

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.

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)
 - **Select record (UBCO titles will have Order Location ACQ/SER Okanagan desk).** Click **Edit**
 - **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 (eg. Journal of Psychiatry - **OK**)
 - Leave **Check-In Title** box checked
 - Leave **Category** as basic
 - 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 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 pattern assigned to the UBCV subscription
 - Search the title in Subscription Maintenance
 - Click **Start Prediction**, and enumeration/chronology box will open
 - Enter **Enumeration Value**, then **Chronology Value**
 - Tip:* use your TAB key to navigate so that you don’t forget to enter a value

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- 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. 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**

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