

Creating a Publication Pattern

To create a publication pattern for automatic prediction, you can use a publication pattern template, or you can specify the enumeration, chronology, frequency, and regularity for the serial title. A set of publication pattern templates is available from Polaris Library Systems. These templates can be used as an aid in serials prediction, but they should be tested by checking the prediction preview. If the publication pattern has changed since these templates were created, the library can update the template. When you create a new publication pattern for a serial title, you can save it as a template.

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Use a template to create a publication pattern

Follow these steps to create a publication pattern for a Serial Holdings record using a publication pattern template.

1. Search for and select the bibliographic record for the serial title, right-click, and select Create, Serial Holdings Record.

Note:

This is only one method for creating a serial holdings record. You can also select **File, New, Serial Holdings Record** from the Polaris Shortcut Bar and then link to the bibliographic record. For other methods of creating a serial holdings record, see [“Create a serial holdings record”](#) on page 27.

A blank Serial Holdings Record workform appears.

Tip:

The bold type indicates information that is required before you can save the record.

2. Enter the required information and save the serial holdings record.
3. Click the Add/Create Pattern icon or press CTRL+SHIFT+N.

The screenshot shows the 'Serial Holdings Record - 145 - General - Polaris' window. The 'Publication Patterns' section is highlighted with a green box. A red circle is drawn around the 'Add/Create Pattern' icon (a square with a plus sign) in the top right corner of the 'Publication Patterns' section. The window also displays a table with columns: Category / Linkage No., Frequency, Designation, Regularity Pattern, Calendar Change, and Pattern.

The Create Publication Pattern - Pattern Options window appears.

Tip:

Use the **Next** and **Back** buttons to navigate the wizard.

4. Click on the Template Name column to sort the titles alphabetically.
5. Click anywhere in the list of templates, and type the first letter of the template's name. The cursor will jump to the template name or close to it so you can find it quickly.

Note:

If you are using Polaris publication templates, some titles are listed under **The** because it is part of the actual title of the serial. *The New Yorker*, *The Atlantic Monthly*, *The Publisher's Weekly* are examples.

6. Select the template.

Note:

If you chose the wrong template, click the **Back** button and make another selection.

7. Click **Next**.

The Enumeration and Chronology page appears, and the **Start designation** is displayed on the bottom of the page. The date in the **Start date** box defaults to the template's start date.

Important:

This is the start date of the template, not your subscription's start date. If your subscription begins after this start date, or the first issue you want to predict is after this date, do not change the start date. If you change the start date for a publication pattern template, you must re-enter the enumeration captions and values. Instead of changing the start date, remove the predicted issues that come before the first issue you want to predict. See step 13.

Create Publication Pattern - Enumeration and Chronology

Pattern
Frequency: Weekly Start date: 1/ 8/2007 End date:

Chronology Setup
Caption: Format: ☐ Alternative chronology

Level No.	Caption	Format	Start Value	Display As...
1	Year	Numeric	2007	2007
2	Day of month	Numeric	08	8
3	Month	Full text	01	January

Enumeration Setup
Caption: Format: Start value: Bib units per next higher level: Continuity: ☐ Alternative enumeration

Level No.	Caption	Format	Units	Continuity	Start Value	Display As...
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Start designation: (January 8 2007)

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8. Check the enumeration and chronology. It is not necessary to change the enumeration and chronology if you want to start your expected issues after the template's start date. Simply remove the issues on the Prediction Results page of the Publication Pattern wizard. See step 13.

Important:

If you change the frequency of the pattern, the regularity is removed and another default regularity (to match the selected frequency) will take its place. Only change the frequency if the pattern template is not at all suitable. If you change the frequency by mistake, click **Cancel** on the last page of the pattern wizard and exit without saving the modified template.

9. Click **Next** to go to the next page of the wizard.

The Regularity Pattern page appears with the publication details.

Create Publication Pattern - Regularity Pattern

Regularity Pattern
Publication code: Calendar unit: From: To: Format 'from' and 'to' fields as follows:

Publication Details

- pd mo
- cw 0298mo/0299mo
- cw 0697mo/0698mo
- cw 0802mo/0803mo
- cw 1298mo/1299mo
- cw 0702mo/0703mo

Year: 1753 - 9999.
Month: 1 - 12.
Season: 21 - 24.
Week of month: 99, 98, 97, 00, 01, 02, 03, 04, 05.
Week of year: 1 - 53.
Day of month: 1 - 31.
Day of week: su, mo, tu, we, th, fr, sa.

Calendar Change
(2- or 4-character numeric codes indicates MM, SS or MMDD. Can be separated by a comma.)

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10. Click Next to go to the next page of the wizard.

The Prediction Results page appears.

Tip:

If the predicted issues do not appear as you expected, click the Back button and make changes. If you click the Cancel button, the Publication Pattern wizard closes and your changes will not be saved.

11. Check the predicted issues and verify that they appear as expected.

Important:

If you used a template with a start date before the actual start of your subscription to this title, there may be issues prior to the issues you want to generate. You need to remove the predicted issues before clicking the Finish button.

12. If you want to see more issues than those displayed in the Prediction Results list, click View More.

The number of issues that appear in the Prediction Results list is the number of issues that will be generated.

Important:

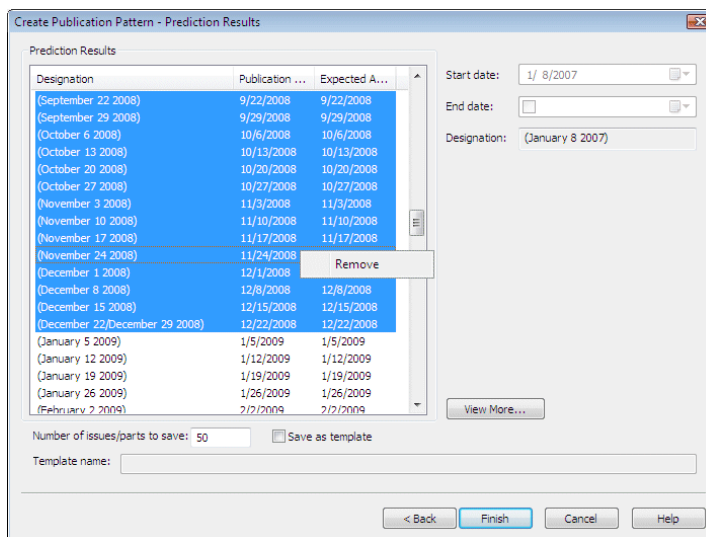
Keep clicking View More until you see the first issue you want to predict.

13. Remove all the predicted issues with dates before your subscription start date by doing the following steps:

- a) Select the issue directly above the first issue you want to generate.
- b) Press CTRL+SHIFT+Home.
- c) Right-click, and select Remove.

Tip:

This procedure only removes issues or parts from the predicted list; the issues or parts listed are not yet records in the Polaris system. When you have generated issues or parts records and you want to remove them, you delete them (see [“Delete single or multiple serial issues/parts”](#) on page 92).



After you remove issues, the Number of issues/parts to save box displays the number of issues remaining.

14. Click Finish to create the expected issues.

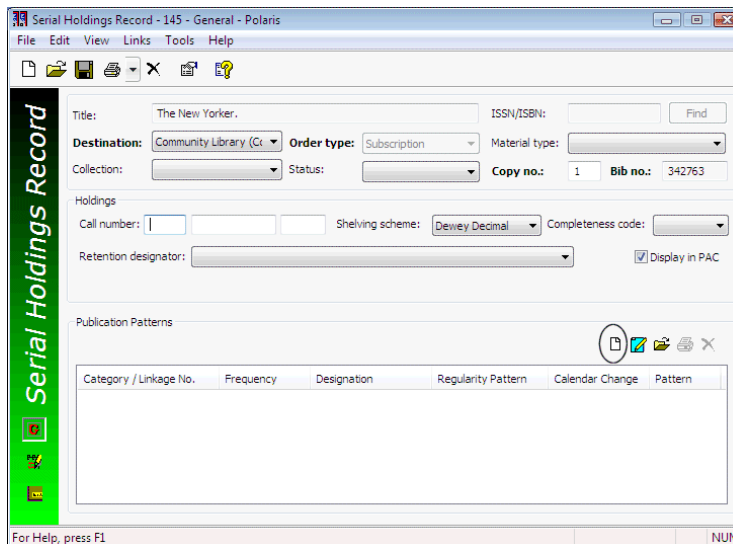
The expected issues appear in the Check In workform. See [“Checking In Serials”](#) on page 79.

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Specify the publication pattern for a serial title

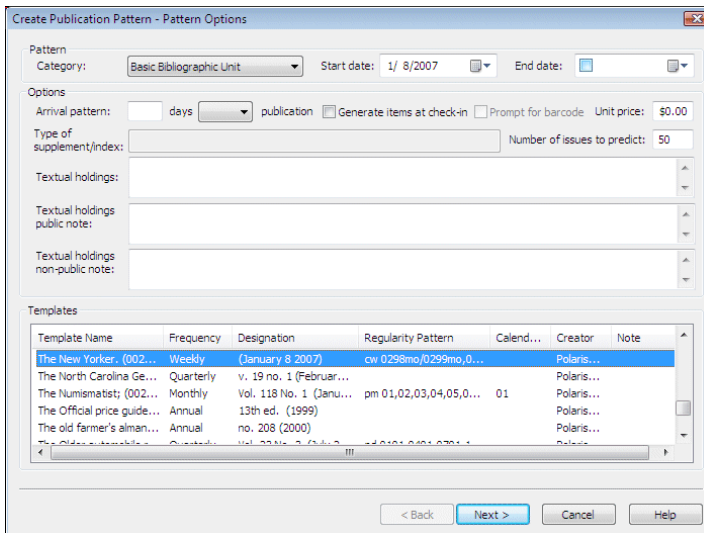
Follow these steps to specify the publication pattern for a serial title.

1. Click  in the Publication Patterns toolbar of the Serial Holdings Record workflow.



The screenshot shows the 'Serial Holdings Record - 145 - General - Polaris' window. The 'Publication Patterns' section is at the bottom, and a red circle highlights the 'Create Publication Pattern' icon (a document with a plus sign) in the toolbar above it. The window also shows fields for Title, Destination, Order type, Material type, Copy no., Bib no., Call number, Shelving scheme, and Retention designer.

The Create Publication Pattern - Pattern Options dialog box appears.



The 'Create Publication Pattern - Pattern Options' dialog box is shown. The 'Category' is set to 'Basic Bibliographic Unit'. The 'Options' section includes 'Arrival pattern' (days), 'Type of supplement/index', and 'Textual holdings'. The 'Templates' section shows a list of templates with columns for Template Name, Frequency, Designation, Regularity Pattern, Calendar Change, and Creator.

Template Name	Frequency	Designation	Regularity Pattern	Calendar Change	Creator	Note
The New Yorker (002...	Weekly	(January 8 2007)	cw 0298mo,0299mo,0...		Polaris...	
The North Carolina Ge...	Quarterly	v. 19 no. 1 (Februar...			Polaris...	
The Numismatist; (002...	Monthly	Vol. 118 No. 1 (Janu...	pm 01,02,03,04,05,0...	01	Polaris...	
The Official price guide...	Annual	13th ed. (1999)			Polaris...	
The old farmer's alman...	Annual	no. 208 (2000)			Polaris...	

2. Select a category in the Category box to indicate that the publication pattern is for the basic bibliographic unit, a supplement, or an index.

Note:

You can have multiple runs for the Basic Bib, Index and/or Supplement with the same or different publication patterns.

Tip:

You can have different publication patterns for different categories of the same serial title. For example, you can indicate a frequency of **Monthly** for the basic bibliographic unit and **Annual** for the supplement.

3. Type or select a date when you want the publication pattern to begin in the **Start date** box.

Note:

The **Start date** is the current date if you are not using a publication pattern template. If you are using a publication pattern template, the **Start date** is the template's start date and should not be changed. See ["Use a template to create a publication pattern"](#) on page 34.

4. If you want to specify a date when you want the publication pattern to end, type or select a date in the **End date** box. An end date is not required.
5. In the **Arrival pattern** boxes, type the number of days and select before or after to indicate the amount of time between the publication date and the date the issue is expected in the library. The arrival pattern is used to calculate the expected arrival date.
6. If you want to prepare the issues of this serial holdings record for circulation as they are received, select the **Generate item records at check-in** box.

Important:

You must create a serial item template before you can create serial items automatically. See ["Create a serial item template"](#) on page 63.

7. If barcodes are applied and should be scanned at check-in, select the **Prompt for barcode on check-in** box.

Note:

The prompt for the barcode also includes a box for the issue unit price if the Serials parameter **Enter unit price at serials check-in** is set to **Yes**. If the parameter is set to **No**, when you check in a serial issue, the cursor goes to the barcode field, and you can scan in the barcode. If the parameter is set to **Yes**, when you check in a serial issue, the cursor goes to the price field. See ["Setting Up the Check In Prompt"](#) in the *Polaris Technical Services Administration Guide 4.1*.

8. If you want the issues and the item records created from the issues to have a price, type the price per issue in the **Unit price** box.
9. If the category type is supplement or index, indicate the type in the **Type of supplement or index** box.
10. Type the number of issues or parts you want to predict in the **Number of issues/parts to predict** box.

Note:

The number of issues or parts that will be predicted also depends on the publication pattern, including the start and end dates. The default (50) is the maximum number of issues or parts that can be predicted.

Tip:

The retention information and public note in the serial holdings record display in the PAC at the branch level. If you have multiple serial holdings records for the same title and branch, but they are retained for different periods based on the collection, use the textual holdings notes to indicate the collection-specific retention.

11. If you want to record and display other holdings information, type the textual holdings in the Textual Holdings box. You can use this box for retrospective holdings information (the physical serial issues/parts your library holds for which there are no records in Polaris). Example: v. 36-49 (1961-1994). Incomplete vols. unbound. Some issues missing.

Note:

The textual holdings and the textual holdings public note display in the public access catalog after the serial holdings record public note, if there is one. The serial holdings record public note is at the branch level. See [“Displaying Serial Titles in the PAC”](#) on page 21.

12. If you want to enter a public note, type it in the Public note box.
13. If you want to enter a note that is displayed for staff only, use the Non-public note box.
14. Click Next, and follow the steps in [“Establish chronology and enumeration”](#) on page 40 and in [“Set up the serial publication pattern regularity”](#) on page 43.

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Establish chronology and enumeration

Follow these steps to establish a serial publication’s chronology and enumeration.

Note:

You can specify up to four levels of chronology, six levels of enumeration, and two levels of alternative enumeration. There must be at least one level of enumeration or chronology.

1. Specify the publication pattern options, following the steps in [“Specify the publication pattern for a serial title”](#) on page 38, and click Next.

The Create Publication Pattern - Enumeration and Chronology dialog box appears.

Tip:

If the frequency is Quarterly, see [“Tips for Predicting Quarterly Issues”](#) on page 46.

2. Select the frequency with which the serial is published in the Frequency box.

Note:

The frequency is specified in the 008 field, position 18 of the bibliographic record.

3. For each level of chronology, enter information in the following fields in the Chronology Setup frame:

Level No.	Caption	Format	Start Value	Display As...

- a) Select the chronology caption in the Caption box.
- b) Select the format in the Format box.
- c) If applicable, select the Alternative chronology box.
- d) Click Add to add the chronology level.
- e) Continue adding chronology levels.

Example:

If the chronology includes a year, month, and day (November 24, 2003), there are three levels of chronology. Select **Year** as the caption and select **Number** as the format for the first level of chronology. Select **Day of Month** as the caption and select **Number** as the format for the second level of chronology. Select **Month** as the caption and select **Full text** as the format for the third level of chronology.

4. For each level of enumeration, enter information in the following fields in the Enumeration Setup frame:

Tip:

To suppress the enumeration display, use square brackets [] in the **Caption** box. To force a value to display in reverse order, use a plus sign + in the **Caption** box under Enumeration Setup. For example: +Ed. with a format of **numeral**, and a start value of 5 would display as 5th Ed.

- a) Type the enumeration caption in the Caption box.
- b) Select the enumeration format in the Format box.

Note:

If you select **Free text** for the enumeration format, you can leave the **Start value** blank. For more information on using free text enumeration to add an issue that is a supplement or a special issue with a different title than the title in the serial holdings record, see [“Predict issues/parts with different titles”](#) on page 53.

- c) Type a start value for the enumeration in the **Start value** box.

Note:

If you select **Number**, **Numeral**, or **Roman** in the **Format** box, enter an Arabic number in the **Start value** box. The number is converted to the appropriate format. For example, if you selected **Numeral** for the format and 5 as the start value, it is converted to **5th**. If you selected **Roman** for the format and 5 as the start value, it is converted to **V**. The start value can be blank if the enumeration format is free-text.

- d) If applicable, select the **Alternative enumeration** box.

- e) Click **Add** to add the enumeration level.

Note:

If the enumeration for the serial has volume and number, the highest (first) level of enumeration is the volume.

The **Bib units per next higher level** and **Continuity** boxes appear for each level of enumeration you define after the first level of enumeration.

5. In the **Bib units per next higher level** box, indicate how many units are needed in each enumeration level (second - sixth) before the next higher level increments.

Examples:

For a monthly serial with enumeration of volume and issue, type 12 in the **Bib units per next higher level** box for the second enumeration level.

After 12 issue records are created for a volume, the first enumeration level is automatically incremented by one.

For a daily publication that is published every day except on Sundays and Christmas Day, it is not necessary to enter the exact number of issues.

Enter 365 in the **Bib units per next higher level** box. Then, select **Day of Month** in the **Calendar Change** box and a value of 0101 to force the volume to increment on January 1 of each year.

6. Indicate in the **Continuity** box if the numbering for each level restarts (returns to 1) or continues incrementing.

Note:

The enumeration and chronology levels and values you specified appear in the **Start designation** box. If the designation is not what you want, you can remove chronology and/or enumeration levels, and reenter the information.

7. Click Next to set up the serial regularity. See [“Set up the serial publication pattern regularity”](#) on page 43.

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Set up the serial publication pattern regularity

If the publication pattern frequency is a common one, and there are no combined or omitted issues, you do not need to specify the regularity to generate the predicted issues. For example, to predict issues for a serial with a **Daily** frequency that is published every day without exception, you do not need to enter the regularity information. If there are days when the serial is not published, you need to specify these exceptions. To predict issues for publications with a frequency of **Totally Irregular** or **Continuously Updated**, you must enter a regularity pattern.

Note:

Some frequencies show the publication details automatically in the **Publication Details** box, whereas other frequencies (such as **Daily**) produce too many entries to show in the box. To check the prediction, click **Next** (see [“Review a publication pattern’s prediction”](#) on page 47).

Follow these steps to specify the publication pattern regularity.

1. Specify the publication’s enumeration and chronology following the instructions in [“Establish chronology and enumeration”](#) on page 40, and click **Next**.

The **Create Publication Pattern - Regularity Pattern** dialog box appears.

Create Publication Pattern - Regularity Pattern

Regularity Pattern
 Publication code: Calendar unit: From: To:

Publication Details

Add
 Remove

Format 'from' and 'to' fields as follows:

Year: 1753 - 9999.
 Month: 1 - 12.
 Season: 21 - 24.
 Week of month: 99, 98, 97, 00, 01, 02, 03, 04, 05.
 Week of year: 1 - 53.
 Day of month: 1 - 31.
 Day of week: su, mo, tu, we, th, fr, sa.

Calendar Change

(2- or 4-character numeric codes indicates MM, SS or MMDD. Can be separated by a comma.)

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2. Select a publication code in the Publication code box.

Note:

There are default regularity patterns when you enter a frequency, but you can enter exceptions to the publication pattern by using **p** for additional issues, **o** for omitted issues, and **c** for combined issues.

3. Select a calendar unit in the Calendar unit box.
4. Type a valid publication value in the From box.

Note:

Day of week (d): mo, tu, we, th, fr, sa, su.
 Day of month (d): 01-31
 Month (m): 01-12
 Season (s): 21 (spring), 22 (summer), 23 (autumn), 24 (winter)
 Week of year (w): 01-53
 Week of month (w): 99 (last), 98 (next to last), 97 (third to last), 00 (every), 01 (first), 02 (second), 03 (third), 04 (fourth), 05 (fifth).
 Year (y): yyyy (four digits)

If you are specifying that one or more issues are combined, you must enter both **From** and **To** values.

5. If applicable, type a valid publication value in the To box.
6. Click **Add** to add the publication details to the list under **Publication Details**.

Example:

A weekly serial is published on Monday of each week with combined issues for the last two weeks of August and December. The Publication Details are as follows for this publication:

pd mo
 cw 0898mo/0899mo
 cw 1298mo/1299mo

Tip:

The **Calendar Change** box is active only if you defined enumeration in the publication pattern.

7. If you need to specify a calendar change, select **Month**, **Day of Month** or **Season** in the **Calendar Change** box, and enter the corresponding two-digit numeric code. If the serial is published less frequently than monthly, you must select **Day of Month** to indicate a calendar change.

Note:

A calendar change indicates the chronological point at which the highest level of enumeration increments or changes. For example, if you select **Day of Month** for the calendar change, and enter **0101**, the calendar change will be on January 1. However, if the serial is not published on January 1, the calendar change automatically takes effect on the next day the serial is published. You can specify more than one calendar change by separating the values with commas.

8. Click **Next**, and review the expected issues to see if the publication pattern results are what you wanted. See [“Review a publication pattern’s prediction”](#) on page 47.

Note:

If you go back to the previous view and change the frequency, the publication pattern details are automatically removed. However, changing other information does not affect the publication details.

Tips for Predicting Quarterly Issues

If the frequency is Quarterly, you can select a chronology caption of Season or Quarter (among other selections). The start date of the quarterly publication determines the chronology of the first issue.

If the chronology caption is set as Season, the Start date determines the season as follows:

- 3/21/YY - 6/20/YY = Spring
- 6/21/YY - 9/20/YY = Summer
- 9/21/YY - 12/20/YY = Autumn
- 12/21/YY - 3/20/YY = Winter

If the chronology caption is set as Quarter, the Start date determines the quarter as follows:

- 1/1/YY - 3/31/YY = 1st Quarter
- 4/1/YY - 6/30/YY = 2nd Quarter
- 7/1/YY - 9/30/YY = 3rd Quarter
- 10/1/YY - 12/31/YY = 4th Quarter

Depending on the initial start date, you can manipulate the chronology to correctly reflect the first issue to be predicted. The following are some examples of quarterly prediction:

- If the first issue is Vol. 14 No. 3 (Autumn 2012), the Start date should be 9/21/12 or later (but not later than 12/20), so that the system will predict a fourth issue as Winter 2012.
- If the first issue is Vol. 17 No. 1 (Winter 2012), the Start date should be 1/1/2012 or later, (but not later than 3/20/2012), so that the system will correctly predict all four issues within the calendar year, starting with Winter. If the start date is 12/21/11, a Winter issue will be produced, but with a chronology year of 2011, not 2012.

Related Information

[“Publication Pattern Examples”](#) on page 61

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Tip:

The Prediction Results dialog box also displays when you select **Tools, Predict Issues/Parts** from the Check In workflow and when you right-click from the Serial Holdings Record.

Review a publication pattern's prediction

Follow these steps to review the publication pattern's prediction results.

1. Set up the serial title's publication pattern. See [“Specify the publication pattern for a serial title”](#) on page 38.
2. After setting up the serial's publication regularity, click Next.

The Create Publication Pattern - Prediction Results window displays the predicted issues using the pattern you set up. The pattern's start and end date display as well as the designation for the first predicted issue.

Designation	Publication ...	Expected A...
March 5 2012	3/5/2012	3/5/2012
(March 12 2012)	3/12/2012	3/12/2012
(March 19 2012)	3/19/2012	3/19/2012
(March 26 2012)	3/26/2012	3/26/2012
(April 2 2012)	4/2/2012	4/2/2012
(April 9 2012)	4/9/2012	4/9/2012
(April 16 2012)	4/16/2012	4/16/2012
(April 23 2012)	4/23/2012	4/23/2012
(April 30 2012)	4/30/2012	4/30/2012
(May 7 2012)	5/7/2012	5/7/2012
(May 14 2012)	5/14/2012	5/14/2012
(May 21 2012)	5/21/2012	5/21/2012
(May 28 2012)	5/28/2012	5/28/2012
(June 4 2012)	6/4/2012	6/4/2012
(June 11/June 18 2012)	6/11/2012	6/11/2012
(June 25 2012)	6/25/2012	6/25/2012
(July 2 2012)	7/2/2012	7/2/2012
(July 9/July 16 2012)	7/9/2012	7/9/2012
(July 23 2012)	7/23/2012	7/23/2012

Start date: 1/ 8/2007
End date:
Designation: (January 8 2007)

Number of issues/parts to save: 50 ☐ Save as template
Template name:

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3. If you want to see more prediction results, click View More.
Additional prediction results appear in the list.

Tip:

If you previously specified an end date, you can extend the publication pattern's end date to predict more issues. See [“Specify the publication pattern for a serial title”](#) on page 38.

4. If you want to save the publication pattern as a template, select the **Save as Template** check box, and type a name for the template in the **Template name** box.
5. Click **Finish** to save the publication pattern.

If you saved the publication pattern as a template, it is available in the list in the Publication Pattern Template Manager. See [“Creating Publication Pattern Templates”](#) on page 55.