

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 2nd 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 2nd 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**

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.