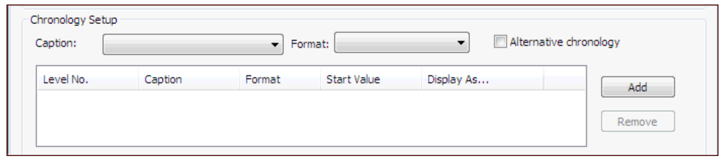


Tip:
If the frequency is Quarterly, see “Tips for Predicting Quarterly Issues” on page 44.

2. Select the frequency with which the serial is published in the **Frequency** box.

   Note:
   The frequency is specified in the 008 field, position 18 of the bibliographic record.

3. For each level of chronology, enter information in the following fields in the **Chronology Setup** frame:



   a) Select the chronology caption in the **Caption** box.

   b) Select the format in the **Format** box.

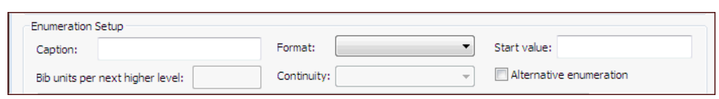
   c) If applicable, select the **Alternative chronology** box.

   d) Click **Add** to add the chronology level.

   e) Continue adding chronology levels.

   Example:
   If the chronology includes a year, month, and day (November 24, 2003), there are three levels of chronology. Select **Year** as the caption and select **Number** as the format for the first level of chronology. Select **Day of Month** as the caption and select **Number** as the format for the second level of chronology. Select **Month** as the caption and select **Full text** as the format for the third level of chronology.

4. For each level of enumeration, enter information in the following fields in the **Enumeration Setup** frame:



Tip:
To suppress the enumeration display, use square brackets **[ ]** in the **Caption** box. To force a value to display in reverse order, use a plus sign **+** in the **Caption** box under Enumeration Setup. For example: **+Ed.** with a format of **numeral**, and a start value of **5** would display as **5th Ed**.

   a) Type the enumeration caption in the **Caption** box.

   b) Select the enumeration format in the **Format** box.

   Note:
   If you select **Free text** for the enumeration format, you can leave the **Start value** blank. For more information on using free text enumeration to add an issue that is a supplement or a special issue with a different title than the title in the serial holdings record, see “Predict issues/parts with different titles” on page 51.

c) Type a start value for the enumeration in the **Start value** box.

Note:
If you select **Number**, **Numeral**, or **Roman** in the **Format** box, enter an Arabic number in the **Start value** box. The number is converted to the appropriate format. For example, if you selected **Numeral** for the format and **5** as the start value, it is converted to **5th**. If you selected **Roman** for the format and **5** as the start value, it is converted to **V**. The start value can be blank if the enumeration format is free-text.

d) If applicable, select the **Alternative enumeration** box.

e) Click **Add** to add the enumeration level.

Note:
If the enumeration for the serial has volume and number, the highest (first) level of enumeration is the volume.

The **Bib units per next higher level** and **Continuity** boxes appear for each level of enumeration you define after the first level of enumeration.

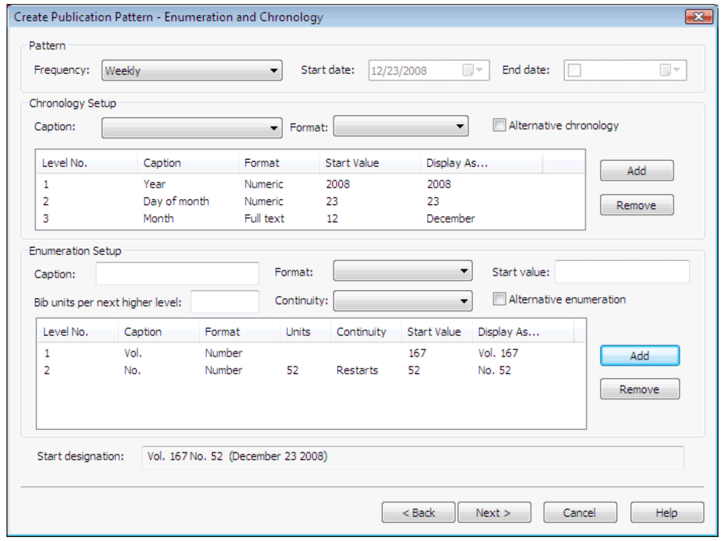
5. In the **Bib units per next higher level** box, indicate how many units are needed in each enumeration level (second - sixth) before the next higher level increments.

Examples:
For a monthly serial with enumeration of volume and issue, type **12** in the **Bib units per next higher level** box for the second enumeration level. After 12 issue records are created for a volume, the first enumeration level is automatically incremented by one.

For a daily publication that is published every day except on Sundays and Christmas Day, it is not necessary to enter the exact number of issues. Enter **365** in the **Bib units per next higher level** box. Then, select **Day of Month** in the **Calendar Change** box and a value of **0101** to force the volume to increment on January 1 of each year.

6. Indicate in the **Continuity** box if the numbering for each level restarts (returns to 1) or continues incrementing.

Note:
The enumeration and chronology levels and values you specified appear in the **Start designation** box. If the designation is not what you want, you can remove chronology and/or enumeration levels, and reenter the information.



7. Click **Next** to set up the serial regularity. See “Set up the serial publication pattern regularity” on page 41.

Set up the serial publication pattern regularity

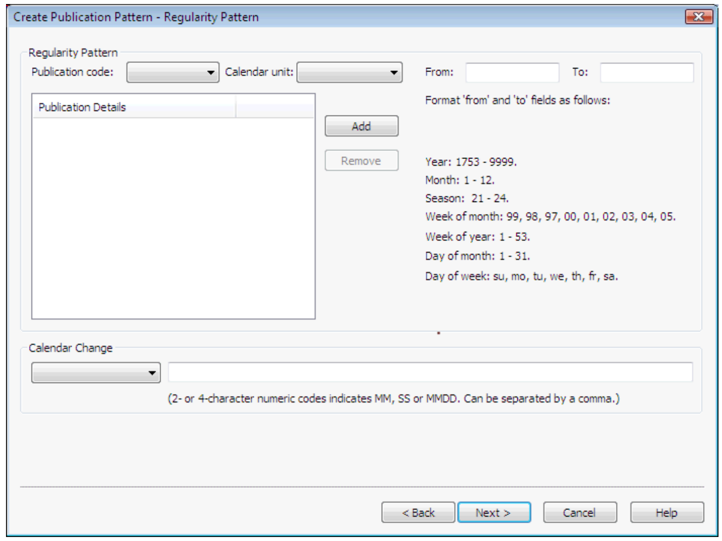
If the publication pattern frequency is a common one, and there are no combined or omitted issues, you do not need to specify the regularity to generate the predicted issues. For example, to predict issues for a serial with a **Daily** frequency that is published every day without exception, you do not need to enter the regularity information. If there are days when the serial is not published, you need to specify these exceptions. To predict issues for publications with a frequency of **Totally Irregular** or **Continuously Updated**, you must enter a regularity pattern.

Note:
Some frequencies show the publication details automatically in the **Publication Details** box, whereas other frequencies (such as Daily) produce too many entries to show in the box. To check the prediction, click **Next** (see “Review a publication pattern’s prediction” on page 45).

Follow these steps to specify the publication pattern regularity.

1. Specify the publication’s enumeration and chronology following the instructions in “Establish chronology and enumeration” on page 38, and click **Next**.

   The Create Publication Pattern - Regularity Pattern dialog box appears.



2. Select a publication code in the **Publication code** box.

   Note:
   There are default regularity patterns when you enter a frequency, but you can enter exceptions to the publication pattern by using **p** for additional issues, **o** for omitted issues, and **c** for combined issues.

3. Select a calendar unit in the **Calendar unit** box.

4. Type a valid publication value in the **From** box.

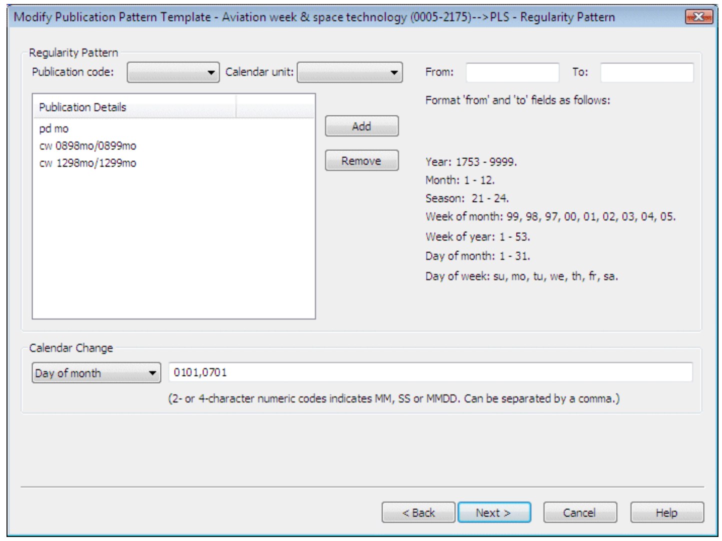
   Note:
   Day of week (d): mo, tu, we, th, fr, sa, su.
   Day of month (d): 01-31
   Month (m): 01-12
   Season (s): 21 (spring), 22 (summer), 23 (autumn), 24 (winter)
   Week of year (w): 01-53
   Week of month (w): 99 (last), 98 (next to last), 97 (third to last), 00 (every), 01 (first), 02 (second), 03 (third), 04 (fourth), 05 (fifth).
   Year (y): yyyy (four digits)

   If you are specifying that one or more issues are combined, you must enter both **From** and **To** values.

5. If applicable, type a valid publication value in the **To** box.

6. Click **Add** to add the publication details to the list under **Publication Details**.

   Example:
   A weekly serial is published on Monday of each week with combined issues for the last two weeks of August and December. The Publication Details are as follows for this publication:
   pd mo
   cw 0898mo/0899mo
   cw 1298mo/1299mo



Tip:
The **Calendar Change** box is active only if you defined enumeration in the publication pattern.

7. If you need to specify a calendar change, select **Month**, **Day of Month** or **Season** in the **Calendar Change** box, and enter the corresponding two-digit numeric code. If the serial is published less frequently than monthly, you must select **Day of Month** to indicate a calendar change.

   Note:
   A calendar change indicates the chronological point at which the highest level of enumeration increments or changes. For example, if you select **Day of Month** for the calendar change, and enter **0101**, the calendar change will be on January 1. However, if the serial is not published on January 1, the calendar change automatically takes effect on the next day the serial is published. You can specify more than one calendar change by separating the values with commas.

8. Click **Next**, and review the expected issues to see if the publication pattern results are what you wanted. See “Review a publication pattern’s prediction” on page 45.

   Note:
   If you go back to the previous view and change the frequency, the publication pattern details are automatically removed. However, changing other information does not affect the publication details.

Tips for Predicting Quarterly Issues

If the frequency is Quarterly, you can select a chronology caption of **Season** or **Quarter** (among other selections). The start date of the quarterly publication determines the chronology of the first issue.

If the chronology caption is set as Season, the Start date determines the season as follows:

- 3/21/YY - 6/20/YY = **Spring**
- 6/21/YY - 9/20/YY = **Summer**
- 9/21/YY - 12/20/YY = **Autumn**
- 12/21/YY - 3/20/YY = **Winter**

If the chronology caption is set as Quarter, the Start date determines the quarter as follows:

- 1/1/YY - 3/31/YY = **1st Quarter**
- 4/1/YY - 6/30/YY = **2nd Quarter**
- 7/1/YY - 9/30/YY = **3rd Quarter**
- 10/1/YY - 12/31/YY = **4th Quarter**

Depending on the initial start date, you can manipulate the chronology to correctly reflect the first issue to be predicted. The following are some examples of quarterly prediction:

- If the first issue is **Vol. 14 No. 3 (Autumn 2012)**, the Start date should be 9/21/12 or later (but not later than 12/20), so that the system will predict a fourth issue as **Winter 2012**.
- If the first issue is **Vol. 17 No. 1 (Winter 2012)**, the Start date should be 1/1/2012 or later, (but not later than 3/20/2012), so that the system will correctly predict all four issues within the calendar year, starting with Winter. If the start date is 12/21/11, a Winter issue will be produced, but with a chronology year of 2011, not 2012.

Related Information

"Publication Pattern Examples" on page 59

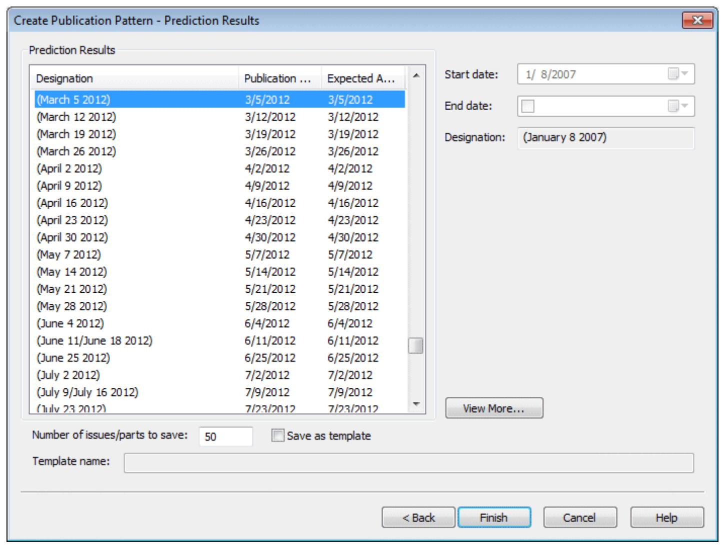
Review a publication pattern's prediction

Follow these steps to review the publication pattern's prediction results.

Tip:
The Prediction Results dialog box also displays when you select **Tools, Predict Issues/Parts** from the Check In workform and when you right-click from the Serial Holdings Record.

1. Set up the serial title's publication pattern. See "Specify the publication pattern for a serial title" on page 36.
2. After setting up the serial's publication regularity, click **Next**.

   The Create Publication Pattern - Prediction Results window displays the predicted issues using the pattern you set up. The pattern's start and end date display as well as the designation for the first predicted issue.



3. If you want to see more prediction results, click **View More**.

   Additional prediction results appear in the list.

Tip:
If you previously specified an end date, you can extend the publication pattern's end date to predict more issues. See "Specify the publication pattern for a serial title" on page 36.

4. If you want to save the publication pattern as a template, select the **Save as Template** check box, and type a name for the template in the **Template name** box.
5. Click **Finish** to save the publication pattern.

   If you saved the publication pattern as a template, it is available in the list in the Publication Pattern Template Manager. See"Creating Publication Pattern Templates" on page 53.

Changing a Publication Pattern

You can change the publication pattern for a serial holdings record if no issues or parts were received using that pattern. If one or more issues have already been received and the publisher changes the enumeration and/or chronology captions, or the arrival pattern (the publisher produces the serial monthly and then bimonthly), you can close the old pattern and create another one. If the publication pattern resumes, you can reopen the pattern. You can also add or remove predicted issues.

There are two ways you can change a publication pattern for a serial holdings record. One method is to change only the publication pattern options, such as the start or end date. For example, you want to keep the frequency, regularity, chronology, and enumeration that are defined in the pattern, but you want to change the start and end dates. The other method is to change the frequency, chronology, enumeration and other settings in the publication pattern but leave the start and end dates the same.

If the publication pattern is saved as a template, the changes are only made for that serial holdings record. To change a template, you must make the changes from the Publication Pattern Template Manager. See "Edit a publication pattern template" on page 56.

Modify publication pattern options

Follow these steps to modify publication pattern options for a serial holdings record.

Note:
Use this method if you want to modify the start or end date of the publication pattern, but leave the frequency, enumeration, chronology, and regularity the same.

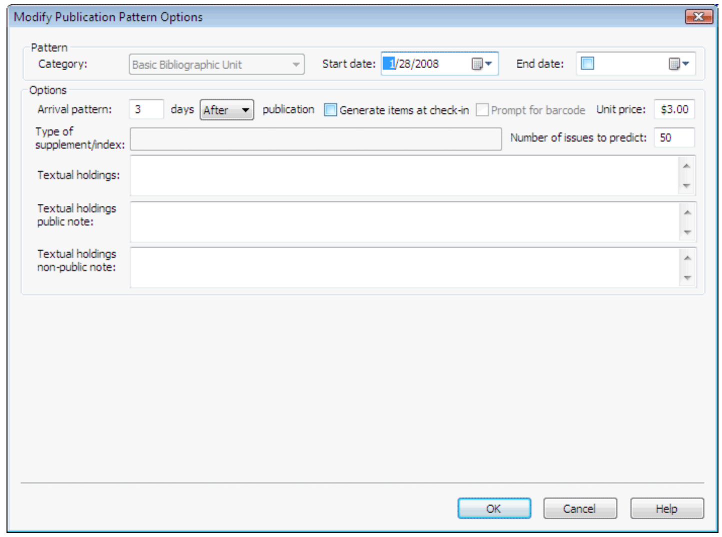
1. Open the Serial Holdings Record workform.
2. Right-click the publication pattern in the Publication Patterns list.

   The context menu appears.

Tip:
You can also select a publication pattern, and click .

3. Select **Edit pattern options** from the context menu.

   The Modify Publication Pattern Options dialog box appears.



4. Change the existing information or enter new information to modify the publication pattern options. See "Specify the publication pattern for a serial title" on page 36.
5. Click **OK** to save the changes to the publication pattern.

Modify a publication pattern

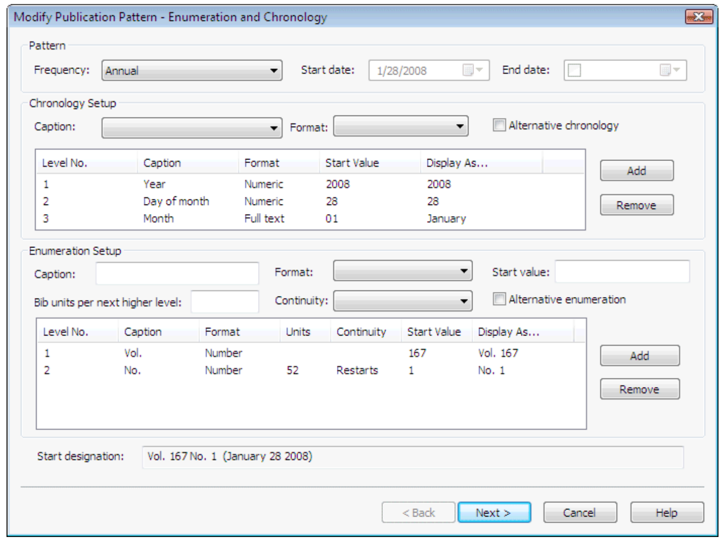
Follow these steps to modify a publication pattern for a serial holdings record.

Note:
Use this method if you want to modify the frequency, enumeration, chronology, or regularity of the publication pattern. You can modify a publication pattern if no issues have been received. If issues have already been received using this pattern, you must close the existing pattern and create a new pattern for the serial holdings record. See "Close a publication pattern" on page 49.

1. Open the Serial Holdings Record workform.
2. Right-click the publication pattern in the Publication Patterns list.

   The context menu appears.
3. Select **Open** from the context menu.

   The Modify Publication Pattern - Enumeration and Chronology dialog box appears.



4. If you want to change the existing information or enter new enumeration or chronology information, follow the steps in "Establish chronology and enumeration" on page 38.

5. If you want to modify the regularity, click **Next** on the Modify Publication Pattern - Enumeration and Chronology dialog box, and follow the steps in "Set up the serial publication pattern regularity" on page 41.

Related Information

"Edit a publication pattern template" on page 56

Close a publication pattern

Follow these steps to close a publication pattern.

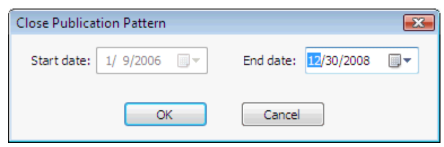
Important:
Be sure to predict all issues still under the old pattern before closing it and establishing a new publication pattern. Closing the pattern stops prediction even if the End date has not been reached. If you try to close a pattern, and issues have already been received, Polaris deletes only the expected, never published or not available issues with a start date after the End date entered in the Close publication pattern dialog box.

1. Right-click an open publication pattern on the Serial Holdings Record workform.

   The context menu appears.

2. Select **Close pattern** from the context menu.

   The Close Publication Pattern dialog box appears.



3. Enter the end date in the **End date** box, and click **OK**.

   The publication pattern is closed.

Related Information

Serial title changes - If the publication's title changed, copy the serial holdings record, link the new serial holdings record to the new bibliographic record, and close the publication pattern for the old serial holdings record. You can link to a different bibliographic record from a serial holdings record if no issues were received under that title. See "Link a new bibliographic record to a serial holdings record" on page 64.

Reopen a publication pattern

Follow these steps to reopen a closed publication pattern.

1. Right-click a closed pattern on the Serial Holdings Record.
2. Select **Reopen publication pattern** from the context menu.

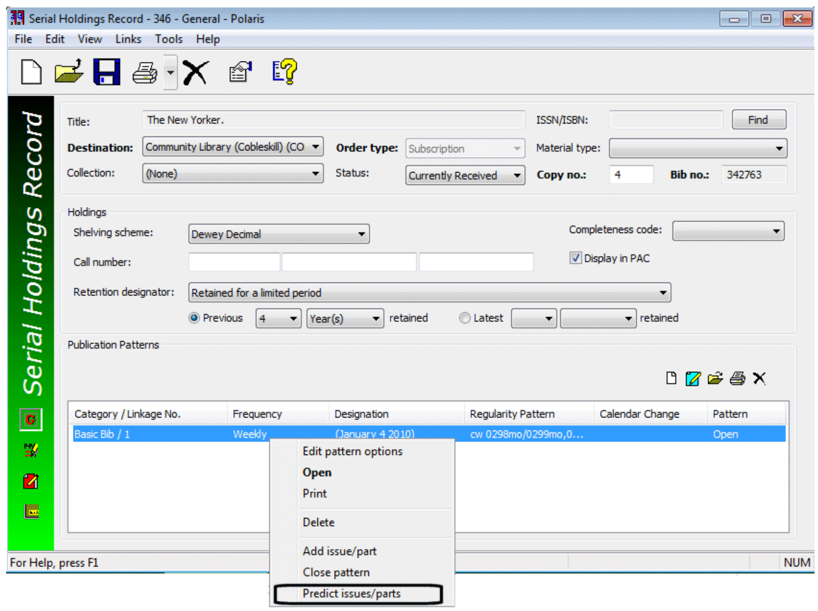
   The publication pattern is reopened.

Predict issues/parts from serial holdings

After you have set up a publication pattern and predicted issues or parts using this pattern, you can predict additional issues or parts.

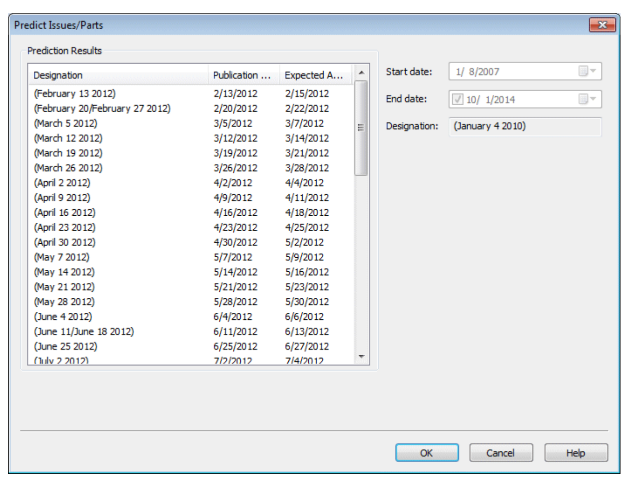
Follow these steps to predict issues or parts from the Serial Holdings Record workform.

1. Open the Serial Holdings Record workform.
2. Select the publication pattern, and right-click.



3. Select **Predict issues/parts** from the context menu.

   The Predict Issues/Parts dialog box shows the predicted issues.



4. Click **OK**.

   The predicted issues are created.

Predict issues/parts with different titles

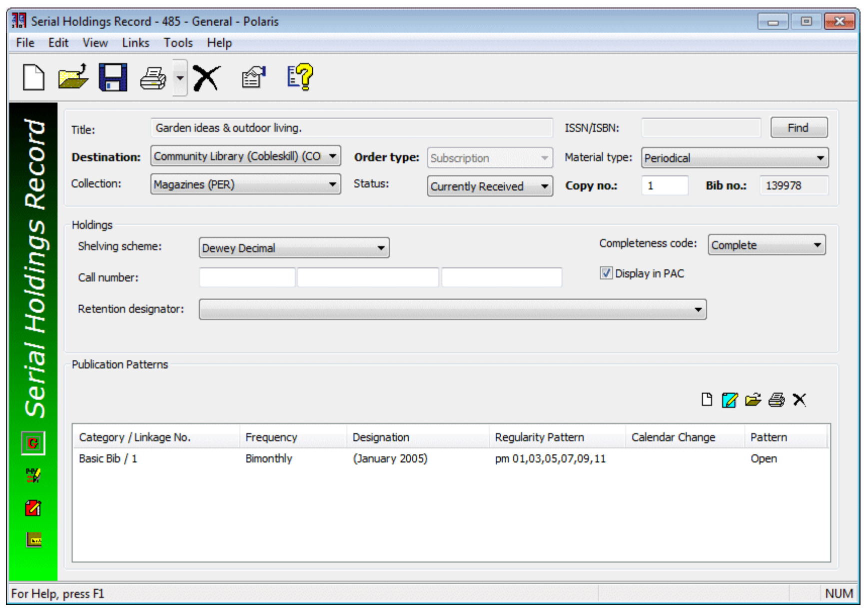
In some situations, a serial issue may be published outside of the usual publication pattern. It can be an issue that has the same title as the title in the serial holdings record, and the same enumeration and chronology, or it can be a special issue with a different title from the serial holdings record and no enumeration or chronology, such as *Special Fall Cleanup Issue*.

Note:
To add a special issue that is published outside of the usual publication pattern, but with the same title as the serial holdings record, see "Add a special issue/part at check in" on page 89.

Tip:
You can also create a publication pattern template with a frequency of **Completely irregular** or **Continuously updated** and an enumeration of **Free text** to use for these types of special issues or supplements. See "Creating Publication Pattern Templates" on page 53.

Follow these steps to add a special issue or part that has a different title than the title in the serial holdings record.

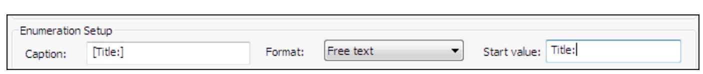
1. Open the Serial Holdings Record workform for the serial title.



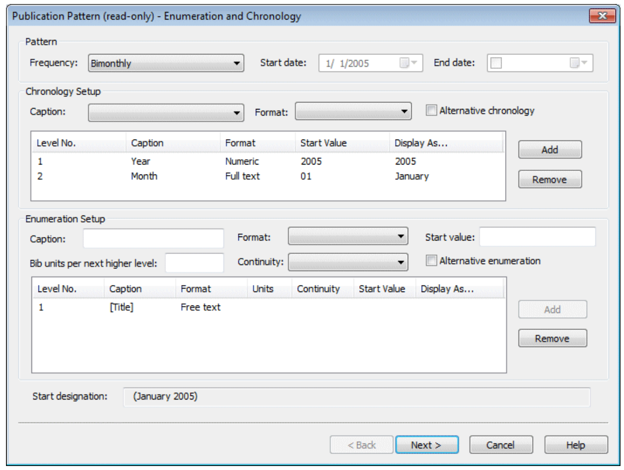
2. Double-click the pattern to open it.

3. Set up the chronology, if applicable, following the instructions in "Establish chronology and enumeration" on page 38.

4. In the **Caption** box under **Enumeration Setup**, type **[ ]** or **[Title]** as the holding place for the title of the special issue. The square brackets prevent the text from displaying. You can enter the exact title when the issue is checked in.

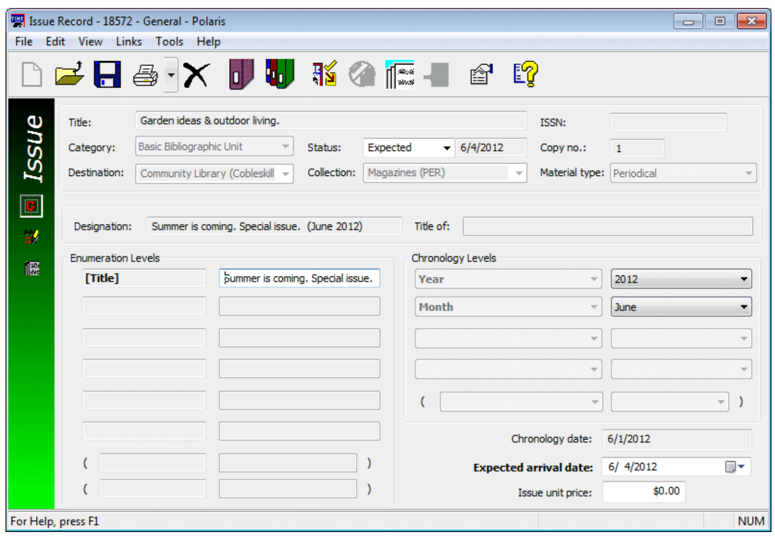


5. Select **Free text** in the **Format** box and click **Add**.



6. Select **Links, Check In** from the Serial Holdings Record workform.
7. When the special issue arrives, right-click the issue in the Check In workform, and select **Open** from the context menu.

   The issue appears in the Issue workform.
8. Type the title of the special issue in the box labeled **Title** under **Enumeration**.



9. Select **Tools, Check In** from the Issue menu to check in the issue.

   The issue's title displays in the PowerPAC's Availability view.

Creating Publication Pattern Templates

If your library has installed Polaris publication pattern templates, you can copy these templates for serial titles with similar publication patterns. The templates created by Polaris Library Systems have **PolarisExec** as the creator and **PLS** in the name.

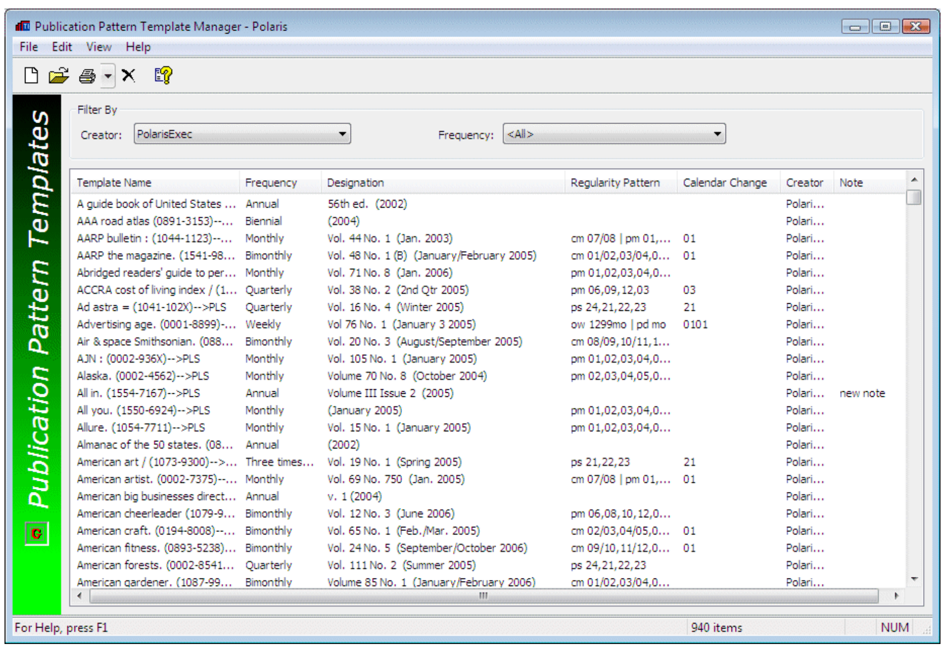
You can also create your own publication pattern templates from the Publication Pattern Template Manager or by saving a publication pattern as a template from the Serial Holdings Record workform. All publication pattern templates are available from the Serial Holdings Record.

Create a publication pattern template

Follow these steps to set up a serial publication pattern template.

1. Select **Serials, Templates, Publication Pattern** from the Shortcut Bar.

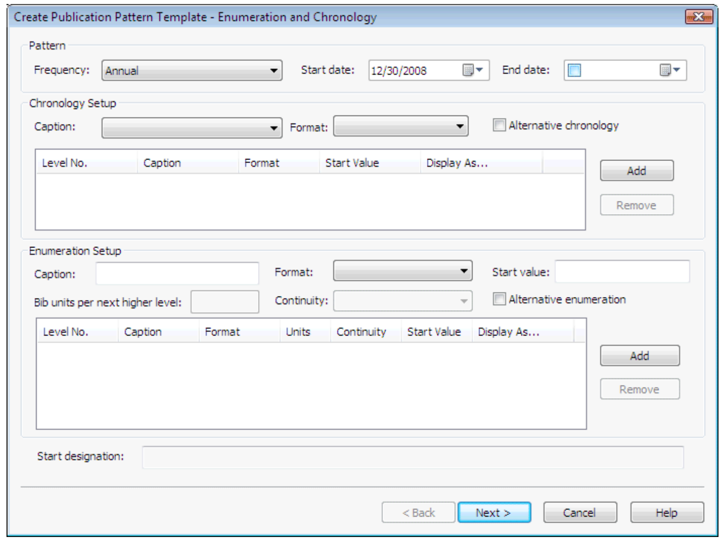
   The Publication Pattern Template Manager workform appears.



Tips:
Expand the Publication Pattern Manager by dragging the bottom right corner of the workform.
Widen a column by dragging the border of the column header.
Filter the list by selecting a creator or frequency.
Sort the list by clicking the column header.
Quickly locate a template by placing the cursor in the list and typing the first letter of the template name.

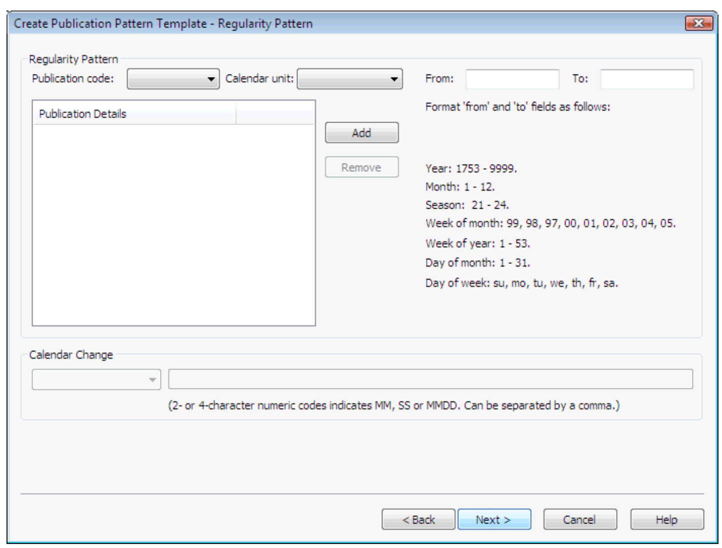
2. Select **File, New,** or click .

   The Create Publication Pattern Template - Enumeration and Chronology dialog box appears.



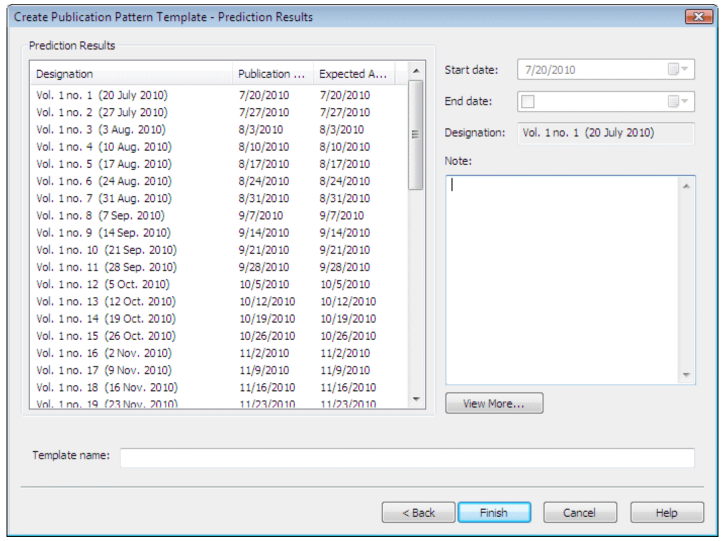
3. Define the publication pattern enumeration and chronology, and click **Next**. See “Establish chronology and enumeration” on page 38.

   The Create Publication Pattern Template - Regularity Pattern dialog box appears.



4. Specify the publication regularity, and click **Next**. See “Set up the serial publication pattern regularity” on page 41.

   The Create Publication Pattern Template - Prediction Results dialog box appears.



5. Review the predicted issues to make sure the results are what you expected. See “Review a publication pattern’s prediction” on page 45.

   Note:
   If the results are not what you expected, click **Back** to go back and change the prediction pattern.

6. If you want a note to appear next to this template in the Publication Pattern Template Manager list, type up to 512 characters in the **Note** box.

7. Type a name for the template in the **Template name** box.

8. Click **Finish**.

   The publication pattern template is saved and will appear in the list of templates when you create a new pattern in a serial holdings record.

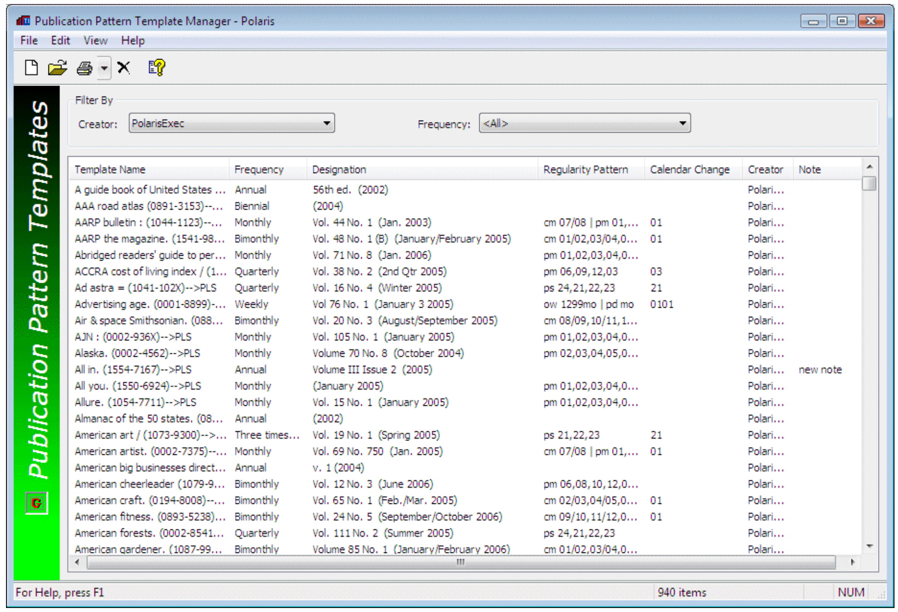
Edit a publication pattern template

Follow these steps to edit a publication pattern template.

Tips:
Expand the Publication Pattern Template Manager by dragging the bottom right corner of the workform.
Widen a column by dragging the border of the column header.
Filter the list by selecting a creator or frequency.
Sort the list by clicking the column header.
Quickly locate a template by placing the cursor in the list and typing the first letter of the template name.

1. Select **Serials, Templates, Publication Patterns** from the Polaris Shortcut Bar.

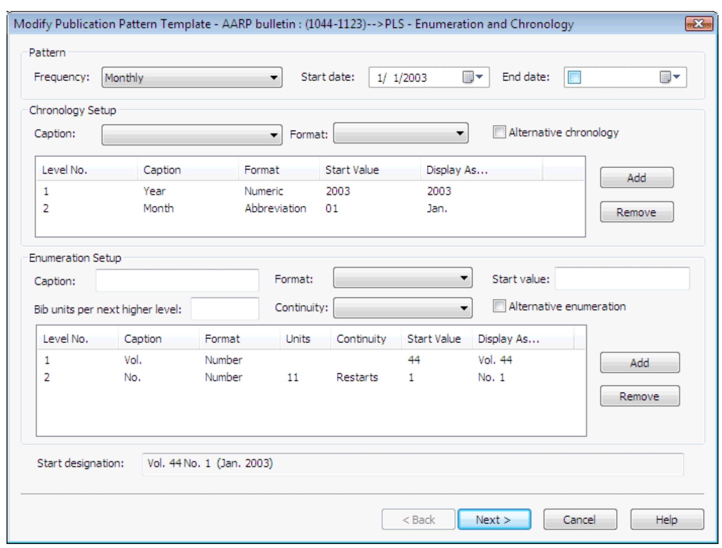
   The Publication Pattern Template Manager workform appears.



Tip:
To delete or print multiple publication patterns, multi-select the patterns, right-click, and then select **Print** or **Delete** from the context menu. Other options are available on the menu when you select a single template.

2. Right-click a publication pattern, and select **Open** from the context menu.

   The Modify Publication Pattern dialog box appears.



3. Modify the publication pattern as needed. See "Creating Publication Pattern Templates" on page 53.

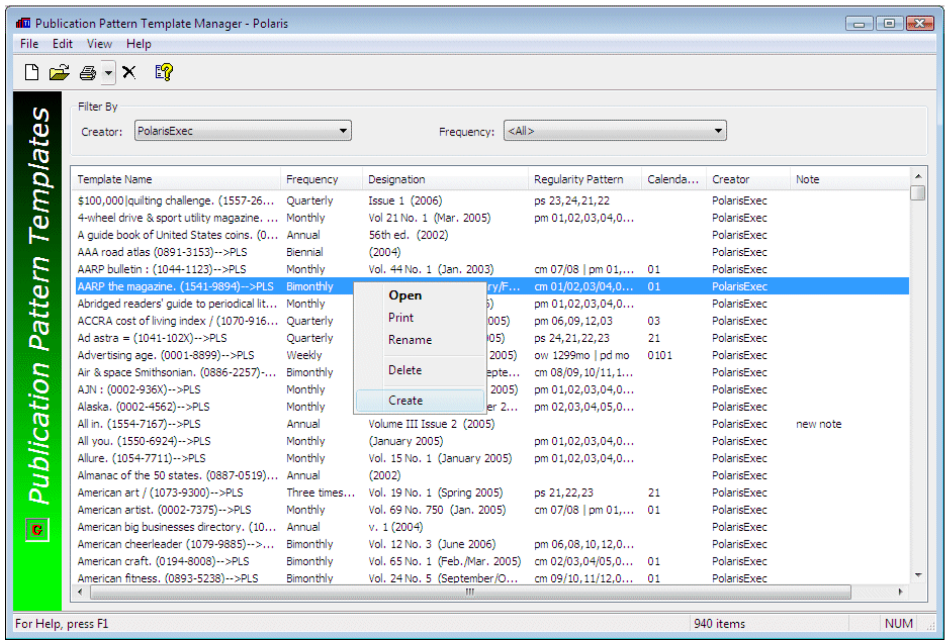
Copy a publication pattern template

If you want to start with an existing publication pattern template, modify it, and create a new template, you can copy the template. Follow these steps to copy a publication pattern template.

1. Select **Serials, Templates, Publication Patterns** from the Polaris Shortcut Bar.

   The Publication Pattern Template Manager workform appears.

2. Right-click a publication pattern template, and select **Create** from the context menu.



The Create Publication Pattern dialog box appears.

3. Modify the publication pattern as needed. See "Creating Publication Pattern Templates" on page 53.

4. Type a name for the new template in the **Template name** box on Step 3 of the Create Publication Pattern window, and click **Finish**.

   The publication template is saved with the new name.

Rename a publication pattern template

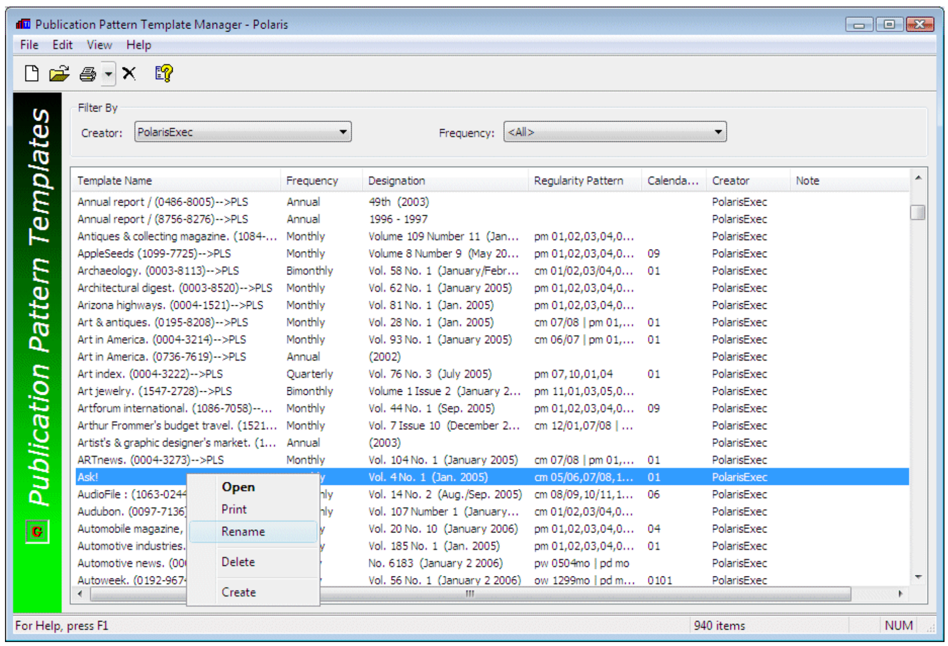
If you want to keep all the settings for a publication pattern template, but you want to give it another name, you can rename the publication pattern template. Follow these steps to rename a publication pattern template.

1. Select **Serials, Templates, Publication Patterns** from the Polaris Shortcut Bar.

   The Publication Pattern Template Manager workform appears.

2. Right-click the publication pattern you want to rename, and select **Rename** from the context menu.

   The name area is highlighted in the list.



3. Type the new name over the existing name.

   The publication pattern template's name is changed.

Publication Pattern Examples

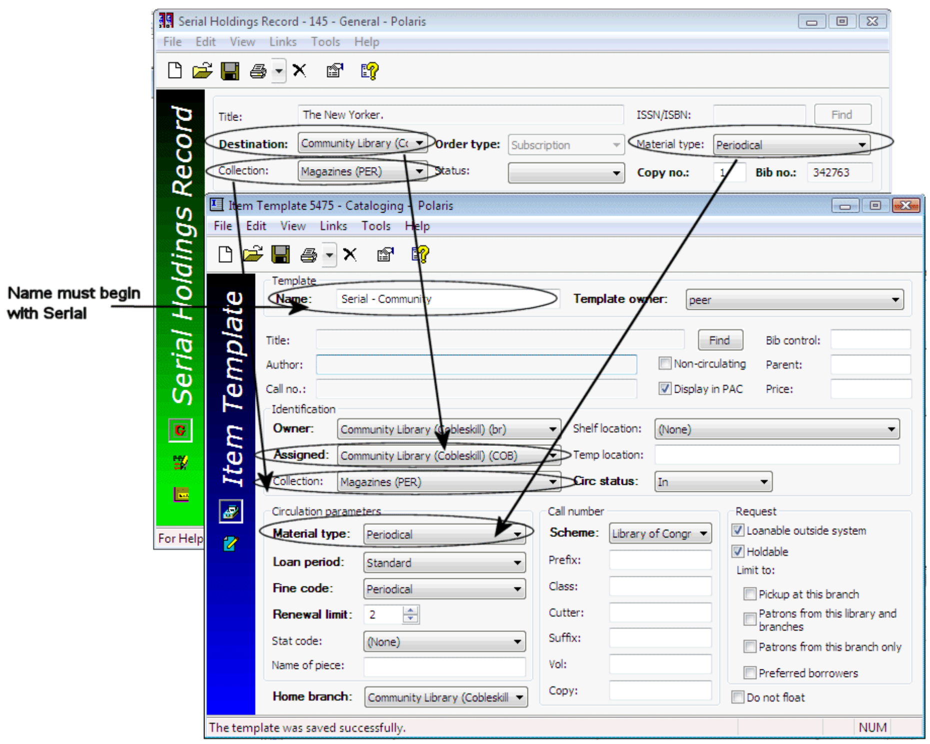
Publication Example	Frequency	Chronology	Enumeration	Regularity/ Exception For exceptions, use publication codes: p (published) o (omitted) c (combined)	Pattern Results
Published annually	Annual	*Year*	*Vol.*		*Vol. 1 2011* *Vol. 2 2012*
Published monthly with two combined issues - July/ Aug. & Sept./ Oct.	Monthly	*Year* *Month*	*Volume 1* *Issue 1*	*cm07/08* *cm09/10*	*Vol. 1 Issue 1 January 2012 (10 issues per year - July & Aug. in issue 7, Sept. & Oct. in issue 8)*
Published semiweekly - Monday and Thursday (except on Fourth of July, Labor Day, Thanksgiving, Christmas, New Year's Day)	Semiweekly	*Year* *Day of month* *Month* *Day of week*	*Vol. 1* *no. 1* *Monday* *Jan. 2*	*od0101* *od0704* *od1225* *ow0901mo* *ow1199th*	*Vol. 1 no. 1 Monday, January 6, 2012 (omits Jan.1, July 4, Dec. 25, 1st Mon. in Sept. & last Thurs. in Nov.)*

Creating Serial Item Templates

If your library circulates serials or tracks their use in-house, use a serial item template to generate serial items at check-in. You can create serial item templates for every branch, serials collection, and serials material type so that there is minimal processing required after the item record is created.

To create a serials item using an item template, there must be an item template with a name that begins with **Serial** or **Serials**, and the following fields in the Serial Holdings Record workform and the Item Template workform must match:

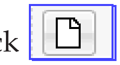
- **Destination** on the Serial Holdings Record workform and **Assigned** on the Item Template workform
- **Collection** on the Serial Holdings Record workform and **Collection** on the Item Template workform
- **Material type** on the Serial Holdings Record workform and **Material type** on the Item Template workform



1-2-3

Create a serial item template

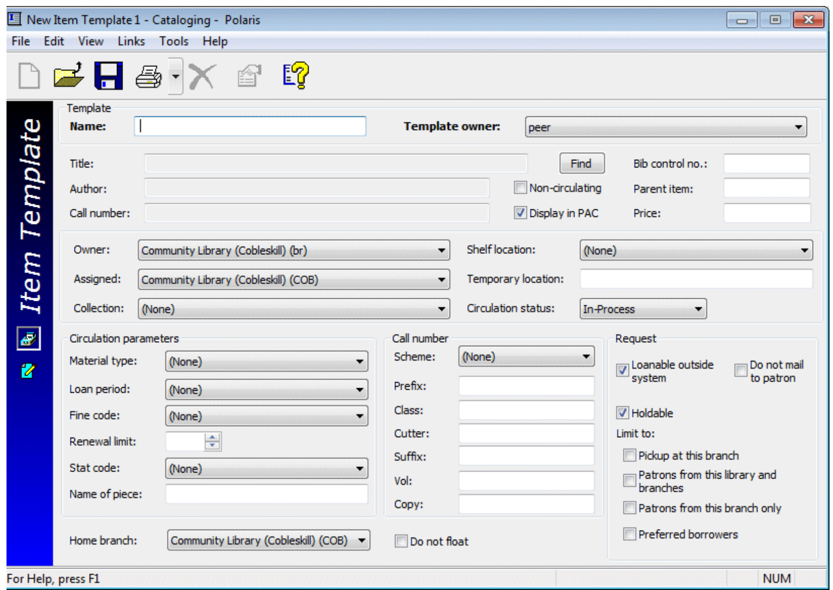
Follow these steps to create a serial item template.

1. Select **File, New** from the Polaris Shortcut Bar, or click .

   The New dialog box appears.

2. Select **Item Template** in the Objects list, and click **OK**.

   The Item Template workform appears.



3. Type **Serial** or **Serials** followed by a template name in the **Name** box.
4. Select the template owner in the **Template Owner** box.
5. Select the owner for the item records in the **Owner** box.

   Note:
   Select the same branch name in the **Owner** box as that in the **Assigned branch** box.

6. Select the branch name in the **Assigned** box.
7. Select the material type in the **Material type** box.
8. Select the collection in the **Collection** box.
9. Select the following required fields to create an item record: **Loan period**, **Fine code**, and **Renewal limit**.

   Note:
   See “Using Cataloging Templates” in the *Polaris Cataloging Guide 4.1R2*.

10. Complete the information for circulating serials according to your library’s policies and workflow.

Tip:
You can set the **Circ status** in the template to **In** if you want all your serial items created from this template to have a circulation status of **In**.

11. Select **File, Save**.

Note:
If the template does not have the required information for creating an item record, a message appears and you cannot save the template. Fill in the required fields labeled in bold type, and save the template again.

The template is saved. When you check in serial issues and the serial holdings record has the same destination (assigned branch), collection, and material type as the item template, serial items are create automatically.

Related Information

Checking in serial issues and creating item records - See "Checking In Serials" on page 76.

Changing a Serial Holdings Record's Title

If you have saved a serial holdings record with the wrong title, you can link it to a new bibliographic record. However, any received and retained issues/parts and any linked serial item records will be linked to the new bibliographic record, and they will display in the PAC with the new title.

In cases where the publisher changes the title of the serial publication, and your library uses successive entry cataloging, it is preferable to create a new serial holdings record and link it to the bibliographic record with the publication's new title. Close the publication pattern for the old serial holdings record, which deletes any issues that have been predicted but not received. Then, select **File, New, Copy** to create a new serial holdings record with the same publication pattern as the old title, and then link to the new bibliographic record.

If the publication pattern has not changed with the new title, you can then generate issues from the existing pattern, and check in issues for the new title. This method ensures that any retained issues and items from the old serial holdings record keep the link to the old bibliographic record and display in the PAC under the old title. Any subsequent retained issues and items will display in the PAC under the new title.

In Polaris Administration, the title display for serials can be configured to display the 780 (Former Title) and 785 (Later Title) fields in the PAC. When the title display has been configured to display the former and later title, patrons can find all the issues of a serial. See "Configuring the PowerPAC Title Display" in the *Polaris Public Access Administration Guide 4.1R2* and "Configuring the Mobile PAC Title Display" in the *Polaris Public Access Administration Guide 4.1R2*

Note:
When you select a different bibliographic record to be linked to the serial holdings record, the compressed holdings statement in the PAC will not reflect the change until the BuildUpCompressedHoldings SQL job has been run.

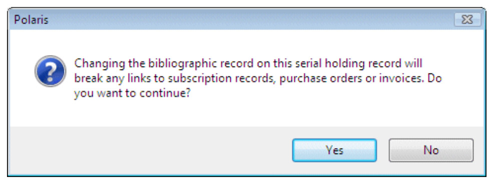
Link a new bibliographic record to a serial holdings record

Follow these steps to change a serial holdings record's title.

Important:
You should change the bibliographic record only when you have linked to the wrong record. If there are received issues/parts and item records linked to the serial holdings record, they will all be linked to the new title. If the publication's title changed, copy the serial holdings record, link the new serial holdings record to the new bibliographic record, and close the publication pattern for the old serial holdings record. See "Close a publication pattern" on page 49.

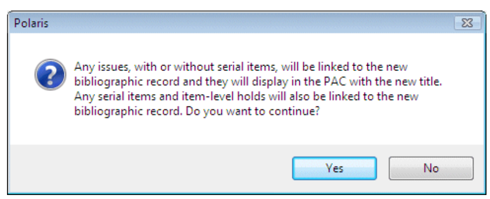
1. Open the Serial Holdings Record workform.
2. Click **Find** to search for the new bibliographic record.

   If the serial holdings record is linked to a subscription record, purchase order line item, or invoice line item, a message appears.



3. Click **Yes** to continue.

   If there are links to received and retained issues/parts, and any item records, a message appears.



4. Click **Yes** to continue.

   The Find Tool appears with **Bibliographic Records** selected in the **Object** box.
5. Search for the bibliographic record with the new title.

   The bibliographic record or records matching your search criteria appear in the Find Tool results list.
6. Select the new bibliographic record.

   Polaris checks for any received issues and any linked items.
7. Save the serial holdings record.

   The Serial Holdings Record is updated with the new title information.

Publisher Changes a Serials Title

If the publisher changes the title of a serial publication for which the library already has received and retained issues/parts, create a new serial holdings record, and close the publication pattern for the old serial holdings record. This ensures that any issues/parts received under the old title display the old title, and new issues/parts display the new title.

- See "Copy a serial holdings record" on page 31.
- See "Close a publication pattern" on page 49.

You can set Polaris Administration profiles to display the former and later titles in the PAC.

- See "Configuring the PowerPAC Title Display" in the *Polaris Public Access Administration Guide 4.1R2* and "Configuring the Mobile PAC Title Display" in the *Polaris Public Access Administration Guide 4.1R2*.

Managing Subscriptions

Subscription Records are optional in Polaris. You can use subscription records if your library wants to track renewals or create purchase orders automatically when subscriptions are renewed. You can renew and cancel subscriptions without creating subscription records, but there will be no automatic tracking or reporting capabilities.

A subscription record is a central location for information related to one or more copies (serial holdings records) of a subscription, including the renewal term, status, start date, and expiration date. A subscription record is linked to a bibliographic record and one or more serial holdings records. Once you have set up subscription records for all the subscriptions your library has, you can manage (view, renew, cancel) your subscriptions from the Subscriptions List.

If you use subscription records, you can print reports that show the types of serials titles your library subscribes to and the cost of these subscriptions. These reports can assist you in making decisions about renewing or cancelling your library's subscriptions. For more information, see "Serials Reports" in the *Polaris Basics Guide 4.1R2*.

This unit covers the following topics:

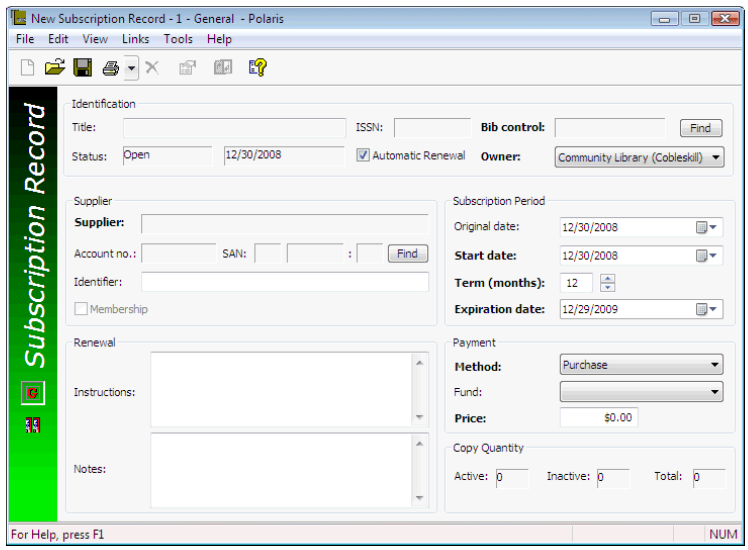
Create a subscription record

Follow these steps to create a subscription record.

1. Select **File**, **New** from the Polaris Shortcut Bar.
2. Select **Subscription Record** from the list.

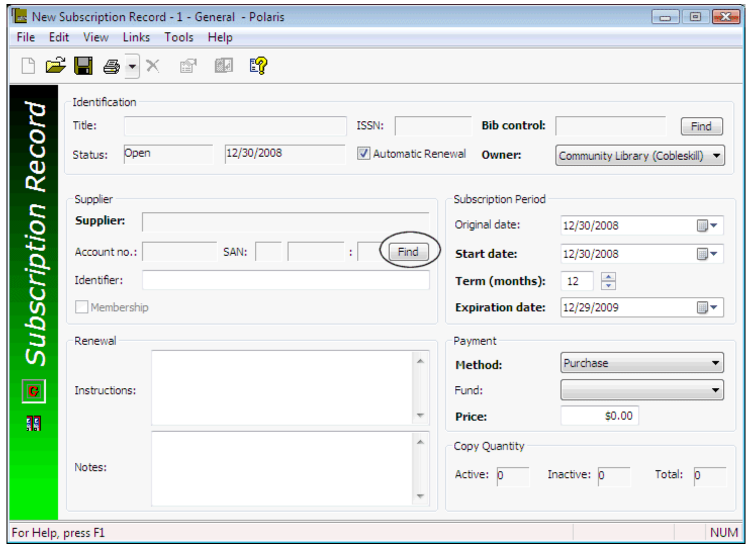
   A blank Subscription Record workform appears.

3. Click **Find** next to the **Bib control** box, and use the Find Tool to select the bibliographic record for the subscription title.



The bibliographic information for the subscription title appears in the **Bib control**, **Title** and **ISSN** boxes.

4. Select the library that controls this subscription in the **Owner** box.
5. Clear the **Automatic Renewal** check box if you do not want the subscription to be renewed automatically.
6. Click **Find** next to the **Supplier SAN** box, and use the Find Tool to search for and select the supplier for this subscription.



The supplier name, account number, and SAN appear in the appropriate boxes.

7. Type a name by which your library identifies this supplier, if applicable.
8. Select the date when the subscription originally began in the **Original date** box.
9. Select the date when the present subscription period began in the **Start date** box.
10. Select the term for the subscription in the **Term** box.

    The expiration date automatically appears in the **Expiration date** box.

    Important:
    The payment method, fund, and subscription price are required if you choose to create purchase orders automatically upon renewal.

11. Select the payment method for the subscription in the **Method** box.
12. Select the fund that is being used for the subscription in the **Fund** box.
13. Type the price of the subscription in the **Price** box.

    Note:
    The Copy Quantity information appears when there are serial holdings records associated with this subscription record.

14. If applicable, type renewal instructions and notes in the **Instructions and Notes** boxes.
15. Add serial holdings records to the record (see "Add a serial holdings record to a subscription record" on page 69).

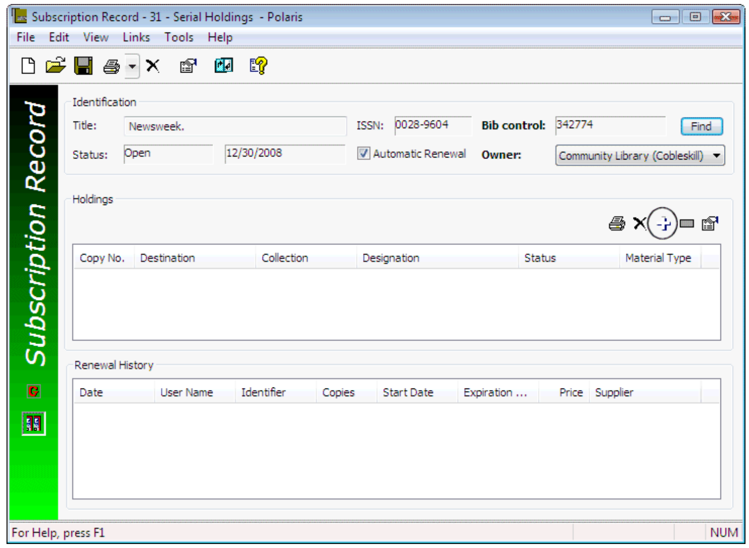
Add a serial holdings record to a subscription record

After you have created a subscription record, you can add serial holdings records to the subscription record. Follow these steps to add a serial holdings record to a subscription record.

Tip:
You can also add a serial holdings record to the subscription record by selecting **Tools, Add to Subscription Record** from the Serial Holdings Record workform. Then, select the subscription record from the Find Tool.

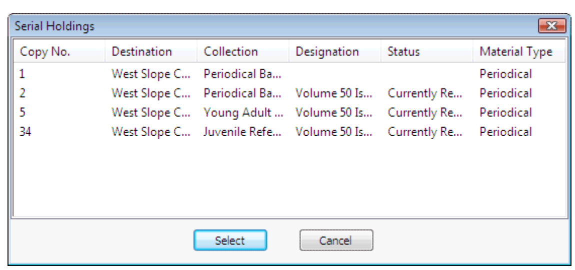
1. Select **View, Serial Holdings** on the Subscription Record workform.

   The Serial Holdings view appears.



2. Click to add a serial holdings record.

   If only one serial holdings record is linked to the bibliographic record, the information from that serial holdings record appears in the Subscription Record workform. If multiple serial holdings records are linked to the bibliographic record, the serial holdings records are listed in a dialog box.



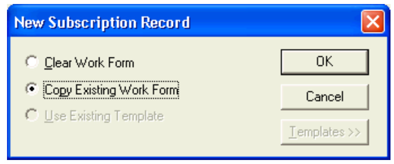
3. If the Serial Holdings dialog box appears, select the serial holdings record that you want to add to the subscription record, and click **Select**.

   The serial holdings record appears in the Holdings list.

Copy a subscription record

You can create a new subscription record by copying an existing subscription record. Follow these steps to copy a subscription record.

1. Display the subscription record in the Subscription workform.
2. Select **File, New** from the menu on the Subscription workform.
3. The New Subscription Record dialog box appears.



4. Choose one of the following options:
   - Select **Copy Existing Workform** if you want to copy the subscription information to the new subscription record.
   - Select **Clear Workform** if you want to create a new record with different subscription information.

   Note:
   Any serial holdings records that are linked to the original subscription record are not linked to the new record.

5. Continue entering the subscription information. See "Create a subscription record" on page 67.

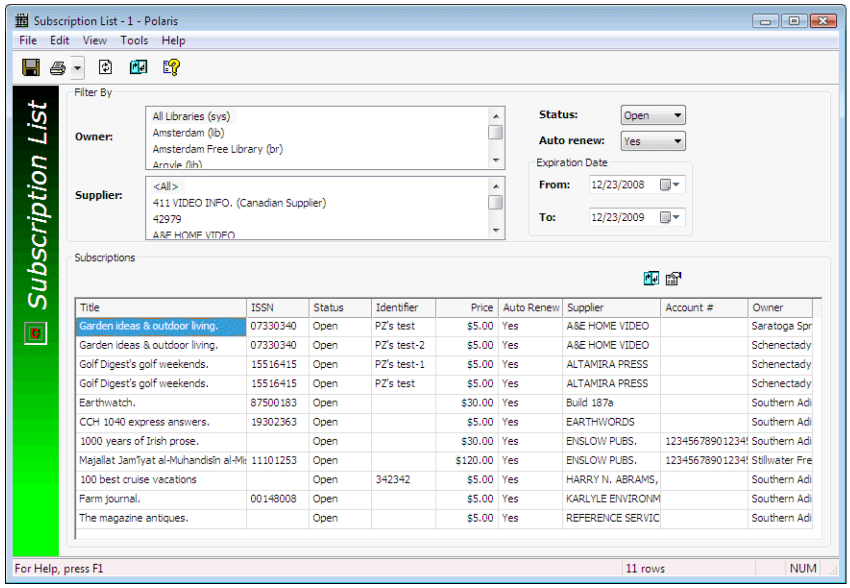
View the Subscription List

The Subscription List displays the library's subscription records. You can filter the list to see the subscriptions for a specific supplier, owner, status, expiration date range, and automatic renewal flag. Follow these steps to filter the subscription list to show specific subscriptions.

Tips:
Sort a column by clicking on the column header.
Expand a column by dragging the border of a column header.
Expand the workform by dragging the lower right corner .

1. Select **Serials, Subscription List**.

   The Subscription List appears.



2. Filter the list using the following options:

   - Select one or multiple libraries in the **Owner** box. To include all the branches, select the system level.
   - Select one or multiple suppliers in the **Supplier** box, or select **All** to view the subscriptions for all suppliers.
   - Select a status in the **Status** box, or select **All** to view the subscriptions without regard to status.
   - Select an option in the **Auto renew** box, or select **All** to view the subscriptions whether they are automatically renewed or not.
   - Select an expiration date range in the **From** and **To** boxes. To include all expiration dates, expand the date range.

Tip:
When one type of filter is selected, all the filters' settings are used to limit the list. If you do not want the **Supplier**, **Status**, or **Auto renew** filters to be used, select the **All** option for any of these filters. If you do not want the **Expiration Date** to be used, expand the date range to encompass all possible expiration dates. If you do not want the **Owner** to be used, select the name of the library system (**sys** appears after the system name).

Related Information

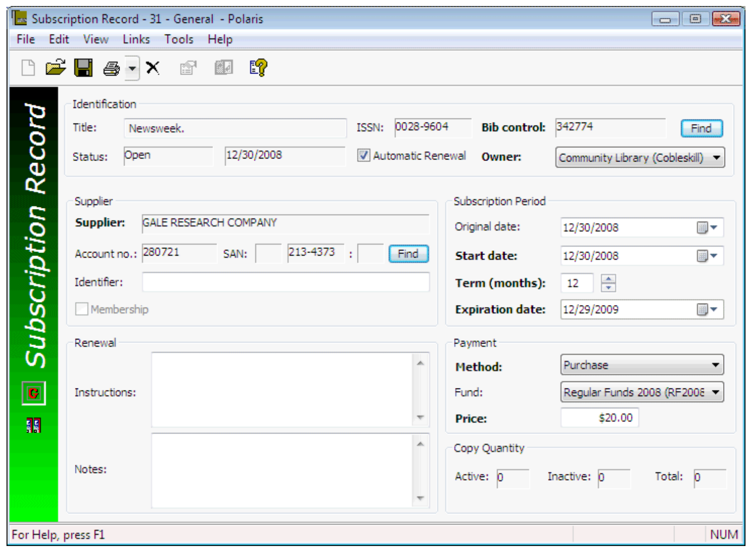
- "Renew subscriptions from Subscription List" on page 73
- "Cancel a subscription" on page 74

Renew a subscription from the subscription record

The subscription renewal process can automatically create purchase orders if your organization has set this option in Polaris Administration. Follow these steps to renew a subscription from the Subscription Record workform.

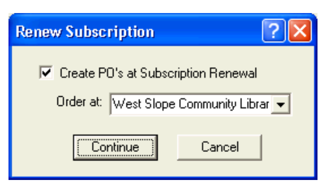
Note:
If you are not using subscription records, you can simply extend the subscription end date by typing a new date in the **End date** box in the publication pattern in the Serial Holdings Record, generate more issues, and receive them. See "Specify the publication pattern for a serial title" on page 36. You can use an invoice with one line item to indicate the expenditure for the renewal. See "Create an invoice without a purchase order" in the *Polaris Acquisitions Guide 4.1R2*.

1. Display the subscription in the Subscription Record workform.



2. Select **Tools, Renew** from the Subscription Record menu.

   The Renew Subscriptions dialog box appears.



Tip:
You can clear the check box to renew the subscription without creating a purchase order.

The **Create POs at Subscription Renewal** box is checked if the parameter **Create Purchase Order at subscription renewal** is set to **Yes** in Polaris Administration (see "Set up subscriptions" on page 126). The **Order at** library is set to the default library.

3. Click **Continue** to renew the subscription.

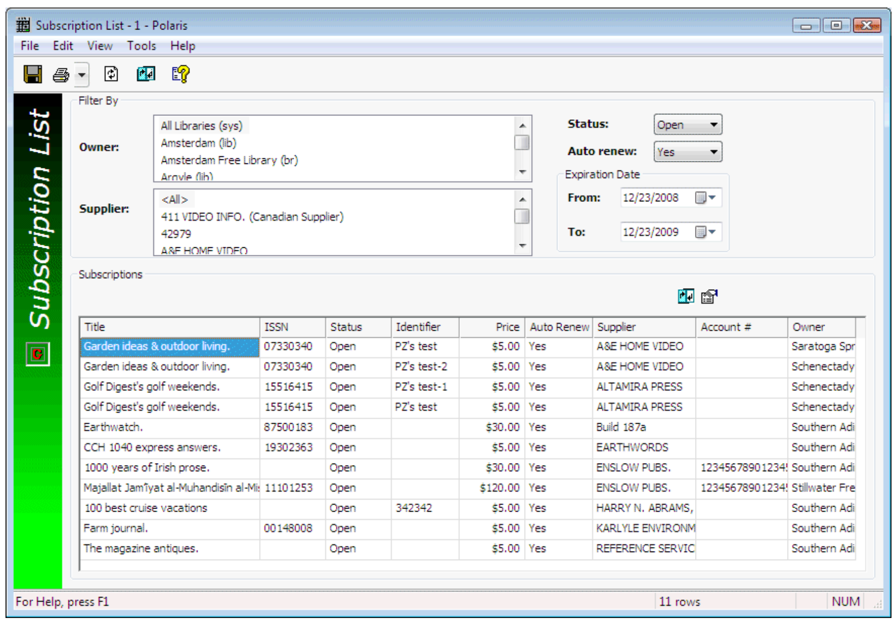
   The subscription is renewed. If your library chooses to create purchase orders upon renewal, a new purchase order is created with one line item per subscription record. The line item contains a segment for each unique combination of destination and collection from the subscription record's linked serial holdings records. If a purchase order was previously linked to this subscription record, the previous purchase order is closed.

Renew subscriptions from Subscription List

Follow these steps to renew subscriptions from the Subscription List.

1. Select **Serials, Subscription List** from the Polaris Shortcut Bar.

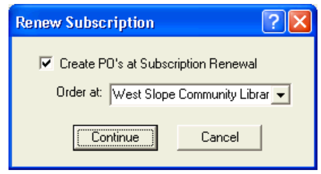
   The Subscriptions List appears.



2. Set the view of the Subscription List to display the subscriptions you want to renew. See "View the Subscription List" on page 71.

3. Choose one of the following options:
   - To renew one or multiple subscriptions, select the subscriptions in the list, right-click, and select **Renew** from the context menu.
   - To renew all the subscriptions in the list, display the subscriptions that you want to renew using the filters, and select **Tools, Renew All** from the Subscription List menu.

   The Renew Subscriptions dialog box appears.



The **Create POs at Subscription Renewal** box is checked if the parameter **Create Purchase Order at subscription renewal** is set to **Yes** in Polaris Administration (see "Set up subscriptions" on page 126). The **Order at** library is set to the default library.

> **Note:**
> You can clear the check box to renew the subscriptions without creating a purchase order.

4. Click **Continue** to renew the subscriptions.

   The subscriptions are renewed, and the purchase orders are created, if you selected this option.

Cancel a subscription

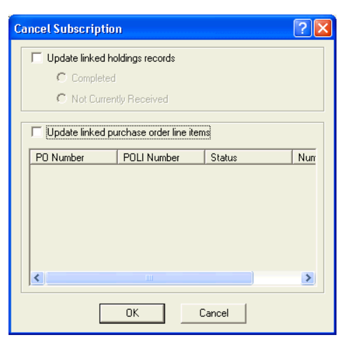
Follow these steps to cancel a subscription.

1. Display the subscription that you want to cancel in the Subscription Record workform or the Subscription List workform.

   > **Note:**
   > For information on using filters to view subscriptions on the Subscription List workform, see "View the Subscription List" on page 71.

2. Do one of the following actions:
   - If you are canceling the subscription from the Subscription List workform, right-click the subscription you want to cancel, and select **Cancel** from the context menu.
   - If you are canceling the subscription from the Subscription Record workform, select **Tools, Cancel**.

   The Cancel Subscription dialog box appears.



3. Select **Update linked serial holding records**, and select **Completed** or **Not Currently Received** if you want to update the linked serial holdings records to one of these statuses.

4. Select **Update linked purchase order line items** if there are purchase order line items linked to this subscription, and you want their statuses changed to Closed.

5. Click **OK**.

   The Print dialog box appears.

6. Click **OK** to print the cancellation notice to send to the supplier.

   When you cancel a subscription, the subscription status changes to cancelled, and you can change any linked serial holdings records' statuses to completed or not currently received, and any linked purchase order line items to cancelled. If there are funds encumbered on the linked purchase order line item, the funds are disencumbered.

Related Information

- **Printing cancellation notices in batch** - Select **Batch Print, Cancellation Notices** from the Serials menu.
- **Cancellation notice information** - The subscription cancellation notice text is set in the Polaris Administration Serials parameter **Notification: Subscription Cancellation Notice Text.** It includes the date of the cancellation notice; the subscription title, ISSN, and subscription identifier; the supplier's name, address, phone number, and account number; the name, address, and phone number of the subscription's owner.

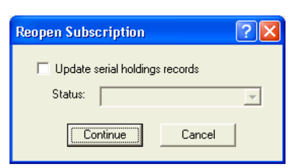
Reopen a subscription

Follow these steps to reopen a cancelled subscription.

1. Open the canceled subscription in the Subscription Record workform.

2. Select **Tools, Reopen**.

   The Reopen Subscription dialog box appears.



3. To update the subscription holdings records, click **Update serial holdings records**, and select the status in the **Status** box.

4. Click **Continue** to reopen the subscription.

Tip:
You can also reopen a canceled subscription from the Find Tool results list or from the Subscription List. Right-click the subscription, and select **Reopen** from the context menu.

Checking In Serials

When you receive serial issues or standing order parts from the supplier, you check in the issue or part. You can check in any issue or part that has a status of Expected, Pending Claim, or Claimed.

If you set up a publication pattern in the Serial Holdings Record for the title, and you choose to generate issues or parts, they display in the Serial Check In workform. You can predict more expected issues or parts under this publication pattern from the Check In workform, and you can add issues or parts that arrive unexpectedly. When you check in a standing order part, you can either link to an existing bibliographic record or, if no title exists in the database, you can manually create a new bibliographic record.

You can check in serial issues and standing order parts from the Issue or Standing Order Part workform, the Check In workform, the Polaris Find Tool, and any linked list box that displays the issues or parts. Multiple issues can be checked in at once from the Find Tool or Check In workform.

If the **Generate Item Records at Check In** and the **Prompt for barcode at Check In** boxes are checked in the publication pattern, the barcode prompt appears, and you can scan in a barcode. The prompt may also include a box for the serial issue's price, if the **Enter unit price at serials check-in** parameter is set to **Yes** in Polaris Administration. The **Generate Item Records at Check In** may also be enabled without the **Prompt for barcode at Check In**. If this is done, an issue's linked item will be automatically generated behind the scenes.

Note:
During Serials check-in, if the System Administration Permission **Override invalid item barcode message: Allow** is enabled in Cataloging, an alert appears if an invalid item (format) barcode is scanned.

This unit covers the following topics:

Check in issues/parts from the Check In workform

Follow these steps to check in serial issues or standing order parts from the Subscription or Standing Order Check In workform.

Note:
You can specify the default display of issues or parts in the Check In workform using the Polaris Administration Acquisitions/Serials parameter **Display of Issues on Check In**. See "Setting the Check In Display" on page 122.

1. Select **Serials, Check In** from the Polaris Shortcut Bar.

   The Find Tool appears with **Check In Records** selected in the **Object** box.

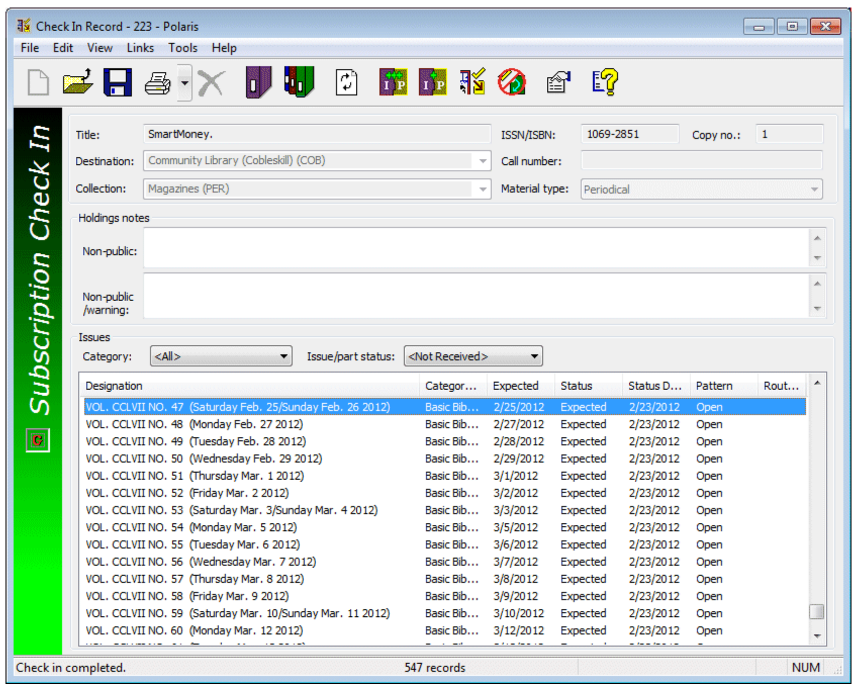
2. Use the Find Tool to search for the serial title.

   A list of the standing orders or subscriptions appears in the results list.

3. Double-click the standing order or subscription check in record.

   The Subscription Check In or Standing Order Check In workform appears.

Tip:
To expand the window, click and drag the lower right corner.



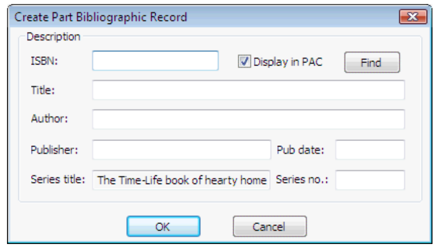
Tip:
If you want to enter notes for staff regarding the serial title, such as change in the publication pattern, type in the **Non-public** or **Non-public/warning notes** fields. Use the scroll buttons to scroll through the notes. The notes are also updated in the Serial Holdings Record, but they do not display in the PAC. These notes are read-only if you do not have the permission Modify Serial Holdings Record.

4. Select one standing order part, or select one or more serial issues from the list.

   Note:
   You cannot check in multiple standing order parts at once.

5. Right-click and select **Check In** from the context menu.

   If you are checking in a standing order part, the Create Part Bibliographic Record dialog box appears. This dialog box does not appear when you check in a serial issue.



6. If you checked in a standing order part, complete the Create Part Bibliographic Record dialog box as follows:

Tip:
Do not use articles before title names, such as “The” or “A”. For *The Big Apple*, enter: **Big Apple**. The linked MARC record automatically assigns to the Title information (245) the indicators **10** (one-zero).

a) Link to an existing bibliographic record by clicking **FIND** to search for and select an existing record, or enter the bibliographic record information in the fields (the minimum required is **Title**) to create a new bibliographic record.

b) Click **OK**.

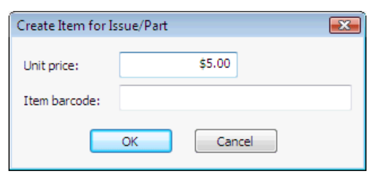
Note:
If you do not want this bibliographic record to display in the PAC, clear the **Display in PAC** check box.

The bibliographic record is created and saved in the database with a status of Final.

Tip:
The **Unit price** field is read-only if the Polaris Administration Acquisitions/Serials parameter **Enter unit price at serials check-in** is set to **No**. The price will appear if it was set in the publication pattern, but it will be read-only. The cursor will go to the Item barcode field on the Create Item for Issue/Part dialog box you can scan the barcode. See “Set the prompt for price at check-in” on page 124.

7. If the Create Item for Issue/Part dialog box appears, enter a unit price (if necessary), type or scan the barcode number, and click **OK**.

Note:
If the **Generate Item Records at Check In** box has been checked in the publication pattern, but not the **Prompt for barcode at Check In**, the Create Item for Issue/Part dialog box does not display, but an item is generated.



The issue or part is received, and the following status changes occur:

- The issue’s or part’s status is changed to Received.
- The status of both the serial holdings record and the linked purchase order line item (if one exists) changes to Currently Received.

Related Information

- **Uncheck in -** If you checked in an issue in error, you can undo the check in. See "Uncheck in issues or standing order parts" **on page 93**.
- **Printing serial labels** - If the Polaris Administration Staff Client profile **Labels: Automatically generate labels for each SO and SUBS check-in** is set to **Yes**, labels are generated automatically when issues or parts are checked in. See "Print a label for a serial issue or part" on page 85.
- **Routing issues** - If you are checking in a serial issue that is on a route list, a message asks if you want to print a route slip. See "Print a route slip" on page 111.
- **Turning price prompt on or off at check in** - See "Set the prompt for price at check-in" on page 124.

Check in from the Issue/Standing Order Part

Follow these steps to check in from the Issue or Standing Order Part.

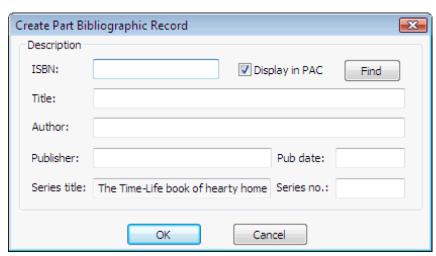
1. Use the Find Tool to search for and select the standing order part or serial issue you want to check in.

   The Standing Order Part or Issue workform appears.

2. Select **Tools, Check In** from the menu.

   If you are checking in a serial issue, the check in is complete. However, you can create an item record for the serial issue if you circulate issues or track their in-house use statistics.

   If you are checking in a standing order part, the Create Part Bibliographic Record dialog box appears.



3. If you checked in a standing order part, complete the Create Part Bibliographic Record dialog box as follows:

   a) Link to an existing bibliographic record by clicking **Find** to search for and select an existing record, or enter the bibliographic record information in the fields (the minimum required is **Title**) to create a new bibliographic record.

Tip:
Do not use articles before title names, such as "The" or "A". For *The Big Apple*, enter: **Big Apple**. The linked MARC record automatically assigns to the Title information (245) the indicators **10** (one-zero).

b) Click **OK**.

Note:
If you do not want this bibliographic record to display in the PAC, clear the **Display in PAC** check box.

The bibliographic record is created and saved in the database with a status of Final.

Tip:
The **Unit price** field is read-only if the Polaris Administration Acquisitions/Serials parameter **Enter unit price at serials check-in** is set to **No**. The price will appear if it was set in the publication pattern, but it will be read-only. The cursor will go to the Item barcode field on the Create Item for Issue/Part dialog box you can scan the barcode. See “Set the prompt for price at check-in” on page 124.

4. If the Enter Barcode dialog box appears, type or scan the barcode number, and click **OK**.

Note:
If the **Generate Item Records at Check In** box has been checked in the publication pattern, but not the **Prompt for barcode at Check In**, the Enter Barcode dialog box does not display. An item is generated at issue check-in.

The issue or part is received, and the following status changes occur:

- The issue’s or part’s status is changed to Received.
- The status of both the serial holdings record and the linked purchase order line item (if one exists) change to Currently Received.

Related Information

- **Printing serial labels** - If the Polaris Administration Staff Client profile **Labels: Automatically generate labels for each SO and SUBS check-in** is set to **Yes**, labels are generated automatically when issues or parts are checked in. See “Print a label for a serial issue or part” on page 85.
- **Routing issues** - If you are checking in a serial issue that is on a route list, a message asks if you want to print a route slip. See “Print a route slip” on page 111.
- **Uncheck in -** If you checked in an issue in error, you can undo the check in. See “Uncheck in issues or standing order parts” **on page 93**.

Check in single or multiple issues from the Find Tool

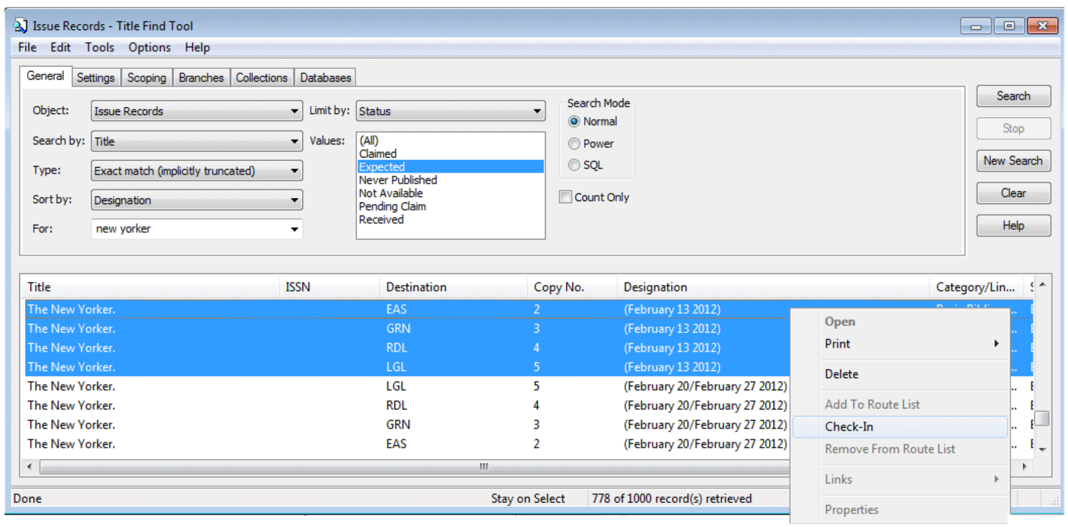
Checking in multiple issues from the Find Tool is useful if you are doing centralized check in. Sorting by the issue's designation (enumeration and chronology) lets you quickly identify the correct issue and check in multiple copies of the issue for various locations. Follow these steps to check in issues from the Find Tool.

Tip:
You cannot check in standing order parts from the Find Tool.

1. In the Polaris Find Tool, select **Issue records** in the **Object** box, select **Title** in the **Search by** box, select **Exact match (implicitly truncated)** in the **Type** box, and select **Designation** in the **Sort by** box.

2. Press **Enter** or click Search.

   The issues appear in the Find Tool results list sorted by designation.



Tip:
If the publication has a SICI barcode, you can scan it to locate the issue.

3. Select the issue or issues you want to check in, right-click, and select **Check-In** from the context menu.

   Note:
   If the serial holdings record is set to create item records and prompt for barcodes, a message box appears, and you can enter the barcode. **If you are checking in multiple serial issues, the check in process pauses when a message box appears, and the issue is highlighted in the list. When you respond to the message, the check in process continues where it left off.**

4. If the Enter Barcode dialog box appears, type or scan the barcode number, and click **OK**.

   The issue or issues are checked in.

Check in issues from a linked list box

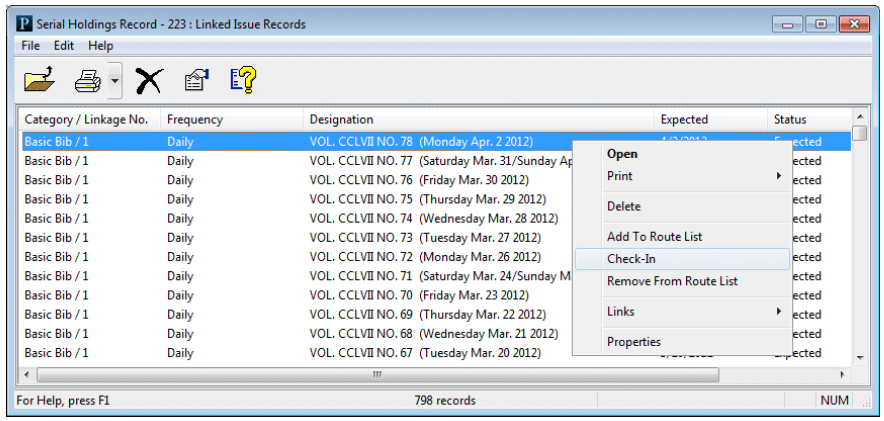
Follow these steps to check in a single or multiple issues from a linked list box that displays issues.

1. Display the linked list box with the issues listed.

Tip:
To sort the issues, click a column heading.

Example:
You could search for a serial holdings record in the Polaris Find Tool. Then, select the serial holdings record in the Find Tool results list, right-click, and select **Links, Issues/Parts**. If there are issues linked to the serial holdings record, they display in the linked list box.

2. Select the issue or issues you want to check in, right-click and select **Check In** from the context menu.



Note:
If the serial holdings record is set to create item records and prompt for a barcode, a message box appears, and you can enter the barcode. If you are checking in multiple serial issues, the check in process pauses when a message box appears, and the issue is highlighted in the list. When you respond to the message, the check in process continues where it left off.

3. If the Enter Barcode dialog box appears, type or scan the barcode number, and click **OK**.

   The issues are checked in and their statuses change to Received.

Related Information

If a message tells you that the item barcode is invalid, you can continue saving the serial item if you have the cataloging permission **Override invalid item barcode message: Allow.**

Add a serial item from the Issue/Part workform

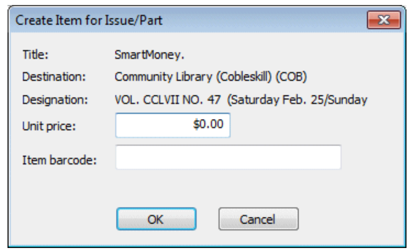
Tip:
For information on creating item records at check in, see "Check in issues/parts from the Check In workform" on page 78.

If you did not generate item records automatically at check in, you can add them from the Issue or Part workform.

Follow these steps to create an item record from the Issue or Part workform.

1. From the Issue or Part workform, select **Tools, Create Item**.

   The Create Item for Issue/Part dialog box appears.



2. Type the unit price.
3. Type the barcode.
4. Click **OK**.

   If the barcode is not recognized as a valid barcode for an item record, a message appears and you can continue creating the item record if you have the Cataloging permission **Override invalid item barcode message: Allow**.

   If the barcode is valid, the message **Linked item record was generated successfully** appears in the status bar.

Print a label for a serial issue or part

A serial label placed on the outside of serial material assists in shelving and provides abbreviated information about the issue or part. You can print labels on sheets or on a continuous feed roll. For information on setting up serial labels, see “Setting Up Labels” on page 262. If you want to change the default label type or print options, select **Serials, Options** from the Polaris Shortcut Bar. See “Change serial label defaults” on page 86.

Follow these steps to print a label for a serial issue or standing order part.

1. Access one of the following workforms:
   - Subscription Check In
   - Standing Order Check In
   - Serial Issue
   - Standing Order Part

   Note:
   The dialog box for printing labels may automatically appear when you check in a serial issue or part.

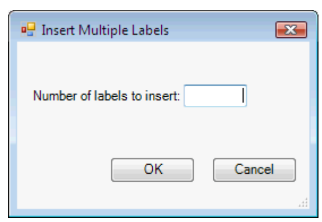
2. If you are printing labels from the Subscription or Standing Order Check In workform, select the issue or part for which you want to print labels.

Tip:

Click or press **Ctrl+Alt+L** to print a single label, or click or press **Ctrl+Alt+M** to print multiple labels.

3. Select **File, Label Request** and select one of the following options:
   - **Single Label**
   - **Multi-Label**

   If you selected **Multi-Label**, the Insert Multiple Label dialog box appears.



4. If you are printing multiple labels, type the number of labels you want to print in the **Number of labels to insert** box, and click **OK**.

   Note:
   If you selected **Single Label**, no dialog box appears, and the single label is printed.

   The message **Labels requested** appears in the status bar, and the labels are printed.

Related Information

“Setting Up Labels” in the *Polaris Cataloging Guide 4.1R2*

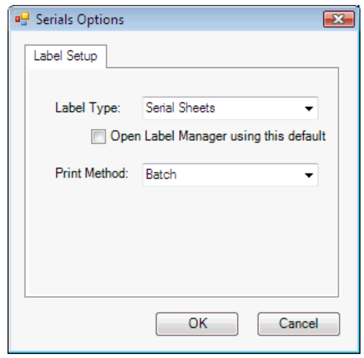
Change serial label defaults

The defaults for serial labels are set up using profiles in Polaris Administration. However, you can change these defaults from the Serials menu using the Serials Options dialog box. Once you have made changes using this dialog box, the defaults are set for your login.

Follow these steps to change the serial label defaults.

1. Select **Serials, Options** from the Polaris Shortcut Bar.

   The Serials Options dialog box appears.



2. Select the type of label to use for serials labels in the **Label Type** box.

   If you want Label Manager to open with serial labels, select **Open Label Manager using this default**.
3. Select the method for printing serials labels in the **Print Method** box.
4. Click **OK**.

   The serials labels defaults are updated for your user login.

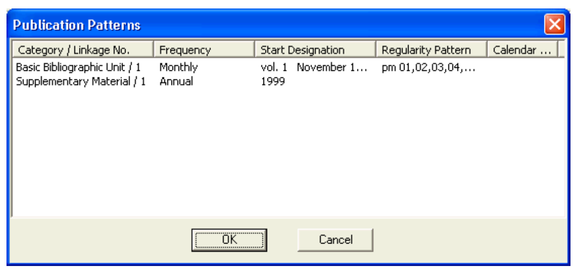
Add irregular serial issues/parts at check-in

The arrival of most serial issues or parts can be predicted using the publication pattern in the serial holdings record. However, some serial issues or parts cannot be predicted because their publication pattern is too irregular or complex to accurately predict an expected arrival date. For the irregular serials, you can manually add issue/part records in advance of the expected arrival of the physical piece.

Follow these steps to add a subscription issue or standing order part for an irregular publication pattern.

1. Display the Subscription Check In workform or the Standing Order Check In workform for the serial to which you want to add an issue or part.
2. Select **Tools, Add Issue/Part**.

   If there is more than one publication pattern associated with this serial title, a dialog box lists the publication patterns.



3. If the Publication Patterns dialog box appears, select the publication pattern for the serial issue or standing order part, and click **OK**.
4. If you are adding a standing order part, and you know the bibliographic information, select **Tools, Add Bibliographic Record,** and enter the information in the Create Part Bibliographic Record dialog box.
5. Click **OK**.
6. Select **File, Save**.

   The Serial Issue or Standing Order Part workform appears.
7. Enter the enumeration of the new issue in the value column of the Enumeration levels boxes in the Issue/Part workform.

Tip:
You can wait until you check in the part to create the bibliographic record. The Create Part Bibliographic Record dialog box appears automatically when you check in the part. See “Check in issues/parts from the Check In workform” on page 78.

8. Enter the chronology of the new issue in the value column of the Chronology levels boxes.

   The **Chronology date** displays the selected chronology levels.

   Note:
   The read-only **Chronology date** in the Issue or Part workform is the internal chronology date Polaris uses for displaying the issue or part in the correct order in the PAC. The chronology date always displays as MM/DD/YYYY format, whether or not all three levels of chronology are defined in the publication pattern. The chronology date uses the year selected in the first level of chronology if it is selected, or the current year if the year is not selected. If the month and day are not defined, the chronology date uses the month and day from the publication pattern's start date.

9. If needed, change the date in the **Expected arrival date** box.

Tip:
Public notes display in the PAC. For example: **This issue does not circulate.**

10. Select **View, Notes** to display the Notes view.
11. Type notes in the **Public, Non-public**, or **Non-public/warning** boxes that relate to this specific issue.
12. Select **File, Save**.

    The new issue record is added to the Serial Check In issues or parts list with a status of Expected.

13. If the record was added because the issue has arrived, check in the issue by selecting **Tools, Check-In** before closing the Serial Issue workform.

Add a special issue/part at check in

You may receive a special issue or part of a serials title that has the same name as the serials title but is published outside of the usual publication pattern. In this case, you can add the issue or part at check in. Follow these steps to add a special issue or part.

> **Note:**
> Serial issues display in the PAC according to the retention information in the serial holdings record and the most-recently checked in issue, including special issues. For example, if the serial holdings record specifies that issues will be retained for one year, and the special issue is checked in a year after all the other issues were checked in, only the special issue will be displayed in the PAC. The retention information can be changed in the linked serial holdings record. See “Displaying Serial Titles in the PAC” on page 19.

Tip:
For special issues that follow the publication pattern, but have a different title than the title in the serial holdings record, see “Predict issues/parts with different titles” on page 51.

1. Right-click a pattern on the Serial Holdings Record workform.

   The context menu appears.

2. Select **Add issue/part** from the context menu.

   The new issue or part displays in the Issue or Part workform. It contains the captions and category from the linked pattern, a status of Expected, and information from the Serial Holdings Record.

3. Type a value for each level of enumeration and chronology.

   > **Note:**
   > The read-only **Chronology date** in the Issue or Part workform is the internal chronology date Polaris uses for displaying the issue or part in the correct order in the PAC. The chronology date always displays as MM/DD/YYYY format, whether or not all three levels of chronology are defined in the publication pattern. The chronology date uses the year selected in the first level of chronology if it is selected, or the current year if the year is not selected. If the month and day are not defined, the chronology date uses the month and day from the publication pattern's start date.

4. Type or select an expected arrival date in the **Expected arrival date** box.
5. Select **File, Save** to save the issue.
6. Check in the issue, following the steps in “Checking In Serials” on page 76.

   > **Note:**
   > If the second level of enumeration in the publication pattern indicates the enumeration restarts after a certain number of issues, you will get a warning message if the issue you are adding exceeds that number. For example, the publication pattern is for a quarterly and the second level of enumeration indicates the numbering restarts after 4 issues. You receive an extra issue that you want to be issue number 5. You can save this issue, but you will receive a warning message that says: “This issue's enumeration contains a value greater than 4. Do you want to continue saving this issue?”

Delete single or multiple serial issues/parts

If you have the required Serials permissions, you can delete serial issues and standing order parts that are no longer retained by your library, regardless of their status. When you delete a received serial issue or standing order part that is linked to an item record, the linked item record is automatically deleted if you also have the Acquisitions permission **Allow Create and delete item records from acquisitions and serials** and the item can be deleted. See "Setting Delete of Issue/Part with Item" on page 125 for more information on the permissions required for managing serial issues and parts.

Tip:
You can also delete serial issues or parts automatically when a serials item is deleted in Cataloging. If the Polaris Administration Acquisitions/Serials parameter **Delete linked serial issue/part when serial item is deleted** is set to **Yes**, the issue or part is automatically deleted whenever a serial item is deleted. See "Delete bibliographic or item records" in the *Polaris Cataloging Guide 4.1R2*.

Follow these steps to delete a subscription issue or standing order part, regardless of its status. You can delete a single or multiple issues or parts at once from the Check In workform, the Find Tool results list or from linked list boxes that display the issues or parts. You can delete a single issue or part from the Issue or Part workform.

1. Do one of the following actions:
   - From the Issue or Standing Order Part workform, select **File**, **Delete** click , or press **CTRL+D**.
   - From the Find Tool results list, select the issues or parts, right-click and select **Delete**.
   - From a linked list box that displays issues or parts, select the issues or parts, right-click and select **Delete**.
   - From the Subscription or Standing Order Check In workform, select the issues or parts, right-click, and select **Delete**.

   A message asks you to confirm the deletion.

2. Click **Yes** to continue deleting the issues or parts.

   Note:
   If you are deleting multiple issues at once, the applicable messages appear for each of the issues to be deleted. The process pauses until you respond to the message, and the issue or part is highlighted where the process stopped. See "Possible Messages When Deleting Issues or Parts" on page 91

   The issues or parts are deleted and any linked item records are also deleted, unless there are conditions that prevent their deletion. The items may be marked for deletion but retained in the database if your library retains deleted items until a purge process is run. See "Managing Record Deletion" in the *Polaris Cataloging Guide 4.1R2*.

Possible Messages When Deleting Issues or Parts

When you are deleting issues or parts, the following types of messages may appear:

Note:
Each message displays the title of the issue or part you are attempting to delete, its destination branch abbreviation, and its designation (enumeration and chronology).

- You cannot delete the issue because the linked item's status or links to other records prevent it from being deleted. To delete the issue, you must first change the item's status or links. See "Delete bibliographic or item records" in the *Polaris Cataloging Guide 4.1R2*.
- Retention settings in the linked serial holdings record indicate the issue is retained. You can click **Yes** to continue deleting the issue/part.
- No other records are linked to the bibliographic record. If there are no other item records linked to this bibliographic record, a message asks you to confirm that you want the **Display in PAC** check box to be cleared in the bibliographic record. You can click **OK** to clear the **Display in PAC** check box in the linked bibliographic record and continue.
- There are route list records linked to the issue. You can click **OK** to continue.

Combine issues

Sometimes publishers deviate from a normal publication pattern and produce a combined issue. You can combine issues when this deviation from the established publication pattern happens once. If the publication will regularly include this combined issue, you should modify the publication pattern (see "Set up the serial publication pattern regularity" on page 41).

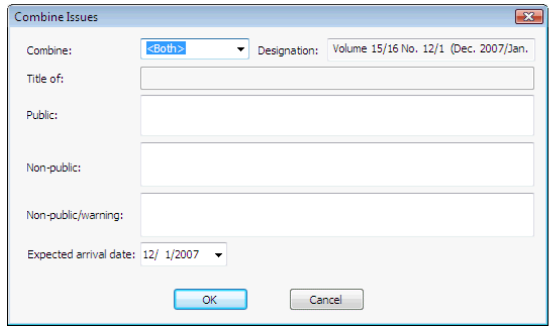
Note:
Only expected issues, not parts, can be combined.

Follow these steps to combine expected issues.

1. Display the Subscription Check In workform that contains the expected issues you want to combine.
2. Select the two expected issues you want to combine.
3. Select **Tools, Combine issues** from the menu, or right-click and select **Combine issues** from the context menu.

   The Combine Issues dialog box appears.

Tip:
The two issues must be linked to the same publication pattern to be combined. If they are not linked to the same publication pattern, an error message appears, and the issues are not combined.



4. Select **Enumeration**, **Chronology**, or **Both** in the **Combine** box. If the combined issue is for supplements or indexes, modify the title information for the new combined issue.

5. Update the notes information in the **Public**, **Non-public**, **Non-public/warning** fields.

6. Click **OK** to combine the two issues.

   The original two issues are deleted, and the expected combined issue appears on the Subscription Check In workform.

   Note:
   When two issues are combined, the resulting issue takes the chronology date from the earlier issue, and the expected arrival date is calculated based on the earlier issue's chronology date.

Uncheck in issues or standing order parts

Sometimes a serial issue or standing order part is mistakenly checked in for the wrong title. In these cases, you can reset the status of an issue or part record from Received to Expected, thus "undoing" check-in. Undoing the check-in for issues and parts automatically deletes any serial item records which may have been created at check-in. Follow these steps to uncheck in issues.

1. Open the Subscription Check In or Standing Order Part Check In workform for the serial title and copy that need resetting.
2. If the received issues or parts do not display in the Check In workform, select **Received** in the **Issue/part status** box above the list.
3. Select the issue or part with a Received status in the Issues list.
4. Select **Tools, UnCheck In**, or right-click and select **UnCheck-In** from the context menu.

   The issue or part's status reverts to its status before it was checked in (Expected, Claimed, Pending Claim, Not Available, or Never published).

   Any serial item records automatically created as a result of check-in are deleted unless there are conditions that prevent their deletion. See "Delete bibliographic or item records" in the *Polaris Cataloging Guide 4.1R2*.

Tip:
You can press **CTRL** and select multiple issues or parts.

Change an issue or part's status

If you did not receive an issue as expected and the publisher informs you that the issue or part cannot be supplied, you can change the status from Expected to Never published or Not available. If you have the **Display of Issues on Check In** Acquisitions/Serials parameter set to exclude these statuses from display, these issues will not display in the Check In workform, but they are retained for statistical purposes. See "Setting the Check In Display" on page 122.

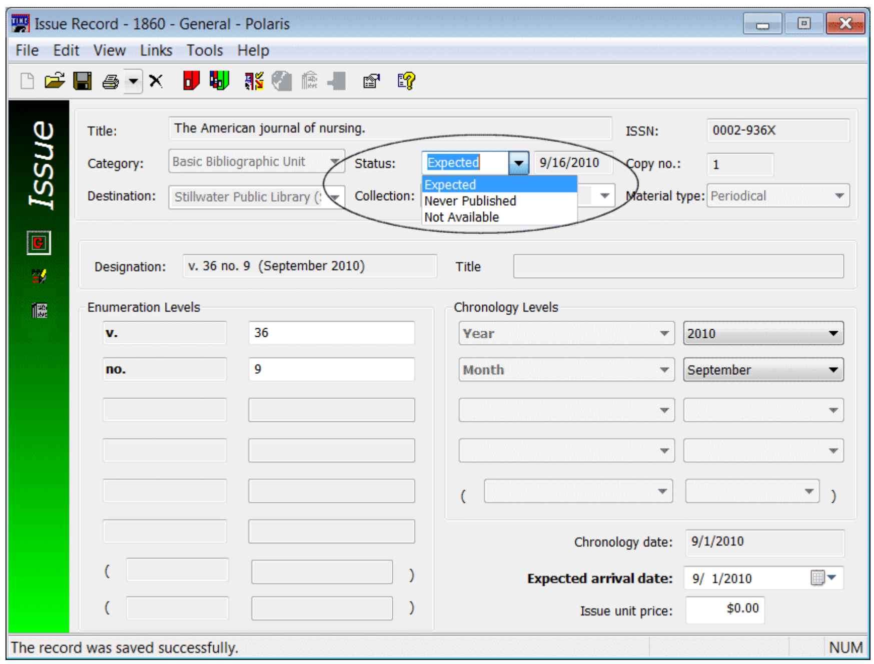
Follow these steps to change a serial issue or part's status.

1. Select the issue or part and select **Open**.

   The Issue or Part workform appears.

2. Select the status in the **Status** box.

   The drop-down list of statuses appears.



3. Select the status for the issue or part, and select **File, Save**.

   The issue or part is saved with the new status you selected.

Delete a serial holdings record

If you no longer need a serial holdings record, you can delete it, but you must first delete all linked issues or parts. See “Delete single or multiple serial issues/parts” on page 90. Follow these steps to delete a serial holdings record.

1. On the Serial Holdings workform, select **File, Delete** or click .

   A message asks if you want to permanently delete the record.

2. Select **OK**.
   - If all linked parts or issues have a status of Expected, the serial holdings record is deleted and all linked issues or parts are also deleted.
   - If there are linked issues or parts with a status of Never published or Not available, a warning message appears, but you can delete the serial holdings record.

   The serial holdings record is deleted if no issues or parts are linked to it.

Claiming in Serials

An issue or part may be claimed if it does not arrive when expected, it arrives damaged, or the wrong issue is received. To set up claiming, you enter the claiming data in the Supplier record, and the data is copied automatically to the Serial Holdings records linked to this supplier. You can change the claiming data in the Serial Holdings record, and add more claiming intervals beyond those in the Supplier record.

You can set up manual or automatic claiming, and you can specify the claim notification method and text in Polaris Administration. See "Set up claiming notification" on page 132.

If you select manual claiming, issues or parts go to Pending claim status (via overnight processing), and they remain pending on the Claim Alert List until you claim the issue or part. When you claim the issue or part from the Claim Alert List, the issue or part's status changes to Claimed. As each issue or part is claimed manually, a notice is generated as an e-mail or printable notice, depending on how you set the notice method in Polaris Administration.

If you select automatic claiming, issues or parts change to a Claimed status via overnight processing. The claim notices are generated automatically as e-mail or printable notices, depending on your claiming notification method.

When the claiming method is set to e-mail, the e-mail notices are generated (either by automatic or manual claiming), and they are sent out by the e-mail manager. When the claiming method is set to print, the notices are also generated, but you must print the notices by going to **Utilities, Reports and Notices**. See "Print a claim notice" on page 105.

This unit covers the following topics:

Entering Serials Claiming Information

You enter serials claiming criteria and the claiming notice address in the Supplier workform. The claiming criteria are copied to the Serial Holdings Record workform for any linked serial holdings records. If needed, additional claiming intervals can be added in the Serial Holdings Record workform.

This unit covers the following topics:

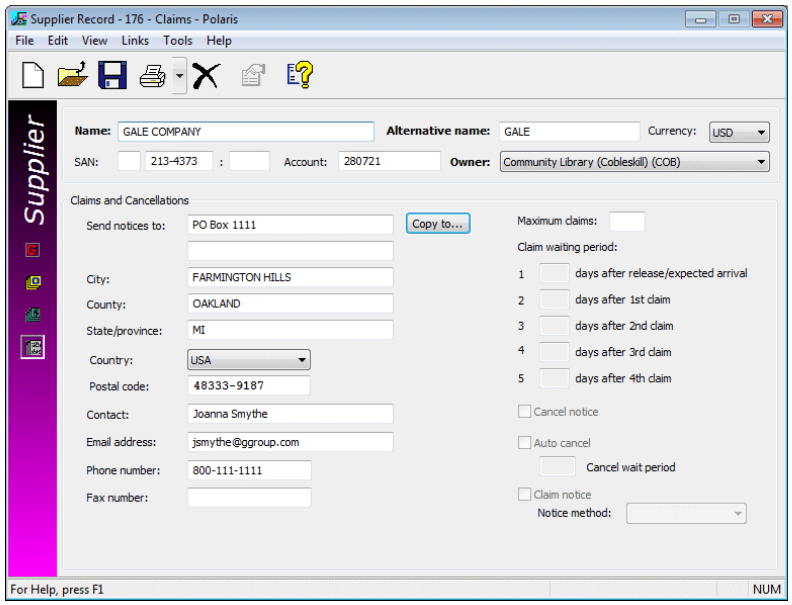
Enter serials claiming information in the Supplier workform

Follow these steps to enter claiming information in the Supplier workform.

Note:
For more information about supplier records, see "Setting Up Supplier Records" in the *Polaris Acquisitions Guide 4.1R2*.

1. On the Supplier Record workform, select **View, Claims** or click .

   The Claims view appears.



2. Type the number (1-5) in the **Maximum claims** box to indicate the number of claims that you want to go to the supplier.

   Note:
   You can send more than five claims for serials issues/parts. Enter the five claiming intervals in the Supplier record, and add more claiming intervals on the Serial Holdings record.

3. In the **days after release/expected** box, type the number of days you want to elapse between when a serial issue is expected and the time when the first claim is generated.

4. Enter the claim cycle information as follows:

   a) Type a number in the **1st claim** box to indicate the number of days that must pass after the first claim is generated before the second claim is generated.

   b) Type a number in the **2nd claim** box to indicate the number of days that must pass after the second claim is generated before the third claim is generated.

c) Type a number in the **3rd claim** box to indicate the number of days that must pass after the third claim is generated before the fourth claim is generated.

d) Type a number in the **4th claim** box to indicate the number of days that must pass after the fourth claim is generated before the fifth claim is generated.

> **Note:**
> The cancel information is not relevant for claimed serials issue because individual issues are not cancelled. Rather, the whole subscription may be cancelled or not renewed.

5. Select **Claim notice** if you want claim notices to be sent.
6. If you have selected the **Claim notice** box, select the **Notice method**.

> **Note:**
> If **Supplier Preference** is selected in the **Notification method** box in Notification options in Polaris Administration, the notice method you set in the Supplier record will be used to send a claim notice. See "Set up claiming notification" on page 132.

7. Select **File**, **Save** to save the record.

The claiming data is filled in for any serials holdings records that are linked to this supplier record. You can change the claiming information in the serial holdings records, or you can add more claiming intervals beyond the five in the supplier record. See "Enter claiming criteria in the serial holdings record" on page 100.

Related Information

Printing Serial Claim Notices - If you have selected **Print** for the notice method in the Supplier record and the notification option in Polaris Administration is set to **Supplier Preference** or **Print**, you can print claim notices. See "Print a claim notice" on page 105.

Enter claiming criteria in the serial holdings record

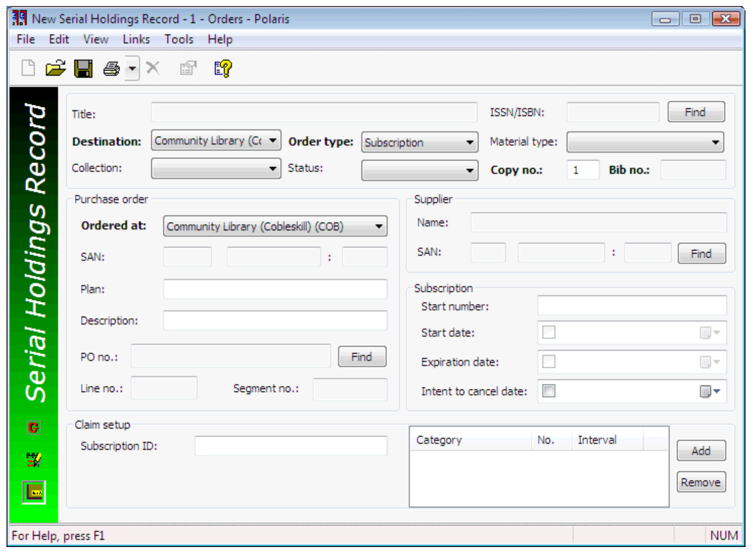
Follow these steps to add claiming information in the Serial Holdings Record workform.

1. Open the Serial Holdings Record workform.

   Note:
   If you are creating a new serial holdings record, see "Create a serial holdings record" on page 25.

2. Select **View, Orders.**

   The Serial Holdings Record, Orders view appears.



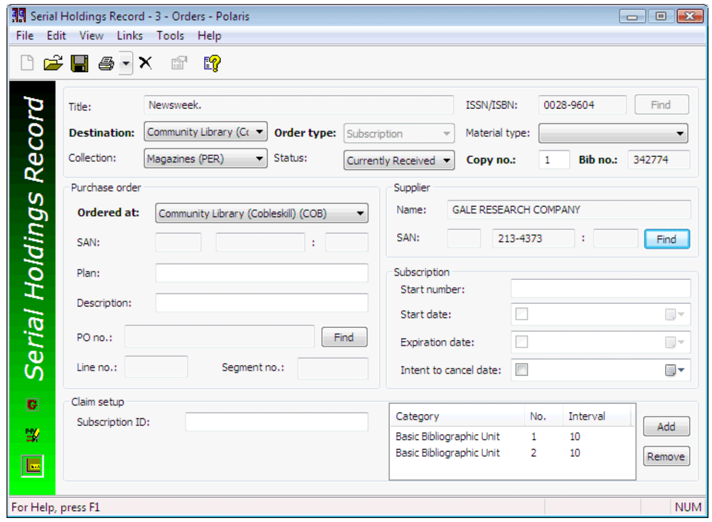
3. Link to the purchase order and/or subscription record, if applicable. See "Enter order data for a serial holdings record" on page 30.

   Note:
   It is not necessary to have a linked purchase order or subscription record to do serials claiming.

4. If the supplier's name and SAN fields are not already filled in, click **Find** to search for and select the supplier for the serials title.

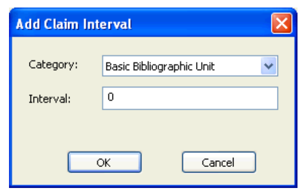
   The supplier's name and SAN are filled in, and the claiming information for the basic bibliographic unit appears in the lower right corner of the workform. Up to five claiming intervals can be defined in the Supplier record for the basic bibliographic unit. You can define more claiming intervals for the basic bibliographic unit or enter claiming data for the serial title's index or supplement on the Serial Holdings Record workform.

5. Under **Claim Setup**, type the vendor's identification number for the subscription in the **Subscription ID** box. This number is printed on the claim notice.



6. Click **Add** if you want to add more claims to the claiming data in the supplier record.

   The Add Claim Interval dialog box appears.



7. Select the type of publication in the **Category** box, type the number of days between the last claim and the next claim in the **Interval** box, and click **OK**.

   When a serial issue is not received by the number of days in the **Days after released/expected arrival** box in the Supplier record, the claiming cycle begins. When the claiming cycle has passed without receipt of the issue or part, the serial issue appears on the Claim Alert List unless you have chosen automatic claiming.

   If your library has chosen automatic claiming, notices are generated and they are e-mailed automatically (if you have selected e-mail as your notice method), or you can print them in a batch.

   Tip:
   All e-mail notices are sent automatically according to the schedule for the SQL Server job Notice Processing. This includes overdue, billing, fine, hold request, reminder, routing, and claim notices.

Related Information

- "Set up claiming notification" on page 132
- "Print a claim notice" on page 105

Claiming Issues or Parts

If your library does not claim serial issues and parts automatically, you can generate claims from the Claim Alert List or from the Issue or Part workform. When you make a claim manually, the notice is generated and you can print it or e-mail it.

Note:
For more information on setting serials claiming to manual or automatic, see "Set up claiming notification" on page 132.

Claim issues/parts from the Claim Alert List

1-2-3

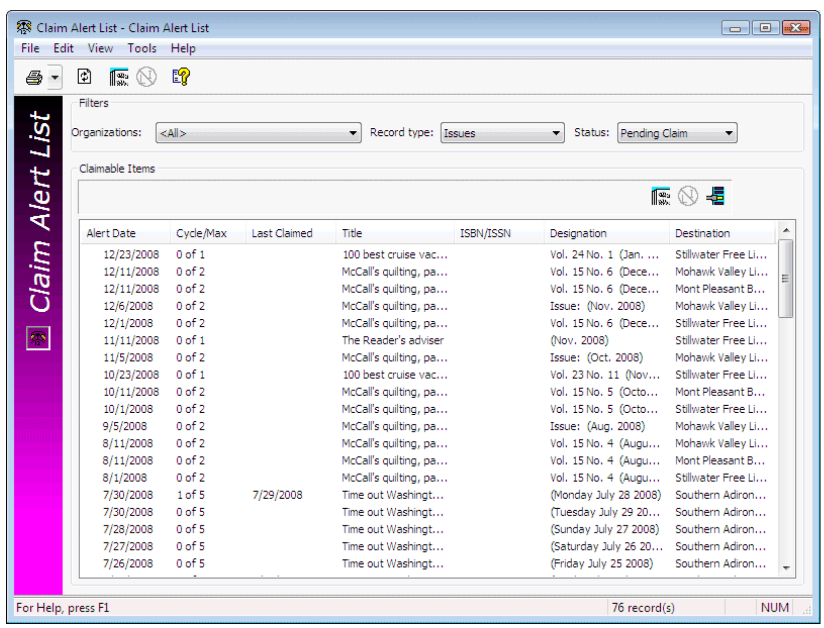
Follow these steps to claim serial issues/parts that appear on the Claim Alert List.

Tip:
Use the **Organizations** and **Status** boxes to filter the Claim Alert List. To see more claims, drag the lower right-hand corner of the Claim Alert List window. Expand the columns by dragging the borders of the column headings.

1. Select **Serials, Claim Alert List** from the Polaris Shortcut Bar.

   The Claim Alert List appears.

   Note:
   The Claim Alert List shows serial issues or parts that are eligible to be claimed. If you select Claim Alert List from the Acquisitions menu, you will see the purchase order line items that are eligible to be claimed. You can also see the purchase order line items information if you change the record type.

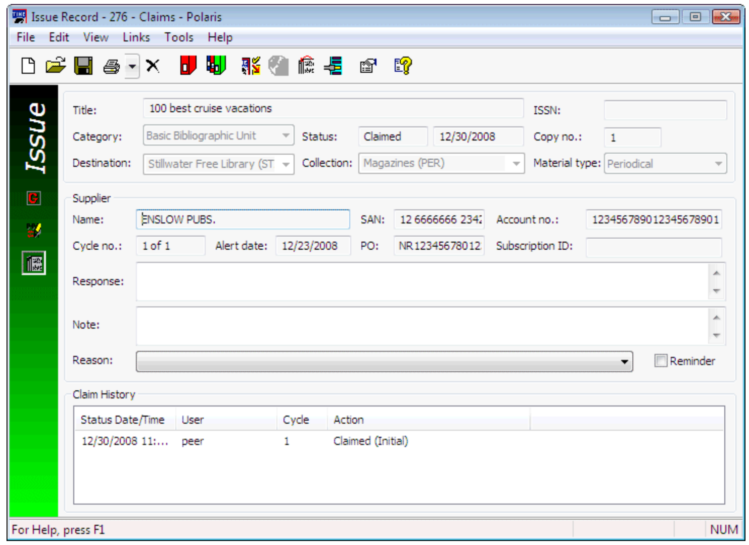


Tip:
Click on the menu bar to claim all items, or click this icon in the list bar to claim selected line items.

2. Right-click the issue or part for which you want a claim to be sent to the supplier, and select **Claim** from the context menu.

Note:
You can also claim all the issues/parts that appear on the Claim Alert List by selecting **Tools, Claim** from the menu bar on the Claim Alert List.

The issue or part record is updated, and the claim history appears in the bottom of the Issue or Part workform. You can double-click the issue or part in the Claim Alert List to go to the Issue or Part workform.



3. If you selected **Print** as your notice method, the notice is generated, but you need to print it. See “Print a claim notice” on page 105.

   If you selected e-mail as your notice method, the claim notice will be e-mailed automatically according to the schedule for the SQL Server job, Notice Processing. All e-mail notices (overdue, billing, fine, hold request, reminder, routing, and claim) are handled by this job.

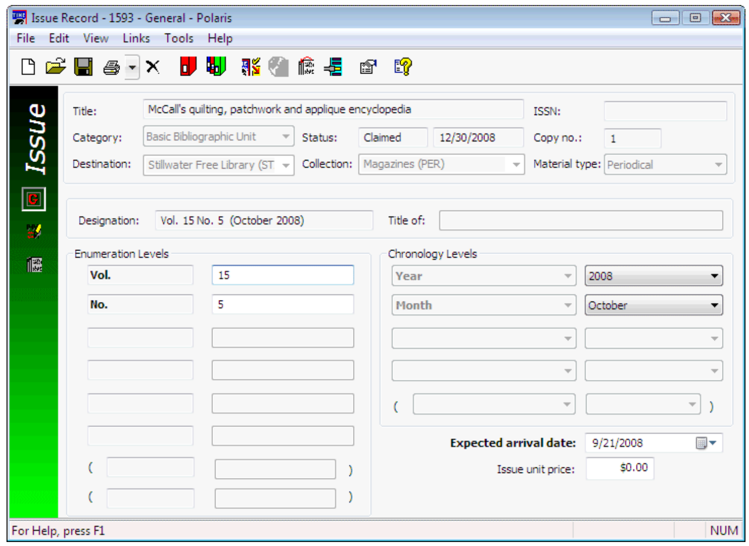
Related Information

Selecting claiming notification methods - See “Set up claiming notification” on page 132.

Claim from the Serial Issue/Part workform

If you did not select **Automatic claiming**, you can manually generate claims from the issue or part record. You can search for issues or parts by title and limit by the status of Pending Claim to find specific issues. Follow these steps to claim from the Serial Issue or Part workform.

1. Open the Serial Issue or Serial Part workform for the issue or part that is eligible to be claimed.



2. Select **Tools, Claim** or click .

   A message asks if you are sure you want to claim the issue or part.

3. Click **OK**.

   The claim data is recorded in the Claims view of the Issue or Part workform under **Claim History**. A claim notice is generated and sent to the supplier via e-mail, if you have set up the notice method as **E-mail**. If your claim notice method is set to **Print**, you can print the notice.

Related Information

- **Selecting claiming notification methods** - See "Set up claiming notification" on page 132.
- **Printing a claim notice** - See "Print a claim notice" on page 105.

Print a claim notice

Follow these steps to print a claim notice.

Tip:
Claim notice options are set in Polaris Administration. See "Set up claiming notification" on page 132.

1. Select **Utilities, Reports and Notices.**

   The Polaris Reports dialog box appears.

2. Select **Notices, Serials, Serial Claim Notice.**

   The Parameters dialog box appears.

3. Select the organization for which you want to print notices and the date range (**Start date** and **End date**) to indicate the notices you want to print.

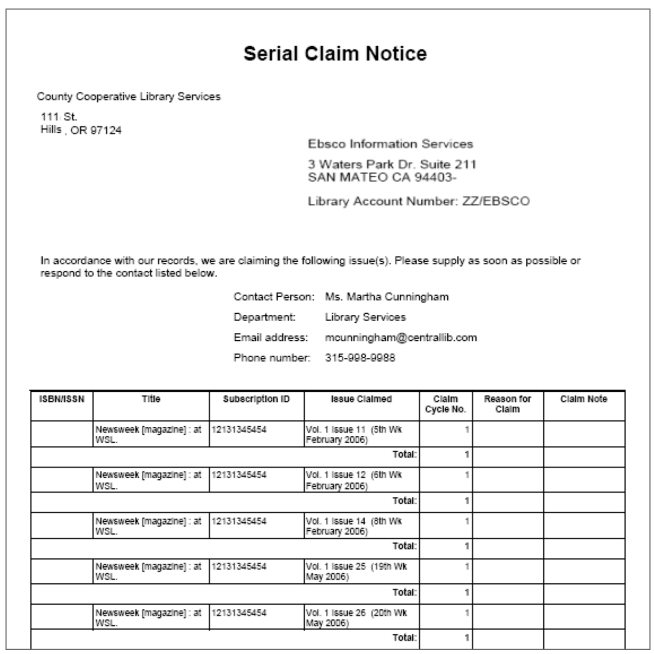
   Note:
   If you do automatic claiming and print claim notices, all the automatically-generated claim notices will be printed for the date range you specified.

   The Print Preview dialog box appears with the claim notices displayed.

4. Select **File, Print** to print the notice.

   You can fax or mail the claim notices to the serials supplier.

   Note:
   The Subscription ID is printed on the claim notice if you entered it on the Orders view of the Serial Holdings record. This ID is the vendor number for the subscription.



Serial Claim Notice

County Cooperative Library Services
111 St.
Hills , OR 97124

Ebsco Information Services
3 Waters Park Dr. Suite 211
SAN MATEO CA 94403-
Library Account Number: ZZ/EBSCO

In accordance with our records, we are claiming the following issue(s). Please supply as soon as possible or respond to the contact listed below.

Contact Person: Ms. Martha Cunningham
Department: Library Services
Email address: mcunningham@centrallib.com
Phone number: 315-998-9988

ISBN/ISSN	Title	Subscription ID	Issue Claimed	Claim Cycle No.	Reason for Claim	Claim Note
	Newsweek [magazine] : at WSL.	12131345454	Vol. 1 Issue 11 (5th Wk February 2006)	1		
			Total:	1		
	Newsweek [magazine] : at WSL.	12131345454	Vol. 1 Issue 12 (6th Wk February 2006)	1		
			Total:	1		
	Newsweek [magazine] : at WSL.	12131345454	Vol. 1 Issue 14 (8th Wk February 2006)	1		
			Total:	1		
	Newsweek [magazine] : at WSL.	12131345454	Vol. 1 Issue 25 (19th Wk May 2006)	1		
			Total:	1		
	Newsweek [magazine] : at WSL.	12131345454	Vol. 1 Issue 26 (20th Wk May 2006)	1		
			Total:	1		

Related Information

Polaris Reports - See "Using Polaris Standard Reports" in the *Polaris Basics Guide 4.1R2.*

Routing Serial Issues

When you check in a serial issue, you can print a route slip to attach to the issue if you want to route it to several people. In order for a route slip to print, the serial holdings record, or individual issue must be associated with a route list.

The default printer attached to the workstation where you are doing serials check in determines the type of route slip that is printed. If the default printer is a receipt printer, a standard type of route slip is printed on a 3.5 inch receipt slip. If the default printer is not a receipt printer, the route slip prints on an 8.5 x 11 sheet.

> **Note:**
> If you print route slips on a receipt printer, you cannot customize the text that appears on the slip.

Your Polaris Administrator can set up route lists defaults, and you set up the route lists in Serials using the Route List workform:

- **Route list defaults profile** - Your Polaris Administrator can set up the Route List defaults profile to specify the defaults such as the text to appear on route slips, the issue details (title, designation, collection, etc.) and the print method (batch or automatic). See “Set up serials route list defaults” on page 128.
- **Route List workform** - Use this workform to specify the names of the people to whom the issue will be routed and link the serial titles (serial holdings records) or specific issues that you want routed. For information on setting up route lists, see “Creating Route Lists” on page 107.

> **Note:**
> If you want a notice sent to people on the route list that the issue is being routed to them, you can set up routing notices in Polaris Administration. See “Set up routing notices” on page 130.

This unit covers the following topics:

Creating Route Lists

A route list includes the serials to be distributed, the people to whom the serials are distributed, and the time period for which the serials are to be routed. You can add specific issues to a route list, or you can add a serial holdings record to a route list so that each issue of the serials title is routed as it is checked in.

Your Polaris administrator can set up default values for your library's route slips. See "Set up serials route list defaults" on page 128. The values can be changed when you change individual route lists, but the default settings remain unless they are changed in Polaris Administration.

See the following topics:

- "Create a route list" on page 107
- "Add members to a route list" on page 109
- "Add a serial holdings record or an issue to a route list" on page 109
- "Copy a route list" on page 110

Create a route list

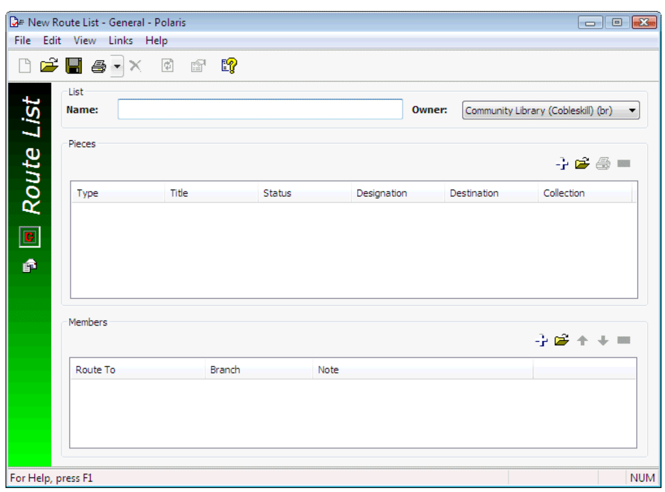
Follow these steps to create a route list.

1. Select **File, New** from the Polaris Shortcut Bar.

   The New dialog box appears.

2. Select **Route List**, and click **OK**.

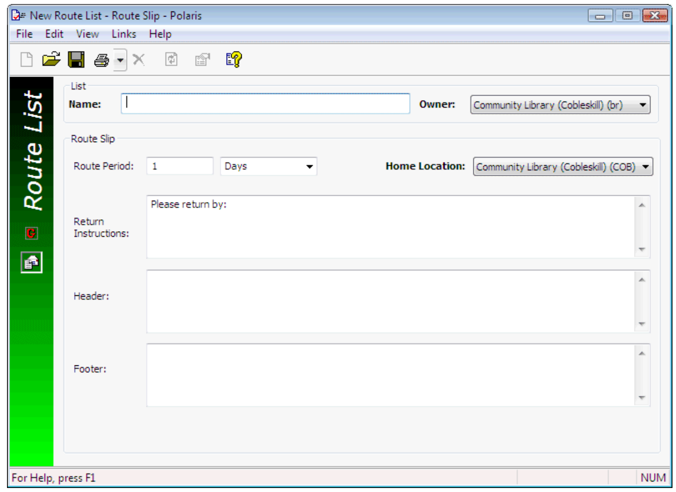
   The Route List workform appears.



3. Type a name for the route list in the **Name** box.
4. Select the library or branch in the **Owner** box.

5. Select **View, Route Slip** from the menu.

   The Route Slip view appears.



Important:
If you print route slips on a receipt printer, only the **Return by** date (calculated from the **Route Period**), the title and designation of the issue, and the list of names appear the route slip. If you print route slips on 8.5 x 11 sheets of paper, the route list name, owner, return by date, home location, return instructions, and header and footer are printed.

6. Indicate the time period for which you want the piece routed by typing a number and selecting **Days** or **Weeks** in the **Route Period** boxes. The **Return by** date on the route slip is calculated using this route period.

   Example:
   If you enter 5 days and the issue is checked in on March 1, 2012, the route slip will print with Return by: 3/6/2012. (The date may display differently depending on your regional settings.)

7. Add the people to whom you are routing the serials (see “Add members to a route list” on page 109).

8. Add the serial holdings records for the titles you want to route, or add a specific issue (see “Add a serial holdings record or an issue to a route list” on page 109).

Tip:
When you add a serial holdings record to the route list, all issues can be routed. When you add a specific issue, the one issue can be routed.

9. If you do not use a receipt printer to print route slips, you can enter additional information to print on the 8.5 x 11 route slip:
   - Select the library where you want the issue returned in the Home location box.
   - Type instructions in the **Return Instructions** box.
   - Type text to appear in the header and footer of the route slip in the **Header** and **Footer** boxes.

Related Information

“Print a route slip” on page 111

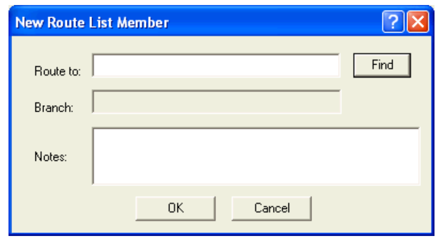
Add members to a route list

Follow these steps to add the people to whom the piece will be routed.

1. Display the route list in the Route List workform.
2. Click in the Members frame.

   The New Route List member dialog box appears.

Tip:
You can type the patron's name (last name, first name) in the **Route to** box and use the accelerator keys **SHIFT+ALT+F** keys to quickly initiate the search for the patron.



3. Click **Find** to search for and select the patron to whom you want to route the issue.

   Note:
   To route to someone who is not a registered patron, type the person's name in the **Route to** box.
4. Type any notes you want to include regarding the member.
5. Click **OK**.

   The member is added to the route list.

Related Information

- **Remove a member** - Select a member in the route list, right-click, and select **Remove** or click .
- **Change a member note** - If a note appears next to the member's name, you can change it by double-clicking on it and editing it.
- **Change the member order** - Select a member in the route list, right-click and select **Move Up** or **Move Down**, or click the up or down arrow .

Add a serial holdings record or an issue to a route list

Follow these steps to add a serial holdings record or an issue to a route list from the Route List workform.

Tip:
You can search for an issue using the Find Tool, and add it to a route list by right-clicking and selecting **Add To Route List**. You can remove an issue from a route list by selecting **Remove From Route List**.

Note:
You can add an issue to a route list when you check it in. Then, you can either print the individual route slip or print route slips in a batch. (See "Print a route slip" on page 111.)

1. Display the route list in the Route List workform.
2. Click in the Pieces frame.

   The Find Tool appears.

Tip:
You can also add a serial holdings record to a route list by selecting **Tools, Add to Route List** on the Serial Holdings Record workform.

3. Use the Find Tool to search for the serial holdings record or specific issue you want to add to the route list.

   Note:
   If you select a serial holdings record, all issues for this title can be routed. If you select an issue, only the specific issue can be routed.

4. Double-click the serial holdings record or issue, or right-click and choose **Select** to add it to the route list.

Copy a route list

Follow these steps to create a route list by copying an existing route list. The members are copied and remain in the same order, but the serial holdings records or issues are not copied to the new route list.

1. Display the route list in the Route List workform.
2. Select **File, New** from the menu.

   The New Route List dialog box appears.

3. Select **Copy Existing Workform**, and click **OK**.

   The Route List workform appears with the same member names and information, but without any issues.

4. Type a name for the new route list over the existing name.

   The new route list must have a different name or owner.

5. Add issues to the route list. See "Add a serial holdings record or an issue to a route list" on page 109.
6. Change the member list, if necessary, as well as other information on the Route List workform.
7. Select **File, Save**.

   The new route list is saved with the following copied data:

   - **Route List Name**
   - **Owner**
   - **Header**
   - **Footer**
   - **Home Location**
   - **Return Instructions**
   - **Route Period**

Printing Route Slips

You can print route slips to attach to issues that are routed to staff members or other individuals. Route slips are printed on a receipt printer if a receipt printer is the default printer for the workstation. If a regular printer is set as the default printer, the route slips are printed on 8.5 by 11 inch paper.

Note:
To print route slips, the issue or part must be associated with a route list. See “Add a serial holdings record or an issue to a route list” on page 109.

See the following topics:

- “Print a route slip” on page 111
- “Return a routed issue” on page 113

Print a route slip

Follow these steps to print a route slip.

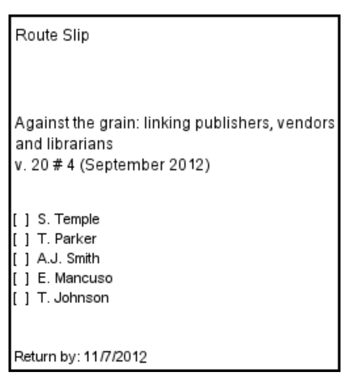
Note:
If the issue/part does not have a route list associated with it, you can select **Tools, Add to route list** on the Issue, Part, or Check In workform. Or, right-click on the issue/part in the Find Tool results list and select Add to route list. The Find Tool appears with Route List selected. Search for and select the route list that you want to associate with the issue/part.

1. Display the Check In workform for the issue you want to route.
2. Select the issue to check in, double-click it or select **Tools, Check in**.

   The issue is checked in and the route slip is printed if the print method in the Polaris Administration profile **Route list defaults** is set to **Automatic**. If the print method is set to **Batch**, the route slip is sent to a batch file that you can print by selecting **Serials, Batch Print, Route Slip**.

Tip:
You can also select the issue from the Find Tool results list, right-click and select **Check in**. The issue is checked in and the route slip is printed.

Note:
The example below shows a route slip printed on a receipt printer. Only the title of the issue, the list of people to whom the issue is routed, and the return by date is printed. If you do not use a receipt printer, more information may appear on the route slip depending on what is set in the Route List workform. See “Create a route list” on page 107.


Route Slip

Against the grain: linking publishers, vendors and librarians
v. 20 # 4 (September 2012)

[ ] S. Temple
[ ] T. Parker
[ ] A.J. Smith
[ ] E. Mancuso
[ ] T. Johnson

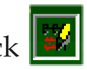
Return by: 11/7/2012

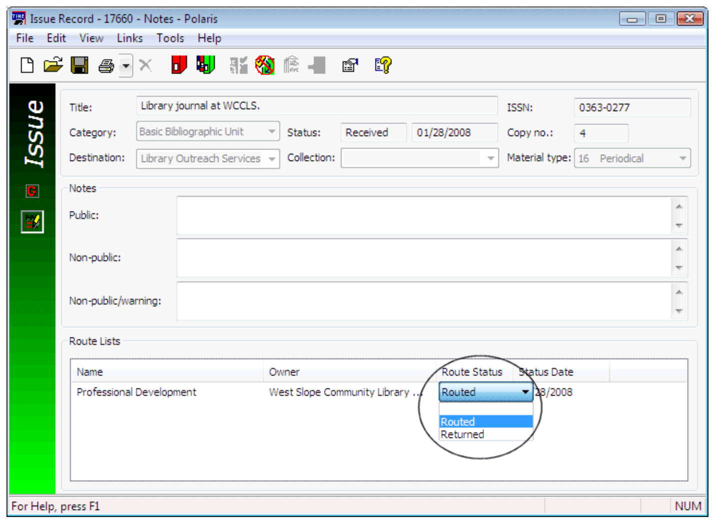
Related Information

- **Route list setup** - Route lists define the names on the route slip, the titles to be routed, the time period for which the issues are routed, and other information. For information on setting up route lists, see "Creating Route Lists" on page 107.
- **Route list defaults** - Your system administrator can set up defaults for all the route lists for your organization. See "Set up serials route list defaults" on page 128.
- **Item records linked to routed issues** - If a routed issue is linked to an item record, the item's circulation status is **Routed**. If you try to check out a routed item, you will receive an error message. Check the item in to change its circulation status from **Routed** to **In**, and then check it out. Or, go to the Notes view on the linked Issue record and change the issue's status to **Returned** or blank. The item record's circulation status will be changed to **In**.

Return a routed issue

When a routed issue is returned and there is no linked item record to check in, you must change the issue's status manually from the Issue Record workform or from the Route List workform. If there is an item record linked to the routed issue, you can check in the item record and the status of the linked issue will change to Returned. Follow these steps to change an issue's status from **Routed** to **Returned**.

1. Open the Issue Record workform for the issue you want to change, and select **View**, **Notes** or click  to go to the Notes view.
2. Select the route list, and double-click the Route Status to display the options.



3. Select **Returned** to change the issue's status from **Routed** to **Returned**.

Note:
Should you wish to set the status to blank, select blank under the Route Status.

Serials Shortcut Keys

This appendix contains charts with the shortcuts you can use with Polaris serials workflows. The cards are designed to be photocopied, trimmed, and put into transparent sleeves that can be attached to the computer monitor. You can order these sleeves from vendors such as Axzo Press at the following Web site:

http://www.axzopress.com/Products/Products_FlipCARDS.aspx

Note:
For best results, print from the pdf file for the guide instead of from the Help file.

General

Workform Help	**F1**
Open record	**CTRL+O**
New dialog box	CTRL+N
Close workform	**ALT+F4**
Delete	CTRL+D
Save record	**CTRL+S**
Properties	**F8**
Refresh	**F5**
Previous tag	**CTRL+up arrow**

Print

Print current view	**CTRL+P**
Print current list view	**CTRL+SHIFT+P**

Serial Holdings Record

Create new pattern	**CTRL+SHIFT+N**
Delete a pattern	**CTRL+SHIFT+D**
Open a pattern	**CTRL+SHIFT+O**
Pattern options	**CTRL+SHIFT+M**
Print pattern list	**CTRL+SHIFT+P**
Close a pattern	**CTRL+SHIFT+C**

Route List Workform

Open a piece	**CTRL+E**
Print a route slip	**CTRL+R**
Print a list of pieces	**CTRL+SHIFT+P**
Add a new member	**CTRL+A**
Move member up	**CTRL+U**
Move member down	**CTRL+D**
Open a member	**CTRL+M**

Subscription Record

Print a list	**CTRL+SHIFT+P**
Add a serial holding	**CTRL+A**
Remove a serial holding	**CTRL+I**
Delete a serial holding	**CTRL+D**
Serial holdings property	**ALT+8**
Renew a subscription	**CTRL+R**

Check In

Print a single label	**CTRL+ALT+L**
Print multiple labels	**CTRL+ALT+M**

Issue Record

Print a single label	**CTRL+ALT+L**
Print multiple labels	**CTRL+ALT+M**

Serials Administration

Polaris Administration settings control how Polaris data is categorized, used, and stored, and what functions are available to staff and patrons. You can make most administration settings by two methods: through the Administration Explorer, and through the appropriate workform for a specific record. For detailed information about using the Administration Explorer, finding and opening administration records, and general methods for setting permissions, parameters, profiles and tables, see the *Polaris Administration Guide*.

> **Note:**
> Topics in Polaris Administration guides and online Help use the Administration Explorer method, unless you must specifically open the record workform.

This unit explains how to configure your Polaris system to process serials in the way that is most efficient for your organization. Serials processing in Polaris includes all tasks relating to subscription maintenance, predicting issues, receiving, and routing pieces.

To enable your staff to perform certain serials tasks, you need to set up the required permissions (security) to access, create, modify, or delete records. Then, you set up the appropriate defaults and settings to streamline and standardize your serials processing.

This unit covers the following topics:

- "Serials Permissions" on page 117
- "Setting the Check In Display" on page 122
- "Setting Up the Check In Prompt" on page 124
- "Setting Delete of Issue/Part with Item" on page 125
- "Setting Up Subscriptions" on page 126
- "Setting Up Routing" on page 128
- "Setting Up Serials Claiming" on page 132

Serials Permissions

Serials permissions define who can create, access, and work with serials records and functions. Each organization can grant the appropriate permissions that enable staff members to work with serials records and control serial processing.

See the following topics:

- "Set serials security" on page 117
- "Serials Workflow Permissions" on page 118

Set serials security

Follow these steps to review and set Serials permissions.

> **Note:**
> Certain System Administration permissions are required to assign permissions. See "Setting Administration Permissions" in the *Polaris Administration Guide 4.1R2*.

1. In the Administration Explorer tree view, select the **Security** folder for the organization for which you want to set permissions.

   The Security view is displayed in the details pane.

2. Double-click the **Serials** folder in the Control Record list.

   The permissions appear under the object folders.

3. Select the permission.

   The permission groups, staff members, and workstations with that permission appear in the right pane of the Explorer.

4. Click **Assign**, and select **Permission Group**, **Workstation** or **Staff Member**.

   The Find Tool appears.

5. Use the Find Tool to search for and select the staff member, permission group, or workstation to which you want to grant the selected permission.

   The staff member, workstation, or permission group appears in the list of those that have the selected permission.

6. Select **File, Save** to save any changes.

Related Information

- **General information about setting Polaris permissions**
  - "Granting Permissions" in the *Polaris Administration Guide 4.1R2*

Serials Workflow Permissions

The following table lists serials tasks, the Polaris permissions required to do the tasks, the administrative levels at which they can be set, and the subsystems where the permissions are located. Some permissions required for Serials processing are also used in other subsystems. For example, the Acquisitions permission **Create a bib record from acquisitions and serials: Allow** is used in both subsystems. See "Set serials security" on page 117.

Tip:
Not all permissions are specific to Serials. There are other permissions which apply to Serials, but are not configured within Serials, such as the Cataloging permission **Override invalid item barcode message: Allow** and the Acquisitions permission **Create a bib record from acquisitions and serials: Allow**.

Note:

To modify Polaris Administration profiles and parameters, you must have the following permissions:

Access administration: Allow
Modify parameters: Allow
Modify profiles: Allow

For more information, see "Administration Workflow Permissions" in the *Polaris Administration Guide 4.1R2*.

Workflow	*Required Permissions*	*Administration Explorer Security Location*
Manage Serial Holdings		
Maintain serial holdings records (including publication patterns)	Access serials: Allow	System - Serials
	Serial holdings records: Create	System, Branch - Serials
	Serial holdings records: Modify	System, Branch - Serials
	Serial holdings records: Access	System, Branch - Serials
	Serial holdings records: Delete	System, Branch - Serials
Control whether Polaris automatically creates issues or part records	Access serials: Allow	System - Serials
	Serial holdings records: Access	System, Branch - Serials
	Serial holdings records: Modify	System, Branch - Serials
Manage Subscriptions		
Add a subscription	Access serials: Allow	System - Serials
	Subscription records: Access	System, Library, Branch - Serials
	Subscription records: Create	System, Library, Branch - Serials
	Funds: Access	System, Library, Branch - Acquisitions
Maintain subscription records	Access serials: Allow	System - Serials
	Subscription records: Access	System, Library, Branch - Serials
	Subscription records: Modify	System, Library, Branch - Serials
	Funds: Access	System, Library, Branch - Acquisitions

Workflow	*Required Permissions*	*Administration Explorer Security Location*
Renew or cancel a subscription	Access serials: Allow Subscription records: Cancel and Renew	System - Serials System, Library, Branch - Serials
Delete subscription records	Access serials: Allow Subscription records: Access Subscription records: Delete	System - Serials System, Library, Branch - Serials System, Library, Branch - Serials
Set subscription cancellation text and print parameters	Access serials: Allow Access reports and notices: Allow	System - Serials System - System Administration
Manage Serial Issues/Parts		
Create, access, modify, and delete issues or parts	Access serials: Allow Serial Issues/Standing Order Parts: Create Serial Issues/Standing Order Parts: Access Serial Issues/Standing Order Parts: Modify Serial Issues/Standing Order Parts: Delete Serial holdings records: Access	System - Serials Branch - Serials Branch - Serials Branch - Serials Branch - Serials Branch - Serials
Checking in serial issues/parts	Access serials: Allow Serial Issues/Standing Order Parts: Access Serial Issues/Standing Order Parts: Delete Serial Issues/Standing Order Parts: Check-in Serial Issues/Standing Order Parts: UnCheck-in Serial holdings records: Access Serial Issues/Standing Order Parts: Modify Create a bib record from acquisitions and serials: Allow (optional) Create and delete item records from acquisitions and serials: Allow (if creating item records) Default shelving scheme for new item and holdings records: Allow	System - Serials Branch - Serials Branch - Serials Branch - Serials Branch - Serials Branch - Serials System, Branch System - Acquisitions System - Acquisitions System - Cataloging
Delete serial items linked to issues or parts	Access serials: Allow Serial Issues/Standing Order Parts: Create Serial Issues/Standing Order Parts: Access Serial Issues/Standing Order Parts: Modify Serial Issues/Standing Order Parts: Delete Item records: Delete/Undelete Create and delete item records from acquisitions and serials: Allow	System - Serials System, Branch - Serials System, Branch - Serials System, Branch - Serials System, Branch - Serials System, Branch - Serials System, Branch - Acquisitions

Workflow	*Required Permissions*	*Administration Explorer Security Location*
Maintain Route Lists		
Create a route list	Access serials: Allow Route lists: Create Serial holdings records: Access Route lists: Access	System - Serials System, Library, Branch - Serials System, Branch - Serials System, Library, Branch - Serials
Modify a route list	Access serials: Allow Route lists: Access Route lists: Modify Route lists: Modify route status	System - Serials System, Library, Branch - Serials System, Library, Branch - Serials System, Library, Branch - Serials
Delete a route list	Access serials: Allow Route lists: Access Route lists: Delete	System - Serials System, Library, Branch - Serials System, Library, Branch - Serials
Set up route list defaults	Access serials: Allow Access administration: Allow Modify profiles: Allow	System - Serials System - System Administration System - System Administration
Claim Serials Issues/Parts		
Enter and change serials claiming information in supplier records	Access serials: Allow Suppliers: Create Suppliers: Access Suppliers: Modify Suppliers: Modify postal address fields	System - Serials Branch - Serials Branch - Serials Branch - Serials Branch - Serials
Generate serials claims	Access serials: Allow Claim alert list: Access Serial issues/standing order parts: Claim	System - Serials System - Acquisitions System, Branch - Serials

Workflow	*Required Permissions*	*Administration Explorer Security Location*
Set up claim notices in Polaris Administration	Access serials: Allow	System - Serials
	Access administration: Allow	System - System Administration
	Modify parameters: Allow	System - System Administration
	Access reports and notices: Allow	System - System Administration
	Suppliers: Access	Branch - Serials
	Suppliers: Modify	Branch - Serials
Generate claim notices	Access serials: Allow	System - Serials
	Access reports and notices: Allow	System - System Administration
	Claim alert list: Access	System - Acquisitions

Setting the Check In Display

You can set the display of issues or parts in the Check In workform so that only issues or parts with a specific status or statuses are displayed when the workform is opened. To see all the issues that have not been received, you can define which statuses are included in the **Not Received** category.

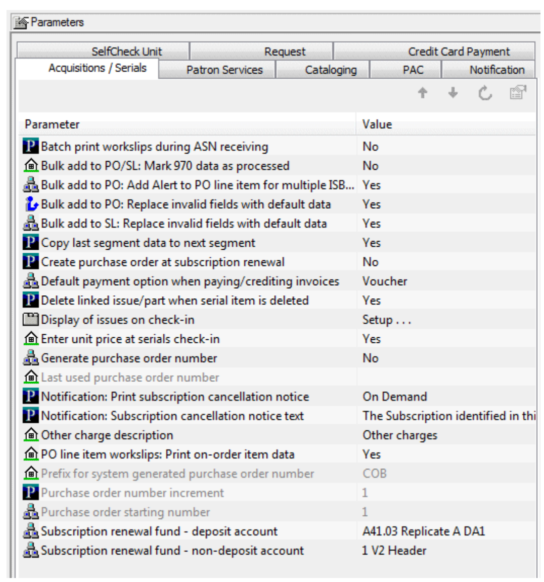
See the following topic:

- "Specify the display of issues on the Check In workform" on page 122

Specify the display of issues on the Check In workform

Follow these steps to specify how issues are displayed in the Check In workform.

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Parameters** and select the **Acquisitions/Serials** tab.



3. Select **Display of issues on Check In.**

   The Display of Issues on Check In dialog box appears.

4. Select the status of issues that you want to display in the Check In workform in the **Issue status** box.

   Note:
   If you select **<Not Received>**, you can define which statuses are included in the Not Received category. See step 5.

5. If you selected **Not Received**, define which statuses you want to include by selecting one or more check boxes: **Claimed**, **Expected**, **Never published**, **Not available**, **Pending Claim**.

6. Click **Save** to save your changes.
   - If you selected **All**, the Check In workform displays issues/parts with all statuses.
   - If you selected **Not received**, the Check In workform displays the issues/parts with the statuses you defined as **Not Received**.
   - If you selected any other status, the Check In workform displays only the issues/parts with that specific status.

Setting Up the Check In Prompt

The serials parameter **Enter unit price at serials check-in** controls whether a prompt for the price appears when you check in a serials issue. The default setting is **Yes**.

See the following topic:

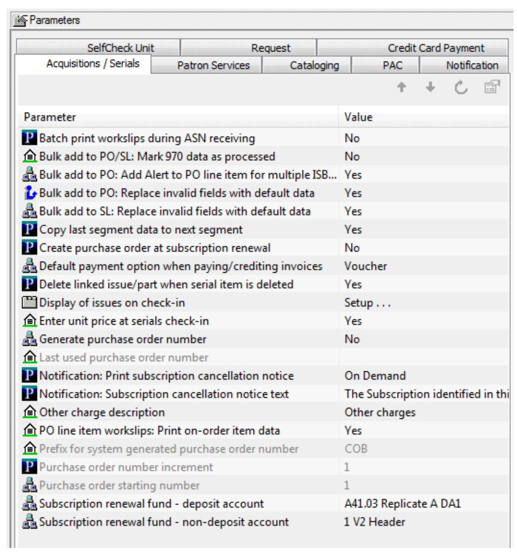
- "Set the prompt for price at check-in" on page 124

Set the prompt for price at check-in

Follow these steps to specify whether you want a price prompt to appear along with the barcode prompt when you check in serial issues.

Tip:
The **Enter unit price at serials check in** parameter applies only when the serial holdings record has the settings **Generate item records at check-in** and **Prompt for barcode** enabled.

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Parameters** and select the **Acquisitions/Serials** tab.



3. Double-click **Enter unit price at serials check-in**.
4. Set the parameter to **Yes** or **No**.
   - If the parameter is set to **Yes**, when the issues are checked in, the cursor is in the **Price** field and both fields are enabled.
   - If the parameter is set to **No**, when the issues are checked in, the cursor is in the barcode field and the price field is read-only.
5. Select **File, Save**.

Setting Delete of Issue/Part with Item

You can specify whether issues/parts should be deleted automatically when the linked item record is deleted. The Acquisitions/Serials parameter, **Delete linked issue/part when serial item is deleted** must be set to **Yes** for the linked serial record to be deleted automatically.

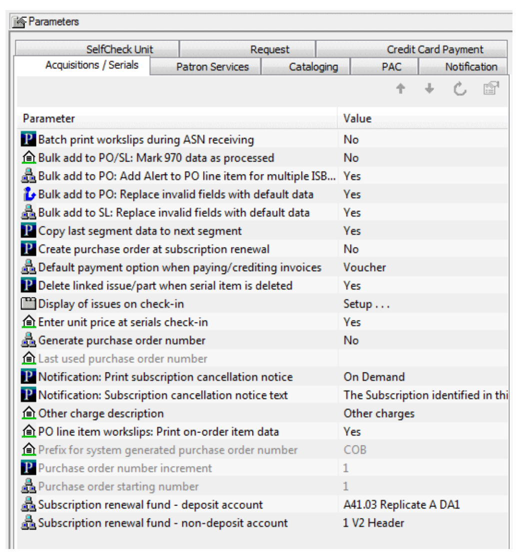
See the following topic:

- “Set automatic deletion of linked issues/parts when items are deleted” on page 125

Set automatic deletion of linked issues/parts when items are deleted

Follow these steps to specify whether you want linked serial issues/parts to be deleted when item records are deleted.

1. In the Administration Explorer tree view, expand the organization’s folder.
2. Select **Parameters** and select the **Acquisitions/Serials** tab.



3. Double-click **Delete linked issue/part when serial item is deleted**.
4. Select **Yes** to delete all linked issues/parts when linked item records are deleted in Cataloging, or select **No** to retain the issues/parts when the linked item records have been deleted.
5. Select **File, Save**.

Setting Up Subscriptions

You do not need to set up subscription records to use Polaris Serials. However, if you create a Subscription Record for each serial title your library has, you can manage your subscriptions (view, renew, cancel) from the Subscriptions List. You also have the option to create purchase orders automatically when a subscription is renewed.

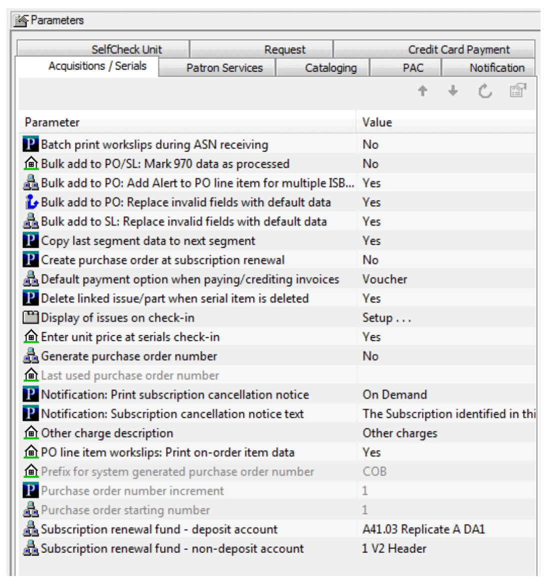
See the following topic:

- "Set up subscriptions" on page 126

Set up subscriptions

Follow these steps to set up subscriptions.

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Parameters** and select the **Acquisitions/Serials** tab.



Parameter	Value
Batch print workslips during ASN receiving	No
Bulk add to PO/SL: Mark 970 data as processed	No
Bulk add to PO: Add Alert to PO line item for multiple ISB...	Yes
Bulk add to PO: Replace invalid fields with default data	Yes
Bulk add to SL: Replace invalid fields with default data	Yes
Copy last segment data to next segment	Yes
Create purchase order at subscription renewal	No
Default payment option when paying/crediting invoices	Voucher
Delete linked issue/part when serial item is deleted	Yes
Display of issues on check-in	Setup . . .
Enter unit price at serials check-in	Yes
Generate purchase order number	No
Last used purchase order number	
Notification: Print subscription cancellation notice	On Demand
Notification: Subscription cancellation notice text	The Subscription identified in thi
Other charge description	Other charges
PO line item workslips: Print on-order item data	Yes
Prefix for system generated purchase order number	COB
Purchase order number increment	1
Purchase order starting number	1
Subscription renewal fund - deposit account	A41.03 Replicate A DA1
Subscription renewal fund - non-deposit account	1 V2 Header

3. Double-click **Create purchase order at subscription renewal**, and select one of the following options:
   - Choose **Yes** to create purchase orders automatically when subscriptions are renewed.
   - Choose **No** if you do not want purchase orders created automatically when subscriptions are renewed.
4. If you selected **Yes** in the **Create purchase order at subscription renewal** parameter, specify default funds for the automatic purchase orders:

- Double-click the **Subscription renewal fund - deposit account** parameter, and select a default fund to use when **Depository agreement** is selected in the **Payment Method** box on the Subscription Record workform, and no fund is selected.
- Double-click **Subscription renewal fund - non-deposit account**, and select a default fund to use when **Purchase** or **Free** is selected in the **Payment Method** box on the Subscription record workform, and no fund is selected.

5. Double-click **Notification: Print subscription cancellation notice**, and select **Automatic** or **Batch** to specify if cancellation notices are to be printed automatically or in a batch.
6. Double-click **Notification: Subscription cancellation notice text**, and type the text to appear on subscription cancellation notices. This text will appear on all subscription cancellation notices.
7. Select **File, Save**.

Setting Up Routing

You can use Polaris Administration settings to define the defaults that display on route slips; specify whether route slips are printed in batch or individually; specify a receipt or a regular printer for route slips; and (optionally) set up routing notices to notify members of a route list when issues are routed to them.

To print route slips on a receipt printer, the receipt printer must be the default printer for the workstation where staff members do serials check in. If another type of printer is the workstation's default printer, route slips will be printed on regular 8.5 x 11 inch paper.

Note:
The information printed on route slips is defined in the Route List workform, but only the **Return by** date, the title and designation of the issue, and the list of names appear on the route slip if you use a receipt printer. If you print route slips on 8.5 x 11 sheets of paper, the route list name, owner, return by date, home location, return instructions, and header and footer are printed. See "Creating Route Lists" on page 107.

See the following topics:

"Set up serials route list defaults" on page 128

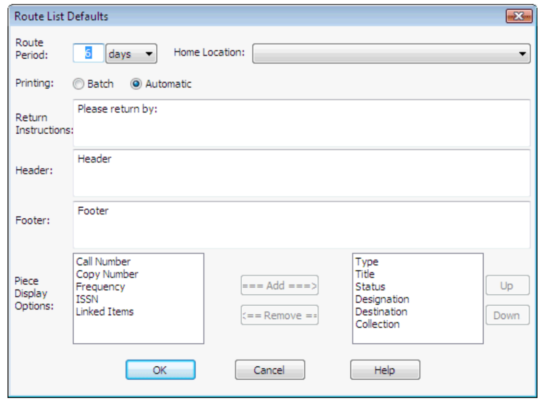
"Set up routing notices" on page 130

Set up serials route list defaults

Use the **Route list defaults** profile to define the default information that displays in the Route List workform for the organization, workstation, or staff member, and to specify how route slips are printed. Follow these steps to set up serial route list defaults.

1. In the Administration Explorer tree view, expand the folder for the organization, workstation, or staff member.
2. Select **Profiles** and click the **Acquisitions/Serials** tab.
3. Double-click **Route list defaults**.

   The Route List Defaults Dialog box appears.



4. Specify the default routing duration by typing a number and selecting **weeks** or **days** in the **Route Period** boxes.

   Note:
   The routing duration is used to calculate the **Return by** date that appears on route slips.

5. In the **Home Location** box, select the organization where the piece should be returned.

6. Select one of the following print options:
   - Select **Batch** if the route slip should be printed with all other route slips needed during a serial check-in session.
   - Select **Automatic** to print the route slip as each piece is checked in.

7. Type the instructions for returning the routed piece in the **Return Instructions** box.

8. Type the text for the header in the **Header** box. This is the information that appears at the top of the route slip.

9. Type the text for the footer in the **Footer** box.

10. Specify the columns that display in the Route List workform by selecting the data elements in the **Piece Display Options** box on the left and clicking **Add** to move them to the box on the right.

11. Click **OK** to set the route list defaults and close the Route List dialog box.

12. Select **File, Save**.

Set up routing notices

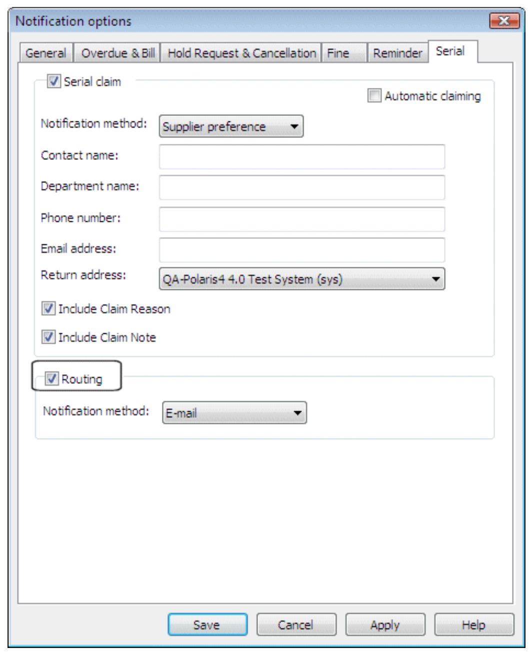
When you route an issue, you can notify the members of the route list that the issue has been routed to them. You can specify whether the notice will be sent in an e-mail or printed.

Tip:
A routing notice is not a route slip, which is a printed list of the people to whom the issue is routed. A route slip is attached to the issues being routed. For more information about route slips, see “Routing Serial Issues” on page 106. Routing notices can be e-mailed or printed.

Follow these steps to set up routing notices.

1. In the Administration Explorer tree view, expand the organization’s folder.
2. Select **Parameters** and click the **Notification** tab.
3. Double-click **Notification options**.

   The Notification Options dialog box - General tabbed page appears.
4. Select the **Serial** tab.



5. Select **Routing**.
6. Select a method in the **Notification method** box.

   Note:
   Phone and **TXT message** notification methods are not available for routing.
7. If you selected **E-mail** or **Patron Preference** in the **Notification Method** box, set up the notice in the **E-mail notice** area:
   - Type the subject of the e-mail in the **Subject** box.
   - Type the text of the e-mail notice in the **Text** box. There is no default or item-specific information for routing notices.

8. If you selected **Print** or **Patron Preference** in the **Notification Method** box, set up the notice in the **Printed notice** area:
   - Type the heading of the notice in the **Header** box. This is the information that appears in the top portion of the notice.
   - Type the text of the notice in the **Text** box. There is no default or item-specific information for routing notices.
9. Click **Save**.

Related Information

Routing serial issues - See "Routing Serial Issues" on page 106.

Setting Up Serials Claiming

An issue or part may be claimed if it does not arrive when expected, it arrives damaged, or it is the wrong issue. To work with serials claiming, staff members require permissions for serials records, including supplier records. They also require permissions to claim serial issues and parts, and manage notices. See “Serials Workflow Permissions” on page 118.

See the following topics:

Set up claiming notification

Follow these steps to specify how claim notices will be sent for serials issues or parts that are not received as expected.

> **Note:**
> If your serials claiming is centralized, set up notification at the system level. If your serials claiming is decentralized, set up notification at the library or branch level.

1. In the Administration Explorer tree view, expand the organization’s folder.
2. Select **Parameters** and click the **Notification** tab.
3. Double-click **Notification options**.

   The Notification options - General tabbed page appears.
4. Select the **Serial** tab.

   > **Note:**
   > To generate claim notices for a supplier, the **Claim Notice** box must be checked in the Supplier record.
5. Select the **Serial claim** check box.
6. Select the method by which you want to generate and send claim notices in the **Notification method** box.

   > **Note:**
   > If you want the claim notice method set in supplier records to control how notifications are sent, make sure you select all the possible notification methods on the General tab, and then set the **Notification method** to **Supplier Preference** on the Serial tab.
7. Select **Automatic claiming** to have a claim notice sent out automatically when an issue or part is eligible to be claimed.
8. In the following fields, type the contact information for the library staff member who handles serials claims:
   - **Contact name**
   - **Department name**
   - **Phone number**
   - **Email address**

9. In the **Return address** box, select the library whose return address should be used on the serial claim notices.

10. To include the claim reason on serial claim notices, select **Include Claim Reason**. The claim reason comes from the **Reason** box in the Claims view of the Issue record.

11. To include a claim note, select **Include Claim Note**. The claim note comes from the text in the **Note** box in the Issue record.

    Note:
    If the **Subscription ID** has been entered in the Serial Holdings Record - Orders view, it appears on the claim notice.

12. Click **Save** to save the notice settings you entered.

Related Information

- **Claiming serials issues or parts** - See "Claiming in Serials" on page 96.
- **General information about notices** - See "Setting Up Notices" in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Printing claim notices** - See "Print a claim notice" on page 105.

Serials Permissions, Parameters, and Profiles

These are the permissions, parameters, and profiles that you set to administer and maintain the Serials subsystem in Polaris Administration.

Note:
Not all permissions, parameters, and profiles are specific to Serials. There are other permissions which apply to Serials, but are not configured within Serials, such as **Override invalid item barcode message: Allow** and the Acquisitions permission **Create a bib record from acquisitions and serials: Allow**.

Serials Permissions

These permissions are available under **Security, Serials** at the listed organizational levels on the Administration Explorer.

Note:
To do a serials task, both the staff member and the workstation must have the permissions.

For more information on setting permissions for specific Serials workflows, see "Serials Workflow Permissions" on page 118.

Access serials
(System)

Work with serials records in Polaris.

- Allow

Route lists
(System, Library, Branch)

Route serials and other material.

- Access
- Create
- Modify
- Delete
- Modify route status

Serial holdings records
(Branch)

Work with serial holdings records including publication patterns and pattern templates.

- Access
- Create
- Modify
- Delete

Serial Issues/Standing Order Parts (Branch)	Work with serial issues and standing order parts. • Access • Create • Modify • Claim • Delete • Check-in • UnCheck-in
Subscription records (System, Library, Branch)	Maintain subscriptions. • Access • Create • Modify • Delete • Cancel and Renew
Suppliers (Branch)	Work with supplier records that belong to the branch. • Access • Create • Modify • Delete • Modify postal address fields

Serials Parameters

The following parameters are available when you select **Parameters, Acquisitions/Serials** in the System Administration Explorer at the listed organizational levels. For more information, see "Serials Administration" on page 116.

Create purchase order at subscription renewal (System, Library, Branch)
Specifies whether a purchase order should be created when a subscription is approved for renewal. The default is **No**; to enable, set to **Yes**.

Display of Issues on Check In (System, Library, Branch)
Specifies the status of issues that appear when the Check In workform is first opened. It can be set to **All** which displays all issues regardless of their status, or to Not received. You can define which statuses are included in the category Not received using the check boxes.

Delete linked issue/part when serial item is deleted (System, Library, Branch)
Specifies if issues/parts are automatically deleted when you delete the linked serial item record. The default is **Yes**; to disable, set to **No**.

Enter unit price at serials check-in
Specifies whether the **Unit price** box appears in the prompt for barcode dialog box when serial issues or parts are checked in. When it is set to **Yes** (default), and the serial holdings record has the settings **Generate item records at check-in** and **Prompt for barcode** turned on, the dialog box also includes the unit price. The default is **Yes**; to disable, set to **No**.

Notification: Print subscription cancellation notice (System, Library, Branch)
Specifies when a subscription cancellation notice is printed. The default is **Automatic**, cancellation notices are printed as individual subscriptions are canceled. If set to **Batch**, the Cancellation Notices report must be generated to print notices for canceled subscriptions.

Notification: Subscription cancellation notice text (System, Library, Branch)
Specifies the wording of the subscription cancellation notice for the organization. The default text is **The Subscription identified in this notice is being canceled**.

Subscription renewal fund - deposit account (System, Library, Branch)
Specifies the budget account to use for the subscription renewal line item on a purchase order if a fund is not specified for the subscription. This fund is used if the payment method for the subscription is a depository agreement.

Subscription renewal fund - non-deposit account (System, Library, Branch)
Specifies the budget account to use for the subscription renewal line item on a purchase order if a fund is not specified for the subscription. This fund is used if the payment method is something other than a depository agreement.

Serials Profiles

The following profiles are available when you select **Profiles, Acquisitions/ Serials** at the listed organizational levels. For more information, see "Serials Administration" on page 116.

Route List defaults (System, Library, Branch, Workstation, Staff)
Sets the default values used when creating new route lists. See "Setting Up Routing" on page 128.

Override Serials blocks (Staff)
Specifies whether the selected staff member can override blocks in Serials functions. Staff members with this profile set to **Yes** must also have permissions to the restricted functions. The default is **No**; to enable, set to **Yes**.

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