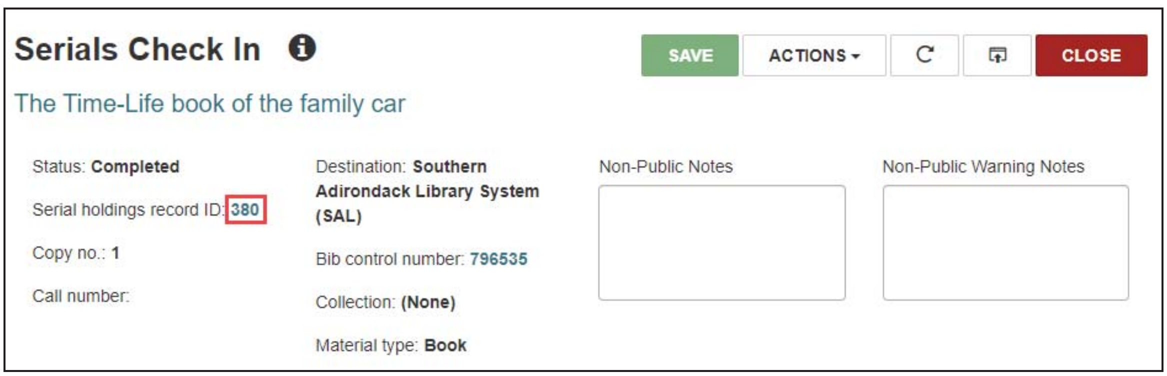
Working with Serial Holdings Records in Leap

You can use Leap to manage the Serial Holdings Record (SHR). A serial holding record is one record for all the serials or parts you receive in one series.

For the permissions needed to manage SHRs, search the Polaris staff client help for "Serials Workflow Permissions."

To get to the Serial Holdings Record workform

1. Go to **Utilities** > **Serials Check In**.
2. Search for the title of the serial or standing order part and select the title in the search results. The Serials Check In workform or the Standing Order workform opens.
3. In the Serials Check In workform header, or the Standing Order workform, select the linked Serial Holdings record ID.



The Serial Holdings Record workform appears.

You can use the Serial Holdings Record workform to manage the serial and its issues or parts as a whole. From the Serial Holdings Record workform you can do the following:

- View and edit the Serial Holdings Record Header and Details
    - Fill in the workform header.
    - Set the **Holdings Display** (impacts the serial's display in the PAC).
    - View linked publication patterns.
- Read and enter Serial Holdings Record Notes

  - Electronic Access
  - Shared Public
  - Non-Public and Non-Public/Warning
- View and enter details about Serial Holdings Record Orders
  - Purchase Orders
  - Subscription Details
  - Membership Details
- View and enter details about Serial Holdings Record Claims - Claim notices are sent for serials issues or parts that are not received as expected.

View and Edit Serial Holdings Record Header and Details

The Serial Holdings Record (SHR) workform starts with header information. From the header, you can view information about the serial holdings record such as Status, Destination, and ISSN/ISBN. You can click the Bib control number to open the Bibliographic Record workform. You can view serial holdings record properties by hovering your cursor over the **i**.

You can use the menus in the header to do the following:

- Delete the SHR - Select **Actions** > **Delete**.
- Return to Serials Check In - Select **Links** > **Serials Check In**.

You can also do the following using the Serial Holdings Record workform Details tab:

- Edit Header Information
- Set the Holdings Display
- View linked Publication Patterns

Edit the Header Information

To edit the header information

1. Go to the Details section. The Details section contains all the editable fields displayed in the header.

2. Enter the information for the following fields:
   - **Status** - Select the overall status for the serial holding. Assigning “Not currently received” as a status disables automatic prediction for this serial holdings record.
   - **Destination** - Select the branch that will house the series.
   - **Collection** - Select the collection where the series will be located.

     > **Note**:
     > The selections available in the Collection list are dependent on the organization you selected for destination branch.

   - **Copy No.** - Enter the copy number.
   - **Material type** - Select the format of the series.
3. To change the **Bib control number**, select the **Find** button beside the **Bib control number** field. The Bibliographic Find Tool opens.

   > **Note**:
   > Change the Bib control number only if you want to change the links and associations with this SHR, including the links to the subscription record, purchase orders, or invoices.

Set the Holdings Display

To set the holdings display

1. Enter the shelving scheme:
   a. Select a **Call Number Scheme**.
   b. Enter a **Prefix**.
   c. Enter a **Classification**.
   d. Enter a **Cutter**.
   e. Select **Display in PAC** if you want this information to appear in PowerPAC and Children's PAC. The display also depends on the retention information you enter. The checked in issues display according to the retention information. For more information, search the staff client help for "Displaying

Serial Titles in the PAC."

> **Note**:
> If you leave **Display in PAC** cleared, no serial issues display for the title (unless there are linked item records that are set to display).

2. Select completeness and retention information:
    a. Select a **Completeness Code** that best describes the current state of the series.
    b. Select a **Retention Designator**.

    > **Note**:
    >
    > If you select **Retained for a limited period**, then select **Latest retained** or **Previous retained** and the number of editions, issues, months, supplements, weeks or years of this serial title to retain. If you select **Latest retained**, the latest publications are retained, including the current one. If you select **Previous retained**, the previous publications, not including the current ones, are retained.

View Linked Publication Patterns

The Publication Patterns table lists the publication patterns linked to the serial holdings record.

Next, read and enter Notes in the Serial Holdings Record workform.

View and Edit Serial Holdings Record Notes

The Notes tab of the Serial Holdings Record workform gives you the ability to leave notes for patrons and library staff, and to read the notes left by other staff members. You can enter the following types of notes in the Notes view:

- Electronic Access Notes
- Shared Public Notes

- Non-public Notes
- Non-public/Warning Notes

Electronic Access Notes

For electronically delivered subscriptions, type a Listserv, URL, or email address used to manage online electronic journal subscriptions or standing orders. Only library staff can read this note.

Shared Public Notes

Enter notes that display in the Polaris PowerPAC. You can type up to 4,000 characters in the Shared public note box. Enter line breaks where you want the text to break in the Polaris PowerPAC. Patrons and library staff can read this note.

For more information, search the Polaris staff client help for "Enter public notes for a serial holdings record."

Non-public Notes

Enter a free-text note about special processing required for a title in this series. Only library staff can read this note and it appears in the Serials Check In workform.

Non-public/Warning Notes

Enter a free-text note about special attention that you want given to this title. Only library staff can read this note and it appears in the Serials Check In workform.

Next, view and enter details about Orders.

Working with Serial Holdings Record Orders

You can do the following on the Orders tab of the Serial Holdings Record workform:

- View and Edit Purchase Order Information
- Set Subscription Details
- Enter Membership Details

View and Edit Purchase Order Information

To view and edit purchase order information

1. Select **Owner** and enter **Plan** information.
   Standard Address Number (**SAN**) appears automatically when you select an owner organization.
2. To enter supplier information, select the **Find** button beside the **Supplier** field. The Supplier Find Tool opens.

Set Subscription Details

Use the Subscription Details section to specify the subscription start and duration information.

To enter subscription details

1. Enter a **Start Number**.

   > **Note**:
   > **Start Date** and **Expiration Date** are only editable for standing order parts.

2. Select (using the calendar) or type the **Intent to Cancel Date**.

Enter Membership Details

To enter membership details

1. Select **Designation** to indicate that the subscription is included in a membership to a professional organization.
   Member Name and **Member Organization** become editable.
2. Enter the **Member Name**.
3. Enter the name of the **Member Organization**.

   > **Note**:
   > **Member Name** and **Member Organization** are visible only in these fields and only to library staff.

Next, view and enter details about Claims.

Viewing Serial Holdings Record Claims

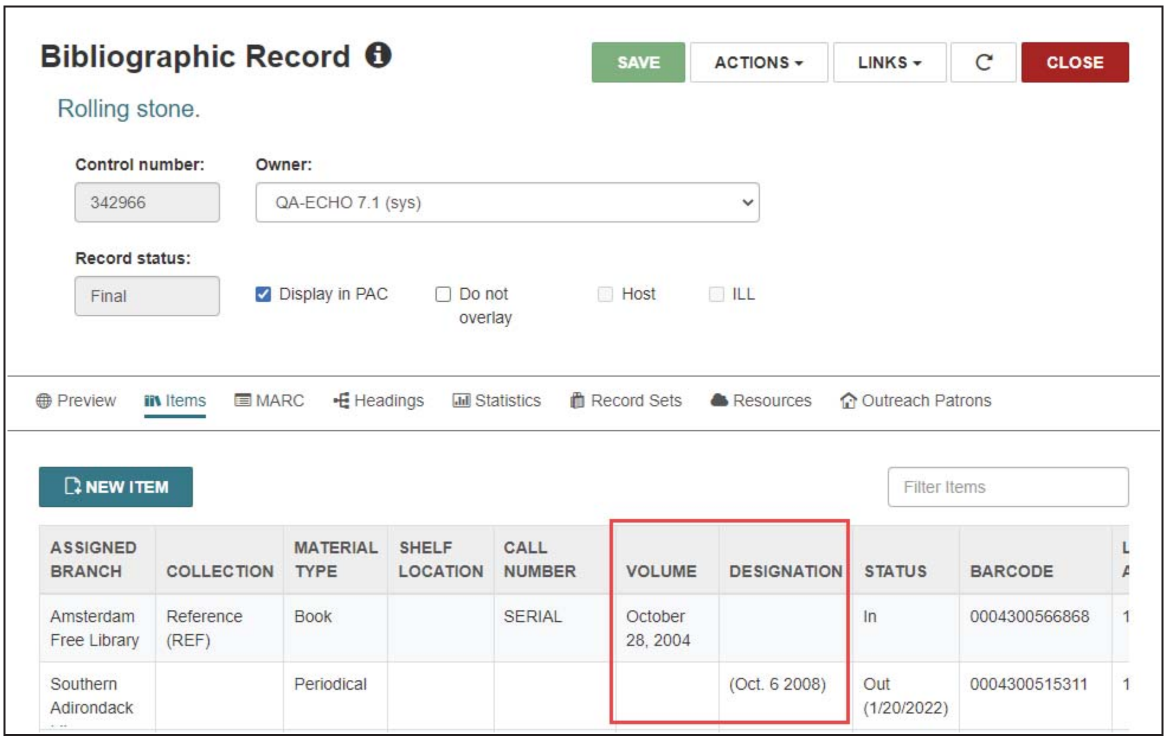
Claim notices are sent for issues or parts of serials that are not received as expected. Claims can be sent automatically from Leap based on claiming intervals defined in the supplier record you enter in the Polaris staff client. For more information about entering claiming intervals, search the Polaris staff client help for "Serial Holdings Record Workform - Orders View."

To view the claiming intervals for a supplier's subscription number

1. Find the supplier's subscription number printed on claim notices.
2. Enter the supplier's subscription number in the **Subscription ID** field. The claiming intervals appear in the table.

Improved Serials Display on the Bibliographic Record Workform

The Items view of the Bibliographic Record workform now displays a Designation column when an item attached to the bibliographic record has designation information (from a linked issue record). This makes it easier to place an item-level request for a patron without needing to open individual item records to find the correct issue.



In addition, Leap now only displays the Volume column when at least one item attached to the bibliographic record has volume information.

Creating Serial Holdings Records in Leap

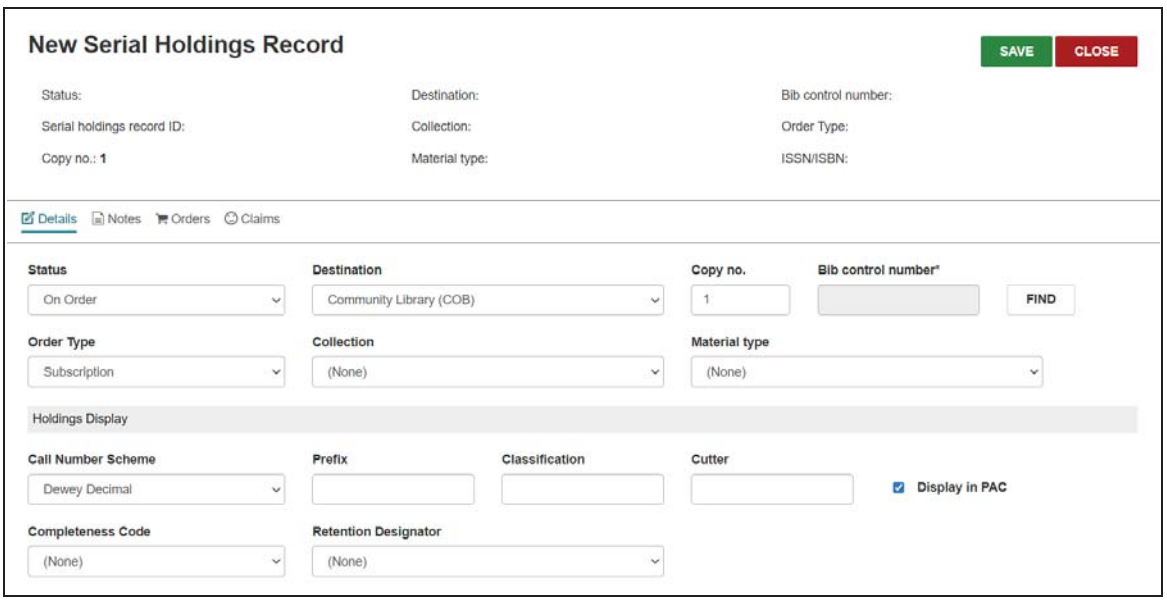
In version 7.1, we added support for viewing and editing holdings records in Leap. As of version 7.2, you can also create serial holdings records in Leap.

To create serial holdings records, you must have the **Serial holdings records: Create** permission enabled in Polaris Administration. For more information about serials permissions, search for "Serials Permissions" in the Polaris Administration (staff client) help.

To create a serial holdings record

1. Select **New** > **Serial Holdings Record**.

   The New Serial Holdings Record workform appears.

2. Enter serial holdings record details.
3. Enter notes for library staff or patrons.
4. Enter purchase order information, subscription details, and membership information.
5. Enter serial holdings record claims information.
6. Select **SAVE**.

   Leap saves the serial holdings record.

Enter Serial Holdings Record Details

To enter holdings record details

1. On the New Serial Holdings Record workform, select the Details view.
2. Select the **Status** for the serial holding. Assigning “Not currently received” as a status disables automatic prediction for this serial holdings record.
3. In the **Destination** list, select the branch that will house the series.
4. In the **Copy no.** box, enter the copy number.
5. Specify the bibliographic record control number:
    a. Select the **FIND** button beside the **Bib control number** field.

       The Bibliographic Record Find Tool opens.
    b. Search for a title and select it.
    c. Select **OPEN**.

       Leap populates the **Bib control number** field.
6. Select the **Order Type** for the serial holdings record.
7. In the **Collection** list, select the collection where the series will be located.

    > **Note:**
    > The selections available in the Collection list are dependent on the organization you selected for destination branch.
8. In the **Material type** list, select the format of the series.
9. In the Holdings Display section, enter the shelving scheme:
    a. Select a **Call Number Scheme**.
    b. Enter a **Prefix**.
    c. Enter a **Classification**.
    d. Enter a **Cutter**.
    e. Select **Display in PAC** if you want this information to appear in PowerPAC and Children's PAC. The display also depends on the retention information you enter. The checked in issues display according to the retention

information. For more information, search the Polaris Administration (staff client) help for "Displaying Serial Titles in the PAC."

> **Note:**
> If you leave **Display in PAC** cleared, no serial issues display for the title (unless there are linked item records that are set to display).

10. Select completeness and retention information:
    a. Select a **Completeness Code** that best describes the current state of the series.
    b. Select a **Retention Designator**.

> **Note:**
> If you select **Retained for a limited period**, then select **Latest retained** or **Previous retained** and the number of editions, issues, months, supplements, weeks or years of this serial title to retain. If you select **Latest retained**, the latest publications are retained, including the current one. If you select **Previous retained**, the previous publications, not including the current ones, are retained.

Enter Notes for Library Staff or Patrons

The Notes view of the Serial Holdings Record workform gives you the ability to leave notes for patrons and library staff, and to read the notes left by other staff members. You can enter the following types of notes in the Notes view:

- Electronic Access Notes
- Shared Public Notes
- Non-Public Notes
- Non-Public/Warning Notes

Electronic Access Notes

For electronically delivered subscriptions, type a Listserv, URL, or email address used to manage online electronic journal subscriptions or standing orders. Only library staff can read this note.

Shared Public Notes

Enter notes that display in the Polaris PowerPAC. You can type up to 4,000 characters in the Shared public note box. Enter line breaks where you want the text to break in the Polaris PowerPAC. Patrons and library staff can read this note.

For more information, search the Polaris Polaris Administration (staff client) help for "Enter public notes for a serial holdings record."

Non-Public Notes

Enter a free-text note about special processing required for a title in this series. Only library staff can read this note and it appears in the Serials Check In workform.

Non-Public/Warning Notes

Enter a free-text note about special attention that you want given to this title. Only library staff can read this note and it appears in the Serials Check In workform.

Enter Purchase Order Information, Subscription Details, and Membership Information

You can do the following on the Orders tab of the Serial Holdings Record workform:

- View and Edit Purchase Order Information
- Set Subscription Details
- Enter Membership Details

View and Edit Purchase Order Information

To view and edit purchase order information

1. Select an **Owner**.

   Standard Address Number (**SAN**) appears automatically when you select an owner organization.

2. Enter **Plan** information.

3. Enter supplier information:

a. Select the **Find** button beside the **Supplier** field.

   The Supplier Find Tool opens.

b. Search for a supplier and select it.

c. Select **OPEN**.

   Leap populates the **Supplier** and **SAN** fields.

4. To link a purchase order line item to the serial holdings record, do the following:

   > **Note:**
   > Leap requires that you add a link to a purchase order line item before you save a serial holdings record with an order type of Standing Order.

   a. Select the **LINK** button beside the PO Number field.

      Leap displays potential matching purchase order line item segments on the PO Line Item Segments dialog.

      > **Note:**
      >
      > A purchase order line item segment is a potential match if the following conditions are true:
      >
      > - The segment belongs to a purchase order with an order type of Subscription or Standing Order.
      > - The purchase order has the same bib control number, destination organization, and supplier as the serial holdings record.
      > - The segment has a status of On Order, Backordered, Out of Print, or Never Published.

   b. Select a segment.

   c. Select **CONTINUE**.

      Leap populates the **PO Number**, **PO Line Number**, and **Segment Number** fields.

Set Subscription Details

Use the Subscription Details section to specify the subscription start and duration information.

To enter subscription details

1. Enter a **Start Number**.

   > **Note:**
   > **Start Date** and **Expiration Date** are only editable for standing order parts.

2. Select (using the calendar) or type the **Intent to Cancel Date**.

Enter Membership Details

To enter membership details

1. Select **Designation** to indicate that the subscription is included in a membership to a professional organization.

   Member Name and **Member Organization** become editable.

2. Enter the **Member Name**.
3. Enter the name of the **Member Organization**.

   > **Note:**
   > **Member Name** and **Member Organization** are visible only in these fields and only to library staff.

Enter Serial Holdings Record Claims Information

Claims can be sent automatically from Leap based on claiming intervals defined in the supplier record you enter in the Polaris Administration (staff client). For more information about entering claiming intervals, search the Polaris Administration (staff client) help for "Serial Holdings Record Workform - Orders View."

To view the claiming intervals for a supplier's subscription number

1. Find the supplier's subscription number printed on claim notices.
2. Enter the supplier's subscription number in the **Subscription ID** field.

   The claiming intervals appear in the table.

Working with Publication Patterns

You can now work with publication patterns in Leap. A publication pattern is a pattern you create to predict future serials issues or parts.

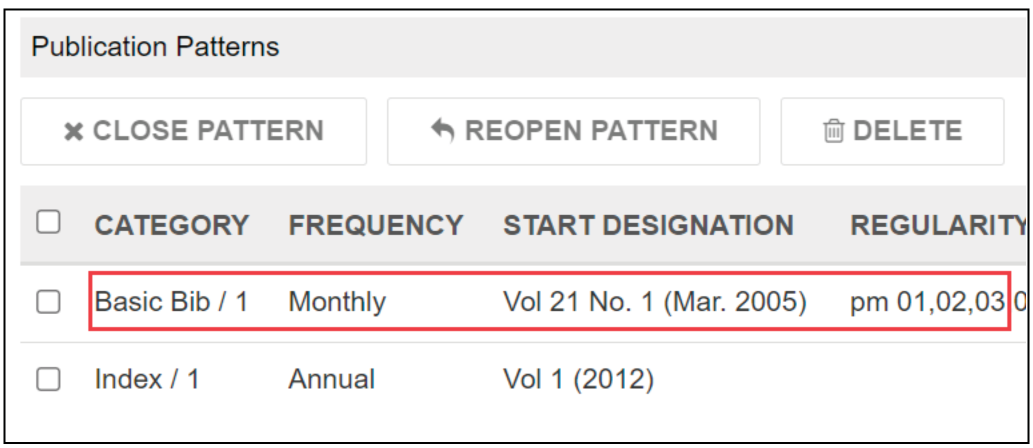
This section covers the following topics about publication patterns:

- View and Edit
- Close and Reopen
- Delete

View and Edit

To view the publication pattern workform

1. Go to **Serial Holdings Record (SHR) workform** > **Details View**.
2. Select a row in the Publication Patterns table.



The Publication Pattern workform opens.

To edit information in the publication pattern workform

1. Open the Publication Pattern workform.
2. Make changes to the following publication pattern record views:

- Details
  - **Arrival Pattern** – Enter the number of days, then select **Before** or **After** publication.
  - **Issues to Predict** – Enter the number of issues. When Leap predicts issues at serials check in, it uses this value.
  - **Unit Price** – Enter the price of the items created from the issues. When the system generates items from checked-in issues, they will contain the unit price.
  - **Generate Items at Check In** – Select if you want to generate item records when you check in an item.
  - **Prompt for Barcode** – Select if you want the system to prompt you to scan the barcode of the item when you check it in.
  - **Type of Supplement or Index** – Select the type of item if it is a supplement or index.
  - **Textual Holdings Note** – Enter more information if necessary to describe the holdings.
  - **Textual Holdings Public Note** – Enter a note that will display withholdings information to patrons in PAC.
  - **Textual Holdings Non-Public Note** – Enter a note that displays to library staff only.
- Designation
  - **Frequency** – View the publication frequency.
  - **Start Date** and **End Date** – Select the date the publication starts and then select the date the publication ends.
  - **Starting Designation** – View the starting enumeration and chronology based on the selected enumeration and chronology values and the start date.
  - Chronology **Setup** – View a preset setup.
  - Enumeration **Setup** – View a preset setup.

> **Note**:
> You can create these presets in the Polaris Administration (staff client). For more information, search the Polaris Administration (staff client) help for "Pattern Options Window."

- Regularity Pattern

  All fields in this view are read only. You can edit these fields in the Polaris Administration (staff client). For more information, search the Polaris Administration (staff client) help for "Pattern Options Window."

3. Select **SAVE**.

Close and Reopen

To close a publication pattern

1. Go to the **Serial Holdings Record (SHR) workform** > **Details View**.
2. Select the checkbox beside a row in the Publication Patterns table.

   Publication patterns must have a status of Open before they can be closed.
3. Select **CLOSE PATTERN** above the table.

CATEGORY	FREQUENCY	START DESIGNATION	REGULARITY PATTERN	CALENDAR CHANGE	STATUS
Basic Bib / 1	Monthly	(May 2008)	pm 01,02,03,04,05,06,07,08,09,10,11,12		Open
Basic Bib / 2	Annual	(2022)			Open
Basic Bib / 3	Weekly	(12th Wk 1999 (Mar.))	cw 20/21 | ow 15 | pd su		Open
Index / 1	Annual	(2022)			Open

   A Pattern Date dialog opens.
4. Ensure the start and end dates are correct.
5. Select **CONTINUE**.

The system deletes any issues that are linked to the pattern, with a status of Expected, and a chronology date later than the end date.

To reopen a publication pattern

1. Go to the **Serial Holdings Record (SHR) workform** > **Details View**.
2. Select the checkbox beside a row in the Publication Patterns table.

   Publication patterns must have a status of Closed before they can be reopened.
3. Select **REOPEN PATTERN** above the table.

   A Reopen Publication Pattern dialog opens.
4. Ensure the start and end dates are correct.
5. Select **CONTINUE**.

   The pattern's status changes to Open.

Delete

To delete a publication pattern

1. Go to **Serial Holdings Record (SHR) workform** > **Details View**.
2. Select the checkbox beside a row in the Publication Patterns table.
3. Select **DELETE** above the table.

A Do You Want To Continue dialog opens.

4. Select **CONTINUE**.