



POLARIS SERIALS

How to Set Up Claiming Serials

Claiming Serials in Polaris

This guide reviews the setup for claiming late issues. When a serial issue is not received by the number of days in the Days after released/expected arrival box in the Supplier or holdings 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.

Setup Claiming on the Supplier Workform

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.

On the Supplier workform, select the Claims View:

- a. Enter contact information for the Supplier
- b. Enter maximum number of claims, this indicates the number of claims that you want to go to the supplier.
- c. 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.
- d. Enter the claim cycle information as follows:
 1. 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.
 2. 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.
 3. 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.
 4. 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.
 5. 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.
- e. Select Claim notice if you want claim notices to be sent.
- f. If you have selected the Claim notice box, select the Notice method.

Note: 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.

Training

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

Setup Claiming on the Serial Holdings Record

You can change the claiming data in the Serial Holdings record, and add more claiming intervals beyond those in the Supplier record.

- Open the Serial Holdings Record workform.
- Select the Orders View to access (you can link to the purchase order and/or subscription record, if applicable, however, It is not necessary to have a linked purchase order or subscription record to do serials claiming.)
- The supplier's name and SAN are filled in (It is not necessary to have the SAN to do serials claiming), 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.
- 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.
Click Add if you want to add more claims to the claiming data in the supplier record.
- The Add Claim Interval dialog box appears.

Training

- f. 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.

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

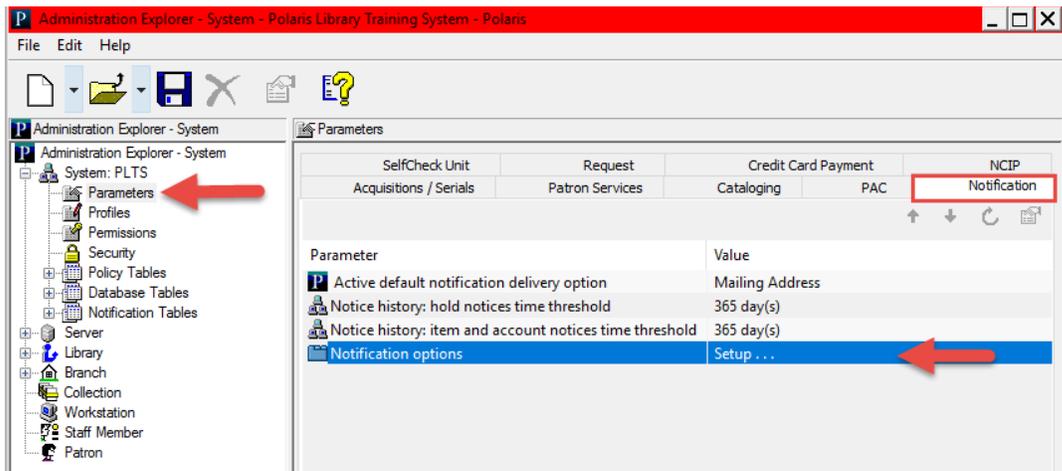
Setup Claiming Notification

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.

To specify how claim notices will be sent for serials issues or parts that are not received as expected:

1. Go to Administration Explorer tree view, expand the organization's folder.
2. Select Parameters and click the Notification tab.

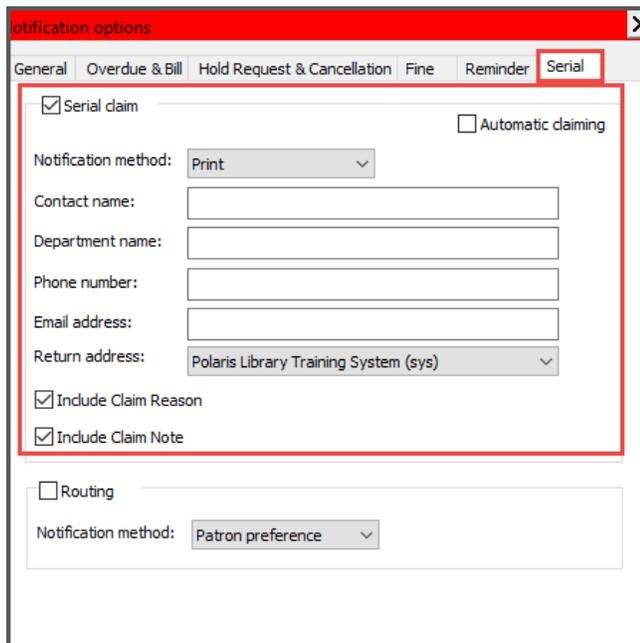
Training



3. Double-click Notification options.
4. The Notification options - General tabbed page appears.
5. Select the Serial tab.

Note: To generate claim notices for a supplier, the Claim Notice box must be checked in the Supplier record.

6. Select the Serial claim check box.
7. Select the method by which you want to generate and send claim notices in the Notification method box.



Training

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.

8. Select Automatic claiming to have a claim notice sent out automatically when an issue or part is eligible to be claimed.
9. 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
 - 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.

This publication is supplied for the exclusive use of customers of Innovative Interfaces with the understanding that it shall not be shown or distributed to anyone outside of the customer's organization without the prior written permission of Innovative Interfaces. This publication may be copied only if the copies are for the exclusive use of staff members of libraries that have purchased the Innovative system.

© 2022, Innovative Interfaces, Inc.