# Serials Overview

Hello, Polaris provides helpful features for working with Serials, which have multiple issues or parts that are received over time. Polaris can predict when to expect each issue, automatically create an item record for an issue when it is checked in, and inform you of any issues that are late, so you can submit a claim to the Supplier. This is all enabled by Serial records setup.

In this session, you will get an overview of working with Serials, with a focus on setting up Serial records. Along with a bib record and item records, each subscription also needs a Serial Holdings Record.

Other training sessions in this kit will go into more detail about the Serial Holdings Record, as well as the workflows for checking in Serials and for Claims.

Polaris supports two types of Serials:

* A Subscription, such as a magazine, which has one title and many issues received on a regular basis.
* A Standing Order, such as for romance novels, which is an ongoing agreement that the Supplier selects and sends books of a particular genre. Each book, called a Part of the Standing Order, has its own title.

Most libraries these days don’t use the Standing Order model in Polaris. They prefer to treat this type of ongoing purchase like other non-serial orders.

Therefore, these training sessions will focus exclusively on Subscription Serials. If your library is interested in using Standing Orders in Polaris, please contact your implementation team.

For a Subscription to be fully cataloged, it needs a Bibliographic Record, a Serial Holdings Record, and Item Records for each issue. All the issues of a magazine share one bib record.

Creating or importing bib records for each serial title held by the library is similar to the process for non-serials. Please see the Cataloging training sessions to learn more about working with bib records.

Next, you need to create a Serial Holdings Record for each Subscription. In Polaris, click New > Serial Holdings Record. Now you need to locate the bib record for the magazine. Click FIND next to the Bib control number field, and search for and open the bib record for the serial.

If you get more than one copy of a magazine, each needs its own Serial Holdings Record, even if they are at the same branch. You can select the branch this copy will be located at from the Destination drop-down menu. Click Save.

The Serial Holdings Record contains information about Location, Supplier, Subscription details, Claims, and Publication Patterns.

Publication Patterns tell Polaris when to expect an issue to arrive. The information in the Serial Holdings Record enables the Serials features mentioned earlier. Learn more about Serial Holdings Records and Publication Patterns in the corresponding training sessions.

When an issue is received and checked in, an item record will be automatically generated. For more information about this process, please watch the Checking In Serials session.

If an issue is not received when expected, an alert will notify you to submit a claim to the Supplier. Learn more about this in the Claims training session.

This setup will facilitate and check in and claims workflows.

As we mentioned, each issue of a subscription needs its own item record, but you do not need to create these manually if you set up Serial Item Templates. Polaris will use the Serial Holdings Record and the relevant Serial Item Template to automatically create item records when each issue is received and checked in.

Click New > Template > Item. This opens the form to create your New Item Template. When naming Serial Item Templates, they must start with the word Serial. Please see the Item Templates session in the Polaris Cataloging Training kit, to learn more about how to create these templates.

You now know how to set up bib, holdings, and item records for Serials.

Thanks for watching!