



## POLARIS SERIALS

### Claiming Methods for Serials Issues/Parts

This guide reviews the methods for claiming serials in Polaris. There are two methods for claiming serials:

- Mediated
- Automatic

To claim a title, a supplier must be attached to the SHR and claim intervals defined on the supplier record Claim view or on the holdings record the fourth view.

Supplier Record - 16 - Claims - Polaris

File Edit View Links Tools Help

Name: EBSCO Journal Service Alternative name: EJS Currency: USD

SAN: 168-9651 Account: WPKL-123 Owner: Washington Park Library (WPKL)

Claims and Cancellations

Send notices to: 123 RIVER ST. Copy to...

City: NEWTONVILLE

County: ALBANY

State/province: NY

Country: USA

Postal code: 12128-

Contact: Bob Redman

Email address: bredman@xxx.com

Phone number: 518 444-9876

Fax number:

Maximum claims: 2

Claim waiting period:

1 14 days after release/expected arrival

2 14 days after 1st claim

3 days after 2nd claim

4 days after 3rd claim

5 days after 4th claim

☒ Cancel notice

☐ Auto cancel

☐ Cancel wait period

☒ Claim notice

Notice method: Print

For Help, press F1 NUM

# Training

Serial Holdings Record - 15 - Orders - Polaris

File Edit View Links Tools Help

Serial Holdings Record

Title: Cooking light. ISSN/ISBN: 0886-4446 Find

Destination: Big Rock Public Library (BRPL) Order type: Subscription Material type: Periodical

Collection: Magazines (MAG) Status: Currently Received Copy no.: 1 Bib no.: 116390

Purchase order

Ordered at: Washburn Public Library (WPL)

SAN: 343-3714

Plan:

Description:

PO number: Find

Line number: Segment number:

Supplier

Name: EBSCO Journal Service

SAN: 168-9651 Find

Subscription

Start number:

Start date:

Expiration date:

Intent to cancel date:

Claim setup

Subscription ID: 562145

Category	No.	Interval
Basic Bibliographic Unit	1	14
Basic Bibliographic Unit	2	14

Add Remove

For Help, press F1 NUM

**Note:** Serial claiming must be enabled in System Administration--go to Parameters/Notification/Notification Options/Serial and check the Serial claim box

Notification options

General Overdue & Bill Hold Request & Cancellation Fine Reminder **Serial**

☒ Serial claim ☐ Automatic claiming

Notification method: Print

Contact name:

Department name:

Phone number:

Email address:

Return address: Polaris Library Training System (sys)

☒ Include Claim Reason

☒ Include Claim Note

☐ Routing

Notification method: E-mail

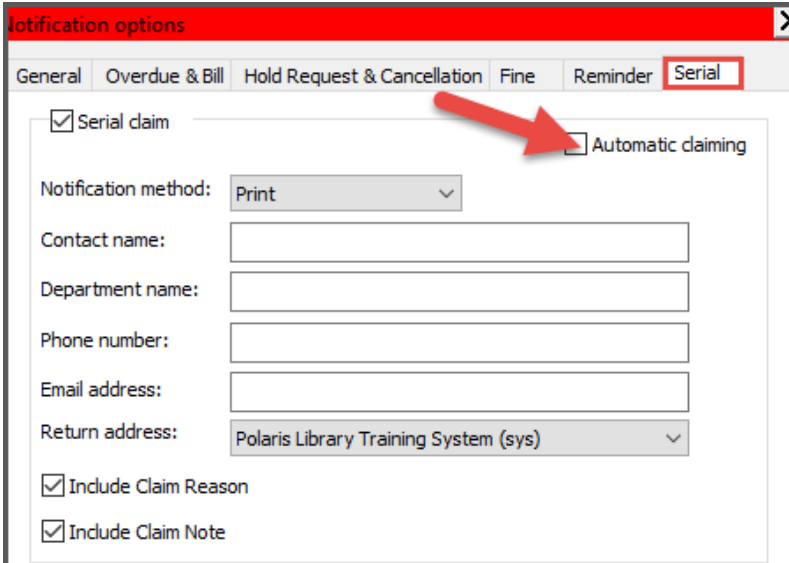
Patron preference

E-mail

Print

## Automatic Claiming

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.

If automatic claiming is selected, all issues that have not been received by a specified time are changed to a status of claimed and notices are automatically generated and sent per the Notification method defined.

**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. See [Claim Alerts List](#), and Claim Notice section of the Claim Alerts List article.

## Manual Claiming

If the automatic claiming box is unchecked, all issues that have not been received by a specified time appear on the [Claim Alerts List](#) with a pending claim status and must be mediated and claimed.

When manually claimed, the notices are sent per the Notification method defined.

# Training

Select image, right click and select Format Picture, 3rd icon from the left, select ALT TEXT and add a description for the image.

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