A Component needs to be created in a serial record before a Pub Pattern can be assigned, before Check-in can start, before the Binding feature can be used, and before Claiming can happen. It is a linear process.

Editing the Serial Order Record (matching Locations) must be completed prior to creating a component. *Editing a Serials Order Record* training document is available.

In DRA, this Component record was called the Copy record.

**Creating a Component & assigning a Pattern from the Purchase Order line item:**

1. Sign on to the **Acquisitions** client < **Orders** from the Listbar < **Search Orders**
   - Sign on to the **Cataloguing** client - will allow you to call up the bib record directly from Acq
   - Start a **OPAC** session - important to check your work, and to look at the public view

2. **Search** for the appropriate Purchase Order by whatever method is easiest (PO#, title, DBCN, etc.)
   - **Select record**, and click **Edit**
   - Confirm that PO **Location** is correct (location)
     - **if not**, must **Edit Serial Order Record**
     *Reminder:* Gift Orders & “children” of Memberships & Group Subscriptions remain “Pending”
     e.g. PO# M12345-0-jbl
   - **Select line item** & click **Details** to get to the Line Item box
   - Select **Type** tab
   - Click **Subscription Pattern**, and **Subscription Maintenance** box will open (a part of Check-In),
     and the **Component Details** tab will be open.

3. **Component** is blank, click **New** - will forward you to the **Component Name** box
   - Modify the **Component Name**, if necessary
   *Reminder:* this box only holds 50 characters, so if you abbreviate the title, do so at the end, or it will not be found in a search
     e.g. ‘Assn of Cheese Makers’ will not be found if you search ‘Association of Cheese’
   - Delete period at end of name
   - In CAPitals, enter the unbound location code (using new Voyager codes & in CAPs), e.g. KR REF
   - Leave **Check-In Title** box checked
   - Leave **Category** as basic, in most cases
   - In **Note** box, you may add a check-in or claiming note (**not** for binding notes)
   - Leave **Create Items** box unchecked
   - Leave **Default Item Type** blank
   - In **Claim** box, enter 30, or check **Don’t Claim** (e.g. gift, limited retention titles)
   - Click **Save**, and other tabs will become active
4. Select **Predictive Component Pattern** tab
- Click in **Publication Pattern Model** box & **select a frequency** (refer to your DRA printouts & in hand issues/photocopies)

  *Note:* you can also view the list of frequencies in **Search Publication Patterns** on the Listbar

  *Tip:* you can type first letter of a frequency and get to that place in the list of 2,600 frequencies, e.g., “m” for monthly “a” for annual - then click arrow down to select

  *Tip:* look at the patterns the University of Hawaii Libraries selected for your title
  
  Link to this site via **UBC Library Staff Pages** (staff + staff) > **Resources** > Serials Division > Subscription Patterns
  
  http://reports.lib.hawaii.edu/cgi-bin/serials/pattern.pl

  **Reminder:** UBC Library standards remain the same from DRA, e.g. v. no.
- Click **Start Prediction**, and enumeration/chronology box will open
- Consult DRA printouts and enter **Enumeration Value**, then **Chronology Value**
  
  *Tip:* use your TAB key to navigate so that you don’t forget to enter a value
- Enter **First Issue’s Expected Date**, or click the ellipsis … to select a date from the calendar
- Enter the same day as above in **The Day of the month Expected** box
  
  *Note:* this date refers to the day you want the issue sent to the Problem List for claiming.
- Click **OK**, and you will return to the Subscription Maintenance box

  ► If you select a publication pattern that has a monthly or daily frequency, but the title is not published every month or every day of the week, you will need to use the **Combine/Omit** feature.
- Click **Combine/Omit** button, which opens the **Combine/Omit Issues** box
- Select those months or days you need to combine or omit.

  *Note:* Checking the combine box for a month/day will combine this month/day and the next month/day (e.g. if you check the July combine box, the July and August issues are combined. Check the omit box for a month/day will omit this month/day.)
  
  You can combine more than two issues or omit more than one issues, but the system doesn’t allow combining and omitting at the same time.
- Click **OK**, and you will return to the Subscription Maintenance box

5. Click the down arrow in **Issue** box to check your work
- view the 52 issues, which are automatically listed, to assure pattern selected was correct.

  ► If issues do not list correctly, you will need to close the pattern and start from the beginning
- To close a pattern, click **Close Pattern** in the **Predictive Component Pattern** tab

6. Check-in Issues: refer to the DRA printouts and list of issues received
- Select **Check-In** > **Serials Check-In** from the Listbar
- Search for title using the assigned Check-In Title
- Select single or multiple issues (Shift key + click mouse), and click **Quick Check-In**

  **Reminder:** in Voyager you only check-in issues you have received, not missing, late, etc.
- To see these checked in issues, click **History**, which will open the **Serials History** box
- click **Holdings …** to see the **call number** of this title
- click **MARC** to see the Cat bib record (which will launch because you signed on to the Cat client)
- click **Maintenance** to get back to the Subscription Maintenance screen
- Check work in OPAC

► If the **unbound and bound locations** of this record are **different**, remove the 2\textsuperscript{nd} indicator from the “Unbound issues” statement (866) of the holdings record, so that it will move to the first line of the **Recent Issues** statement in the OPAC.

► If the **unbound and bound** locations of this record are **the same**, delete the “Unbound issues” statement (866) in the holdings record.

► If the **unbound and bound locations** of this record are **in different buildings**, the Order should be linked to the unbound location. E.g. Centaurus (AER-9428)
  - the unbound location, there should be an note (866) saying where the bound volumes are, and no “Unbound issues are in …” note.
  - the bound location there should be an “Unbound issues in …” note (866), and remove the 2\textsuperscript{nd} indicator, so that it will move to the first line of the **Recent Issues** statement in the OPAC.

*Tip:* to close all Acquisitions windows, click on main Acq button (bottom menu bar) named **Voyager Acquisitions > File > Close All Windows**

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**Note:** There are two way of creating Components: a) from the Purchase Order line item, and b) from Serials Check-In (this approach can only be taken when one or more components have already been created for a serial.)

Creating a Component & assigning a Pattern From Serials Check-In:
(only used when Component Category is Supplementary or Indexes, not Basic)

Search for the serials by the current check-in title.
Click on Edit Pattern, which brings up the Subscription Maintenance
Follow instructions 4 – 6 above.