

## Some ideas & tips for cancellations from Voyager-L

NOTE: due to the various versions of Voyager different institutions are on, the tips below may not always work with the version CARLI is currently using. The header of the e-mail message is included so you can search Voyager-L to find the full original post.

### Firm orders:

#### **Canceling single line items without canceling the entire PO:**

- **Subject:** FW: [VOYAGER-L]: ACQ--problem on cancelling line item 6.1  
**Date:** 2006-10-24 17:07:00  
**From:** "Linda Orr"  
Select the line, mark as cancelled, then generate cancel. This can be done from the line item details within the Receive/Mark and Problems / Claims tabs or from the PO itself using the navigation buttons at bottom.
- **Subject:** Re: [VOYAGER-L]: Line-item 'Cancellations'.  
**Date:** 2004-03-02 16:39:00  
**From:** Maureen Grant  
We have lots of multiple line item PO records for firm-ordered monos, and set limits of either 20 or 50 line items (depending on the vendor). We find it much more efficient than creating single line item orders. We cancel at the line item level all of the time. If we have prepaid, we wait until the credit is received and posted before canceling the line item. We then create a new PO for the canceled title if we find it available elsewhere. To cancel at the line item level: highlight the line item, and either go into the line item details, or use the recv/mark button at the bottom of the po. Highlight the line in the resulting window, and use the Mark Reason droplist to select cancel. The Mark button will now be active. Click the Mark button, close the record, then go to the problems list to generate the cancellation. I've never had a problem generating a cancellation for a monograph. Now getting serials cancellations to print consistently is another thing entirely...
- [Note from SLN: from other posts on Voyager-L, it appears that canceling a single line item or a PO will cause a cancellation notice to print the next time Acq Reports/Notices are run. Apparently there is no way to not print these notices.]

#### **Canceling one copy of a multi-copy order:**

- **Subject:** [VOYAGER-L]: Acq question - cancelling a copy  
**Date:** 2004-05-20 14:22:00  
**From:** "Jessic Vernacchio-Wilson"  
I tried to do this and it worked ok for me. One copy is showing received and one is showing cancelled. In the OPAC it shows as 1 copy received. I'll share what I did, and maybe that will help. In the purchase order screen select the line item and click details. Go to the receive/mark tab and select the copy that is to be cancelled. Under the mark reason drop down menu, select cancel, then click mark. Then go to your Problems tab select the item then click generate cancel. (be sure to click save after this step) when you check the Copy status screen it should say 1 received and 1 cancelled.

### Subscriptions:

- **Subject:** [VOYAGER-L]: How to stop a subscription - the answers!

**Date:** 2006-12-15 13:44:00

**From:** Paul Shackleton

Dear Colleagues,

Many thanks for your responses on my question about how to cancel subscriptions. Having looked at your methods I can conclude that this is a bit like asking for directions - "...now I wouldn't start from here if I were you..." - in that we need to re-think our work-flow in this area from the beginning. Your main recommendations, and some of my own, are:

- Have only one line item per continuation order.
- Don't copy the order if you have a change of title. Why? Well if you do you cannot edit and/or suppress the holdings in the old order. Our problem, an on-going call with Endeavor, was brought about by staff receiving the line item when making payments. This caused Voyager to view the orders as monographs and they did not roll in FPC. Following advice from the list we copied the orders and components so that we could regain the received partial status allowing the order to roll in future years. However, that meant that the old order showed up in the OPAC holdings stating that a copy had been received on date X. I know this is not going to happen to many of you but it is something to be aware of. Why Voyager allows a continuation line item to be received is beyond my understanding.
- If you have created a new holding for the new order remember to suppress the old MFHD - I have a location called 'Cancelled' that does that.
- If there is a change in vendor - Vendor History tab, change vendor.
- If there is a change in currency you have to create a new order - don't copy as otherwise you have the same currency in the new order. You could choose to ignore the change in currency and simply pay in the invoiced currency, but that may lead to confusion.
- Close the pattern and add notes if you want to maintain the check-in history. You might want to edit the component name to alert users of the change. Stop claims on the component.
- If you are starting a new order add a suffix of some kind to the original order number to maintain the link, then add a new component with notes.
- If you have checked in all issues and paid all invoices on the old order change it to order Complete status. Having worked through all this I have now discovered a solution to the problem of a continuation order that has been received and has a line item copy status of received complete. If you remove the component and then add a new component the line item copy becomes received partial again when you check in the first issue - amazing!

- Subject:** Re: [VOYAGER-L]: cancelled periodicals problems  
**Date:** 2003-03-31 10:56:00  
**From:** "Elaine Donnelly"  
 We are having a similar, but not identical, problem with some of our patterns. In our case we changed vendors, so at the expiration of the vendor X subscription, I copied the old PO with the components relinked to the new PO for vendor Y. I did this so that future issues would be claimed to the correct vendor; for outstanding issues, I added a note to the enum/chron of each issue saying to claim from the old vendor. For patterns that had items already claimed, we now cannot receive or delete those issues, nor can we delete the claims on them. Patterns with outstanding issues that had not been claimed yet have experienced few problems with checking them in. If they were on the problem list, we sometimes have to unmark the issue before receipt is permitted.
- Subject:** Re: [VOYAGER-L]: cancelled periodicals problems  
**Date:** 2003-03-27 09:28:00  
**From:** "Kevin M. Randall"  
 This is something that I definitely consider a bug, although I'm not sure what Endeavor's take is on it: a component pattern MUST be OPEN for the enum & chron data to show up in the Problem and Claim lists. Whenever the component is closed, that data will disappear (although the issues will still be on the lists). To make the data re-appear, simply attach another publication pattern to the component. Make the first issue of the new pattern due at a much later date, so you won't get unnecessary things showing up on the problem list. Then, when all the problems and claims are resolved, you can close the pattern for real. Re "close pattern as of future date": Yes, this does work, but beware of the same situation as above. Anything in the claim and problem lists will show no enum/chron, and you will not be able to add any special issues that might come in.
- Subject:** Re: [VOYAGER-L]: completing purchase orders/invoices  
**Date:** 1999-08-05 13:17:00  
**From:** mh8498a@american.edu  
 ...If a title ceases, cancelling the PO after the last issue is received seems to me to be the best way to handle it. But you can't cancel a PO that has a check-in component. So you have to wait until the remaining issues arrive. Also, you can't invoice/credit a canceled PO so for discontinuations you'll want to wait until the credit memo has been entered before "canceling." For title changes and vendor changes you would want to either cancel the old PO or complete it. Otherwise I don't know how you would distinguish current titles from dead titles.
- Subject:** RE: [VOYAGER-L]: Serials cancellation  
**Date:** 2003-02-12 09:10:00  
**From:** "Cicco, Cindy"  
 ... We edit the component name by adding "Cancelled effective w/v.10". We add what issue the cancellation is effective with so the checkin and payment personnel know exactly when the subscription should stop. That way we only check is what is appropriate and also we make sure we get what we paid for. Sometimes we decide to cancel a subscription before we have received everything we paid for, so we put in the note and then do not close out the component until the last issue has been received.

- **Subject:** [VOYAGER-L]: Serials cancellation

**Date:** 2003-02-11 15:47:00

**From:** "Ginzburg, Barbara J"

Our library has just completed a major serials cancellation project. The last step of the project is to remove the cancelled items from "Serials Check-in" while still maintaining the check in history of the cancelled items. Many of the things that we cancelled are second and third copies of items, so there is still one copy being checked in. We set up each copy on a separate PO. Our serials manager would prefer that the cancelled copies do not show up when he does a check in. This way he does not have to guess at which copy is cancelled and which is not. My inclination is to add "Cancelled" in the component title before the title of the item. If we need to look at the check in history we can pull it up using "Cancelled-title" but it won't show up for check-in.

- **Subject:** Re: [VOYAGER-L]: Ques-cancelled journals

**Date:** 2003-06-20 13:38:00

**From:** Sherrie Kristin

What we do here at Purdue Calumet is: when a title ceases or changes we first go in and make sure that none of the issues have passed their expected date. If they have we change the date to a couple of days after the date we are working on (i.e. if I were doing the work today, the date would be changed to June 23, 2003). Then I make a note stating "ceased," "title changed to...", etc... and "close the component" clicking "yes" for the effective today question. At this juncture I would also go into the history and make sure no issues are displaying in the OPAC, changing any "yes" to "no." We do this because we only keep the last full bound volume in our collection and that is displayed from the Holdings Record. We would then go to the PO and change the Vendor SNA to "0000" this prevents us from automatically paying on and EDI invoice, because it will have to be manually linked. I put a note in the notes area stating the status of the title on the PO. At this point the PO can be changed to "complete." If this is done, a new PO will be needed if the title is reinstated or changes back to the old title.