

Voyager Acquisitions Module Session Defaults, Preferences, and Workflows Configuration

To configure Session Defaults, Preferences, and Workflows in the Voyager Acquisitions Module, select the Tools menu or the appropriate icon in the Toolbar.

NOTE: Examples below assume that the Voyager clients are located on the staff member's C:\ drive. If the Voyager clients on the workstation you are configuring are located on a different drive (the D:\ or E:\ drive for example), substitute the letter of that drive for C:\ in all instances below.

REMINDER: Session Defaults, Preferences and Workflows are operator and PC specific. This means that changes you make will be in effect for your logon at your PC only. If another operator uses his/her own logon at your computer, your settings will not be in effect for that user. Also, if you logon to Voyager using another computer, you will not see the changes you made to Defaults, Preferences and Workflows.

These settings are defaults. Some of these choices may be changed for individual records as you are working. In addition, you can come back into session defaults and preferences at any time and change the settings.



Session Defaults

Purchase Order Tab

The screenshot shows the 'Session Defaults' dialog box with the 'Purchase Order' tab selected. The 'Purchase Order' tab is circled in red. The dialog contains the following fields and controls:

- Order Site: [Dropdown]
- Ship To: [Dropdown]
- Bill To: [Dropdown]
- Vendor Code: [Text] [Lookup Icon]
- Account: [Dropdown]
- Currency: [Dropdown]
- Order Type: [Dropdown]
- Cancel After (days): [Text]
- Claim Interval (days): [Text] Don't Claim
- Ship Via: [Text]
- Clear [Button]
- OK [Button] Cancel [Button] Clear All [Button]

Order Site

Default *order site* location selected here will automatically appear in the *site field* on the header tab of a new purchase order.

Ship To

Default *ship to* location selected here will automatically appear in the *ship to field* on the header tab of a new purchase order.

Bill To

Default *billing location* selected here will automatically appear in the *bill to field* on the header of a new purchase order.

Vendor Code

Default *vendor code* selected here will automatically appear in the *code field* in the vendor section of the header tab of a new purchase order.

If you do not know the code for a particular vendor, click the search button (magnifying glass) to conduct a search for the vendor.

If you know the code for the vendor, enter the code and click on the check mark button to validate the vendor code.

If you have a default order site selected, entry of a default vendor code will automatically trigger any accounts associated with the vendor to be displayed in the *account field drop-down*. In addition, if you've selected a default vendor record for which delivery options have been specified, those values will automatically display in the *cancel after (days)*, *claim interval (days)* and *ship via fields* of the Session Defaults, purchase order tab.

Account

Default vendor *account* selected here will automatically appear in the *account field* in the vendor section of the header tab of a new purchase order.

Currency

Default *currency* code selected here will automatically appear in the *code field* in the currency section of the header tab of a new purchase order.

Order Type

Default *order type* codes selected here will automatically appear in the *type field* in the order section of the header tab of a new purchase order.

Note that when a purchase order is marked as any purchase order type, except for continuation, all line item types default to single part. When a purchase order is marked as continuation, all line item types default to subscription.

Cancel After (days)

Enter the default number of days before you would like to automatically cancel a purchase order if the item(s) has not been received. This number will automatically appear in the *cancel after field* on the footer tab of a new purchase order.

Claim Interval (days)

Enter the default number of days you want between claim notices. This number will automatically appear the *claim interval field* on the footer tab of a new purchase order.

Don't Claim

Checking this box will automatically mark the *don't claim check box* on the footer tab of a new purchase order.

Ship Via

Default shipping method entered here will automatically appear in the *ship via field* on the footer tab of a new purchase order.

Line Item Tab

The screenshot shows a 'Session Defaults' dialog box with the 'Line Item' tab selected. The 'Line Item' tab is circled in red. The dialog contains the following fields and controls:

- Cancel After (days):** A text input field.
- Claim Interval (days):** A text input field.
- Don't Claim:** A checkbox.
- Donor:** A text input field.
- Requestor:** A text input field.
- Reference # Qualifier:** A dropdown menu.
- Buttons:** 'OK', 'Cancel', 'Clear', and 'Clear All'.

Cancel After (days)

Enter the default number of days before you would like to automatically cancel a line item that has not been received. This number will automatically appear in the *cancel after field* on the delivery options tab of a new line item.

Claim Interval (days)

Enter the default number of days you want between claim notices. This number will automatically appear the *claim interval field* on the delivery options tab of a new line item.

Don't Claim

Checking this box will automatically mark the *don't claim* check box on the delivery options tab of a new line item.

Donor

Default *donor* information entered here will automatically appear in the *donor field* on the delivery options tab of a new line item.

Requestor

Default *requestor* information entered here will automatically appear in the *requester field* on the delivery options tab of a new line item.

Note: If the Quick Line Item feature is being used to create a line item, this information will automatically appear in the *requester field* on the quick line item dialog box.

Reference # Qualifier

Default numbers selected here are used for EDI activities. Selected numbers will automatically appear in the *first vendor reference number field* on the type tab of a new line item.

Line Item Copies/Funds Tab

The screenshot shows a software dialog box titled "Session Defaults" with a tab labeled "Line Item Copies/Funds" highlighted in red. The dialog is organized into several sections:

- Reference Fields:** A grid of fields for "Ledger", "Invoice", "Purchase Order", "Vendor", "Line Item", and "Fund". The "Fund" field is circled in red.
- Intended Location:** A dropdown menu labeled "Intended Location:".
- For This Location:** A section containing:
 - "# of Copies:" with a text input field.
 - "Ship To:" with a dropdown menu.
 - "Commit to Fund:" with a dropdown menu.
- Buttons:** "Display Selected Intended locations", "Clear", "OK", "Cancel", and "Clear All".

Intended Location

Default storage location selected here will automatically appear in the *intended location field* on the copies/funds tab of the line item window.

Note: If the Quick Line Item feature is used to create the line item, this information will automatically appear in the *intended location field* on the quick line item dialog box.

For This Location

of Copies:

Default *number of line item copies* to be ordered entered here will automatically appear in the *number of copies field* on the copies/funds tab of the line item window.

Note: If the Quick Line Item feature is used to create the line item, this information will automatically appear in the *number of copies field* on the quick line item dialog box.

Ship To:

Default *ship to* information can be entered here if you would like the items shipped to a location other than the final storage location. Information entered will automatically appear in the *ship to field* on the copies/funds tab of the line item window.

Note: If the Quick Line Item feature is used to create the line item, this information will automatically appear in the *ship to field* on the quick line item dialog box.

Commit to Fund:

Default *commit to fund* information entered here will automatically appear in the *commit to fund* field on the copies/funds tab of the line item window.

Note: If the Quick Line Item feature is used to create the line item, this information will automatically appear in the *commit to fund field* on the quick line item dialog box.

Invoice Tab

The screenshot shows a dialog box titled "Session Defaults" with a tab labeled "Invoice Tab". The "Ledger" dropdown menu is highlighted with a red circle and contains the word "Invoice". Other fields include "Bill To", "Vendor Code", "Account", and "Currency", each with a dropdown arrow. A search button (magnifying glass) is next to the "Vendor Code" field. Buttons for "OK", "Cancel", "Clear", and "Clear All" are at the bottom.

Bill To

Default billing location selected here will automatically appear in the *bill to field* on the header tab of a new invoice.

Vendor Code

Default *vendor code* selected here will automatically appear in the *code field* in the vendor section of the header tab of a new invoice.

If you do not know the code for a particular vendor, click the search button (magnifying glass) to conduct a search for the vendor.

If you know the code for the vendor, enter the code and click on the check mark button to validate the vendor code.

Entry of a default vendor code will automatically trigger any accounts associated with the vendor to be display in the *account field*.

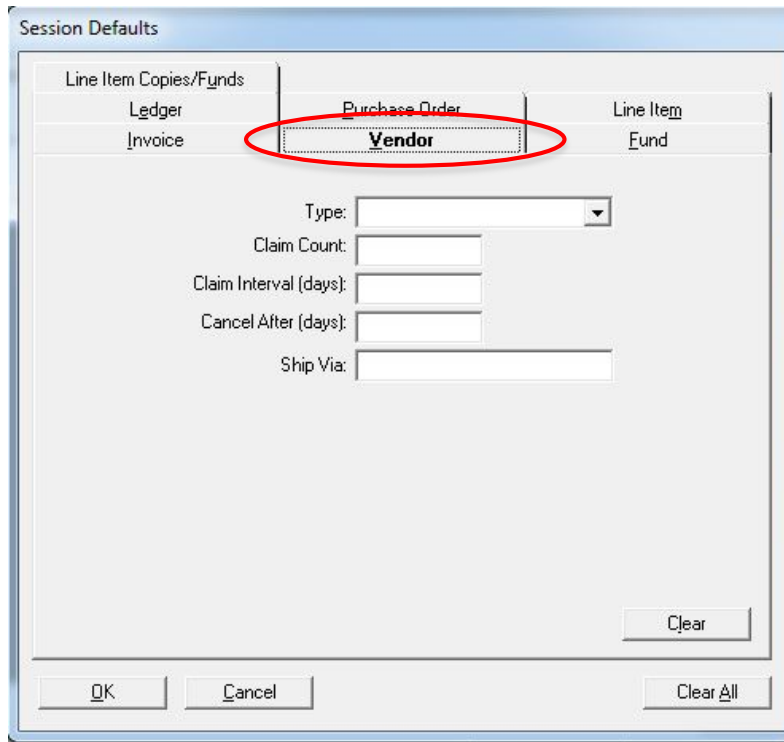
Account

Default vendor *account* selected here will automatically appear in the *account field* in the vendor section of the header tab.

Currency

Default *currency* code selected here will automatically appear in the *code field* in the currency section of the header tab

Vendor Tab



Type

Default vendor *type* selected here will automatically appear in the *vendor type field* in the header information area of a new vendor record.

Claim Count

Default number of claims will automatically appear in the *claim count field* on the delivery options tab of a new vendor record. This will set the maximum number of claims that will be sent to the vendor for line item that has not been received.

Claim Interval (days)

Enter the default number of days you want between claim notices. This number will automatically appear the *claim interval field* on the delivery options tab of a new vendor record.

Cancel After (days)

Enter the default number of days before you would like to automatically cancel a line item that has not been received. This number will automatically appear in the *cancel after field* on the delivery options tab of a new vendor record.

Ship Via

Default shipping method entered here will automatically appear in the *ship via field* on the delivery options tab of a new vendor record.

Fund Tab

The screenshot shows a dialog box titled "Session Defaults" with a "Fund Tab". The dialog is divided into several sections. At the top, there are three tabs: "Line Item Copies/Funds", "Purchase Order", and "Line Item". Below these are two columns of fields: "Ledger" and "Invoice" on the left, and "Purchase Order" and "Vendor" on the right. The "Fund" field is highlighted with a red circle. Below these fields are two main sections: "Commitments" and "Expenditures". Each section has a checkbox for "Over [Type] Allowed", followed by three percentage input fields: "Over [Type] Warning %", "Over [Type] Limit %", and "Under [Type] Report %". Each section also has a "Freeze Date" field with a calendar icon. At the bottom right of the dialog is a "Clear" button, and at the very bottom are "OK", "Cancel", and "Clear All" buttons.

Commitments

Over Commit Allowed:

Checking this box will allow a new fund to be over committed by default.

Over Commit Warning %:

Default *over commit warning percentage* entered here will be automatically entered in the *over commit warning % field* on the override rules tab of a new fund created during your current Acquisitions session. This will override the commitment values of the ledger.

This will trigger an online warning. For example, if you try to approve a purchase order on which the commitment to a fund has surpassed the *over commit warning %*, you will be warned of the over commitment.

Over Commit Limit %:

Default *over commit limit percentage* entered here will be automatically entered in the *over commit limit % field* on the override rules tab of a new fund created during your current Acquisitions session. This will override the commitment values of the ledger.

This will prevent fund from being over committed beyond this percentage.

Under Commit Report:

Default *under expend report percentage* entered here will be automatically entered in the *under commit report % field* on the override rules tab of a new fund created during your current acquisitions session. This will override the commitment values of the ledger.

Freeze Date:

Default *freeze date* entered here will be automatically entered in the *freeze date field* on the override rules tab of a new fund created during your current acquisitions session. This will override the commitment values of the ledger.

This will determine the date on which you want to stop over commitments against the fund.

Expenditures

Over Expend Allowed:

Checking this box will allow a new fund to be over expended by default.

Over Expend Warning %:

Default *over expend warning percentage* entered here will be automatically entered in the *over expend warning % field* on the override rules tab of a new fund created during your current acquisitions session. This will override the expenditure values of the ledger.

This will trigger an online warning. For example, if you attempt to approve an invoice on which the expenditure of a fund has surpassed the *over expend warning %*, you will be warned of the over expenditure.

Over Expend Limit %:

Default *over expend limit percentage* entered here will be automatically entered in the *over expend limit % field* on the override rules tab of a new fund created during your current acquisitions session. This will override the expenditure values of the ledger.

This will prevent fund from being over expended beyond this percentage.

Under Expend Report %:

Default *under expend report percentage* entered here will be automatically entered in the *under expend report % field* on the override rules tab of a new fund created during your current acquisitions session. This will override the expenditure values of the ledger.

Freeze Date:

Default *freeze date* entered here will be automatically entered in the *freeze date field* on the override rules tab of a new fund created during your current acquisitions session. This will override the commitment values of the ledger.

This will determine the date on which you want to stop over expenditures against the fund.

Ledger Tab

The screenshot shows the 'Session Defaults' dialog box with the 'Ledger' tab selected. The 'Ledger' button is circled in red. The dialog contains the following fields and options:

- Commitments:**
 - Over Commit Allowed
 - Over Commit Warning %: []
 - Over Commit Limit %: []
 - Under Commit Report %: []
 - Freeze Date: []
- Expenditures:**
 - Over Expend Allowed
 - Over Expend Warning %: []
 - Over Expend Limit %: []
 - Under Expend Report %: []
 - Freeze Date: []

Buttons at the bottom: OK, Cancel, Clear, Clear All.

Commitments

Over Commit Allowed:

Checking this box will allow fund over commitment to be selected by default when you create a new ledger.

Over Commit Warning %:

Default *over commit warning percentage* entered here will automatically be entered on the commitments/expenditures tab of a new ledger created during your current acquisitions session. A ledger's commitment values will be applied to any of the ledger's funds that do not have their own commitment values specified.

Over Commit Limit %:

Default *over commit limit percentage* entered here will automatically be entered on the commitments/expenditures tab of a new ledger created during your current acquisitions session. A ledger's commitment values will be applied to any of the ledger's funds that do not have their own commitment values specified.

Under Commit Report %:

Default *under commit report percentage* entered here will automatically be entered on the commitments/expenditures tab of a new ledger created during your current acquisitions session. A ledger's commitment values will be applied to any of the ledger's funds that do not have their own commitment values specified.

Freeze Date:

Default *freeze date* entered here will be automatically entered in the commitments/expenditures tab of a new ledger created during your current acquisitions session. A ledger's commitment values will be applied to any of the ledger's funds that do not have their own commitment values specified.

Expenditures

Over Expend Allowed:

Checking this box will allow fund over expenditure to be selected by default when you create a new ledger.

Over Expend Warning %:

Default *over expend warning percentage* entered here will automatically be entered on the commitments/expenditures tab of a new ledger created during your current acquisitions session. A ledger's expenditure values will be applied to any of the ledger's funds that do not have their own expenditure values specified.

Over Expend Limit %:

Default *over expend limit percentage* entered here will automatically be entered on the commitments/expenditures tab of a new ledger created during your current acquisitions session. A ledger's expenditure values will be applied to any of the ledger's funds that do not have their own expenditure values specified.

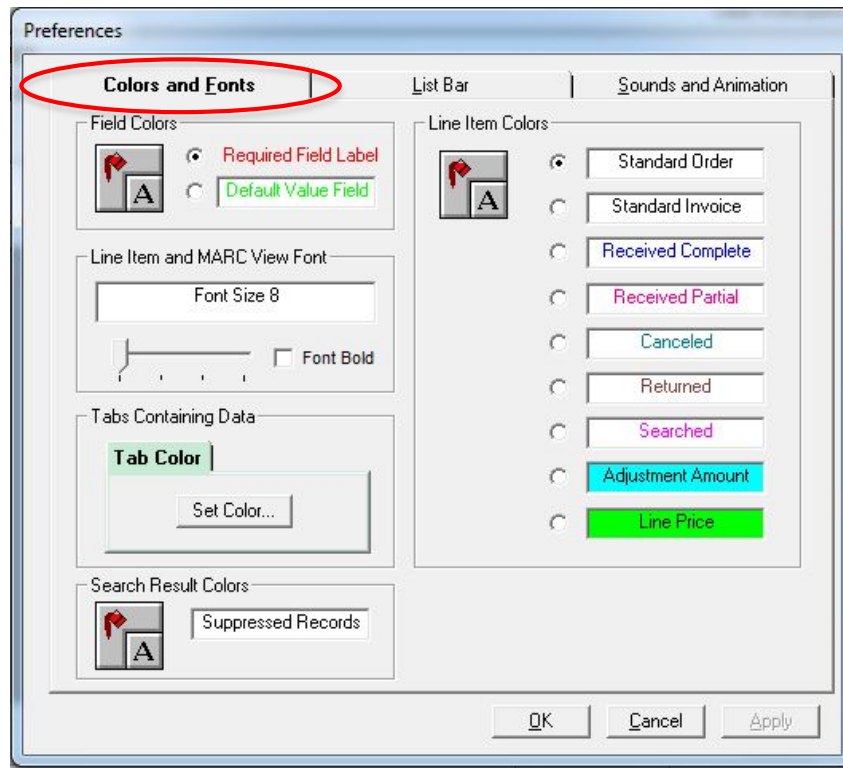
Under Expend Report %:

Default *under expend report percentage* entered here will automatically be entered on the commitments/expenditures tab of a new ledger created during your current acquisitions session. A ledger's expenditure values will be applied to any of the ledger's funds that do not have their own expenditure values specified

Freeze Date:

Default *freeze date* entered here will be automatically entered in the commitments/expenditures tab of a new ledger created during your current acquisitions session. A ledger's expenditure values will be applied to any of the ledger's funds that do not have their own expenditure values specified

Colors and Fonts Tab



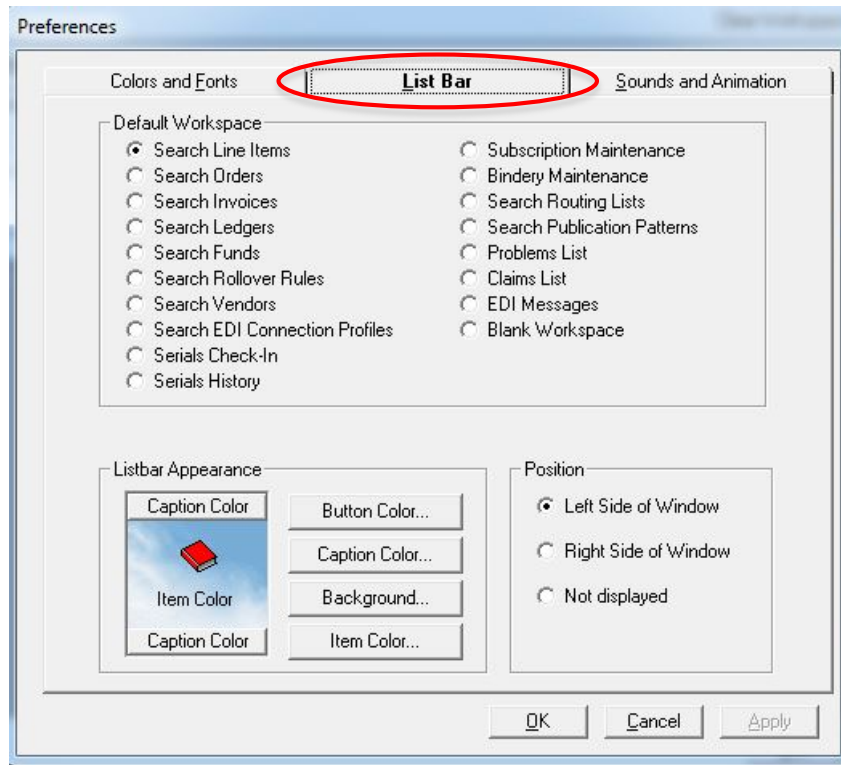
These settings may be changed at the operator’s discretion. Be aware, however, that changes to font sizes may affect your ability to see all of the information in the bibliographic record.

Also, remember that these settings are both logon and PC specific and will not follow the user to another PC, nor will they apply to a different logon on the same PC.

Search Result Colors

Editing this setting will allow the operator to select the font color and background color of suppressed records that show up in their search result lists.

List Bar



Default Workspace

Default workspace selected here will be the window that will automatically display on the main acquisitions window each time you start a new acquisitions session.

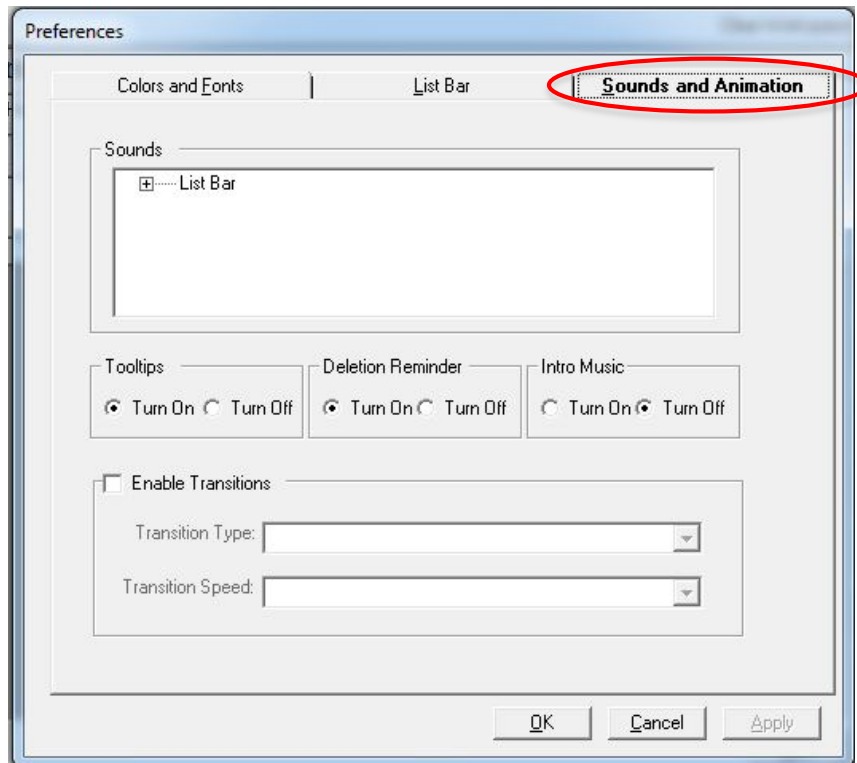
List Bar Appearance

Default color and background selections can be changed at the operator's discretion.

Position

Default *position* of the list bar selected here will position the list bar on either the left or right side of the window. You may also choose to not display the list bar. All functions available via the list bar are also available via the menus.

Sounds and Animation Tab



Sounds

Default *sounds* selected here controls the sounds that are made when a tab or a button beneath a tab on the list bar is selected.

Selections made in "Group Select" control the sound that occurs when you click the tabs in the list bar. Selections made in "List Select" control the sound that occurs when you click a button beneath one of the tabs in the list bar.

Tooltips

"Turn on" *tooltips* will cause a piece of text describing the item's function to display beneath an item on the tool bar when the mouse is held over the item.

Deletion Reminder

"Turn on" *deletion reminder* will cause a confirmation message to display before a record is deleted. This may be used to prevent accidental deletions.

Intro Music

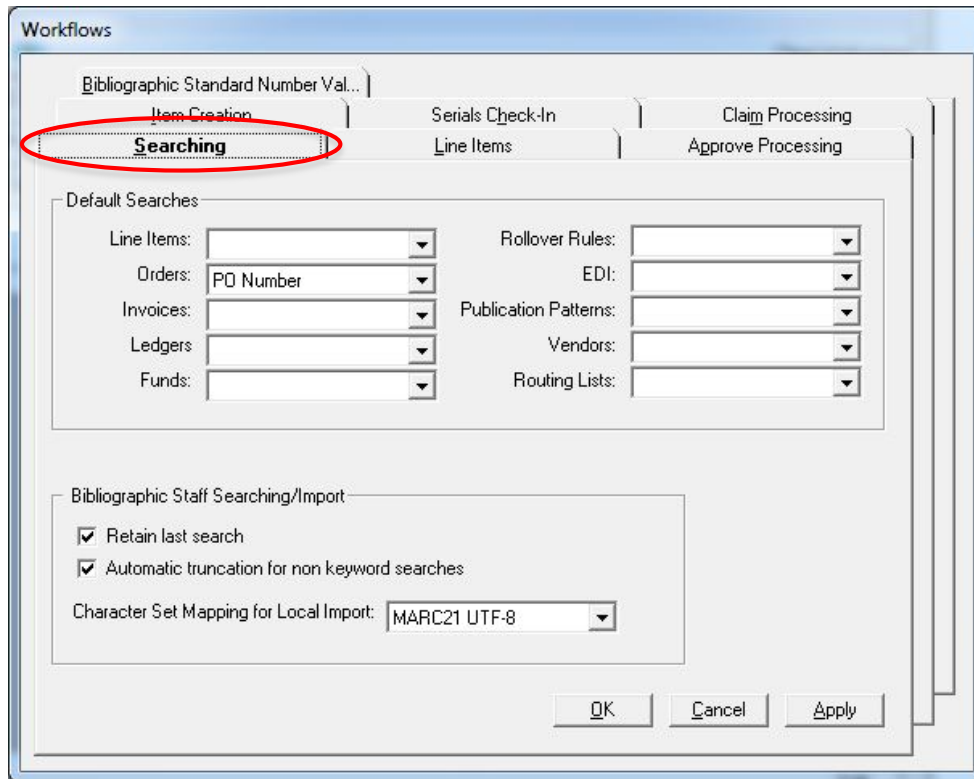
"Turn on" *intro music* will cause a short piece of intro music to sound each time you start a new acquisitions session.

Enable Transitions

Selections made in *enable transitions* determine the "transition type" and "transition speed" used each time a new function replaces the current function in the main acquisitions window.



Searching Tab



Default Searches

Default searches entered here will automatically appear as the *search by option* when the corresponding quick search is performed. The drop-down menus in each of the fields contain all of the available *search by options* for the specific quick search type.

Bibliographic Staff Searching/Import

Retain Last Search:

Select this box and your previous search will remain on the search screen the next time you open the search window. Previous search is retained as long as your session remains active.

Automatic Truncation for Non Keyword Searches:

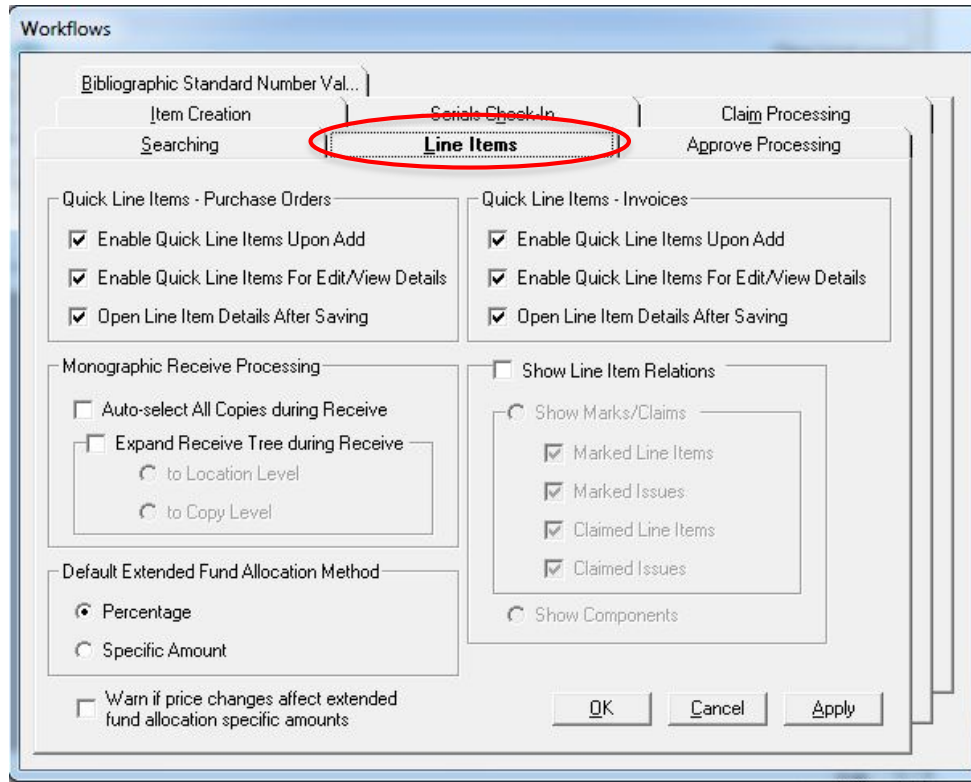
Select this box to automatically apply a truncation symbol to the end of any non-keyword search statement.

Character Set Mapping for Import:

Use the Import drop-down menu to select the appropriate character set of the incoming records when manually importing records online. These records could be from the Universal Catalog, exported from OCLC, etc. It may be necessary to change this setting depending on the source and character set of the incoming records.

Most I-Share libraries set their OCLC Export format option to be Unicode, and then set the preference value above to be "MARC21 UTF-8" which is also Unicode. When the format of the incoming record is Unicode and this preference value is set to MARC21 UTF-8, the operator should not receive any error messages

Line Items Tab



Quick Line Items – Purchase Orders

Enable Quick Line Items Upon Add:

Select *enable quick line items upon add* to automatically have the quick line item window display after adding a line item to a purchase order.

Enable Quick Line Items for Edit/View Details:

Select *enable quick line items for edit/view details* to automatically have the quick line item feature available when a purchase order is opened for editing or viewing.

Open Line Item Details After Saving:

Select *open line item details after saving* to automatically have the check box of the same name on the quick line item window automatically selected. This will cause the detailed view of the line item to automatically display after the line item has been created using the quick line item feature.

Quick Line Items – Invoices

Enable Quick Line Items Upon Add:

Select *enable quick line items upon add* to automatically have the quick line item window display after adding a line item to an invoice.

Enable Quick Line Items For Edit/View Details:

Select *enable quick line items for edit/view details* to automatically have the quick line item feature available when an invoice is opened for editing or viewing.

Open Line Item Details After Saving:

Select *open line item details after saving* to automatically have the check box of the same name on the quick line item window automatically selected. This will cause the detailed view of the line item to automatically display after the line item has been created using the quick line item feature.

Monographic Receive Processing

Auto-select All Copies During Receive:

Select *auto-select all copies during receive* to automatically have all copies for all locations for all selected line items automatically marked to be received when the receive button is clicked on an order or an invoice.

Expand Receive Tree During Receive:

Select *expand receive tree during receive* to automatically have the receive tree (or the line item information hierarchy) expand to a particular level of information when the receive button is clicked on an order or an invoice. When selected, you must then choose whether to expand the receive tree to either the location level or the copy level.

Show Line Item Relations

Select *show line item relations* to automatically have the line items on purchase orders and invoices show additional marks/claims or components information. You must then choose to either “show marks/claims” or “show components.” You cannot choose to display both.

If you choose to “show marks/claims,” you will then be able to choose the kinds of mark and claim information that you want displayed. A benefit of having this information displayed is that marks and claims associated with line items can then be processed right from the purchase order or invoice.

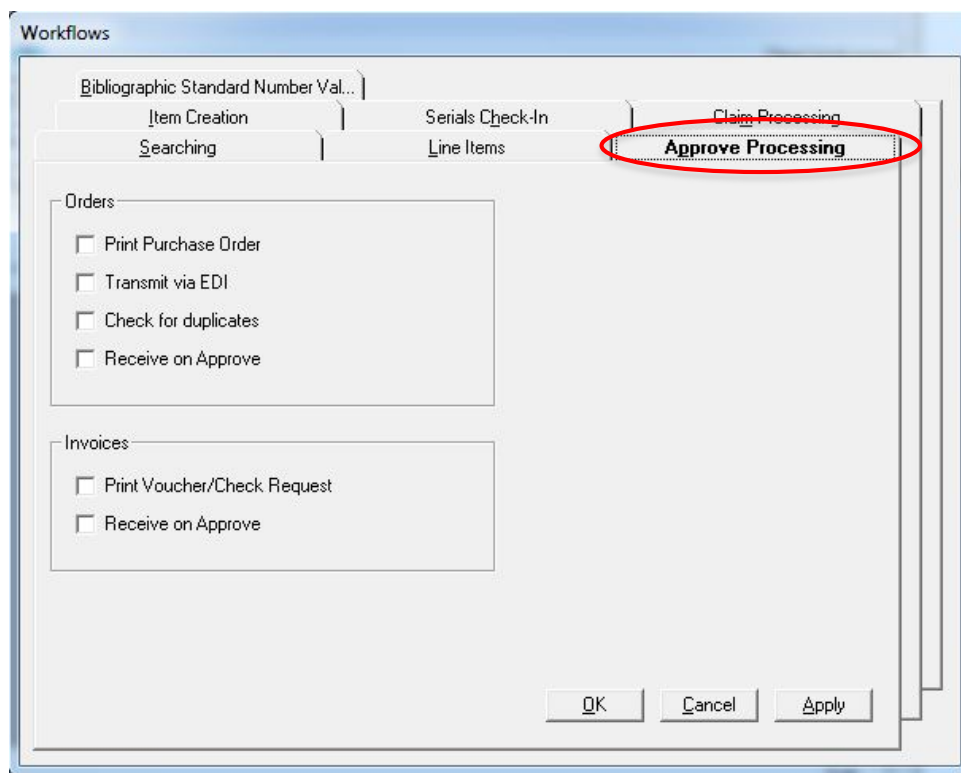
Default Extended Fund Allocation Method

Select *Percentage* to default to Extended Fund Allocations by percentage of the price.

Select *Specific Amount* to default to Extended Fund Allocations by specific amount (Voyager will determine percentage for you).

Warn if price changes affect extended fund allocation specific amounts checking this box will cause a pop-up to appear when a price change alters the specific amounts you have applied to each fund.

Approve Processing Tab



Orders

Check boxes selected in *orders* will automatically be selected on the approve order window when you approve a purchase order.

Print Purchase Order:

Select *print purchase order* to automatically have a copy of the purchase order printed when the purchase order is approved.

Transmit Via EDI:

Select *transmit via EDI* to automatically have a copy of the purchase order transmitted via EDI when the purchase order is approved.

Note that this selection will only be available the location in the *order site field* and the vendor in the *vendor code field* match the library location and vendor of an existing EDI connection profile.

Check for Duplicates:

Select *check for duplicates* to automatically have the system check for duplicate titles for the same location when a purchase order is approved.

Receive on Approve:

Select *receive on approve* to automatically receive all monograph line items on a purchase order when the purchase order is approved.

Invoices

Check boxes selected in *invoices* will automatically be selected on the approve invoice window that displays before you approve an invoice.

Print Voucher/Check Request:

Select *print voucher/check request* to automatically print a voucher/check request when you approve an invoice.

Receive on Approve:

Select *receive on approve* to automatically receive all monograph line items on an invoice when the invoice is approved.

Item Creation Tab

The screenshot shows a software window titled "Workflows" with several tabs. The "Item Creation" tab is selected and highlighted with a red circle. The "Item Records" section contains the following options:

- First Copy Numbered As: 0 (Zero) 1 (One)
- Default Item Status: [Dropdown menu]
- Use list price from the order line item

The "Item Creation from Order" section contains:

- Automatically create at Receive
- Show Item Record on Create
- Sequence new Items at top

The "Item Creation from Invoice" section contains:

- Automatically create at Receive
- Show Item Record on Create
- Sequence new Items at top

The "Item Creation from Serials Check-In" section contains:

- Show Item Record on Create
- Sequence new Items at top

The "Self Check" section contains:

- Magnetic Media
- Sensitize

At the bottom, there is a checkbox for "Check for duplicate Item barcodes" and three buttons: "OK", "Cancel", and "Apply".

Item Records

First Copy Numbered As:

Default *first copy number* selected here will automatically appear in the *copy field* when an item record is created for the first copy of an item. *The default Copy number should match the default number chosen for your migration (which was "1" for most I-Share libraries).*

Default Status:

Default status selected here will automatically appear on an item record when it is created through acquisitions.

Use List Price From the Order Line Item:

Select *use list price from the order line item* to automatically have the line item list price from the approved purchase order display in the *price field* on a created item record. If not selected, the list price would not be part of the item record unless manually entered.

Item Creation From Order

Automatically Create at Receive:

Select *automatically create at receive* to automatically have an item record created when a line item is received from a purchase order.

Show Item Record on Create:

Select *show item record on create* to automatically have the item record display when it is created. This check box will be available only if the *automatically create at receive check box* is selected.

Sequence New Items at Top:

Select *sequence new items at top* to automatically have newly created item records placed at the top of the item sequence in the staff modules. If not selected, by default, the item record is placed at the bottom of the item sequence in the staff modules.

Item Creation From Invoice

Automatically Create at Receive:

Select *automatically create at receive* to automatically have an item record created when a line item is received from an invoice.

Show Item Record on Create:

Select *show item record on create* to automatically have the item record display when it is created. This check box will be available only if the *automatically create at receive check box* is selected.

Sequence New Items at Top:

Select *sequence new items at top* to automatically have newly created item records placed at the top of the item sequence in the staff modules. If not selected, by default, the item record is placed at the bottom of the item sequence in the staff modules.

Item Creation From Serials Check-in

Show Item Record on Create:

Select *show item record on create* to automatically have the item record display when it is created. This feature will not be available in serials check-in unless you have selected the *create item check box* on the component details tab of the component.

Sequence New Items at Top:

Select *sequence new items at top* to automatically have newly created item records placed at the top of the item sequence in the staff modules. If not selected, by default, the item record is placed at the bottom of the item sequence in the staff modules.

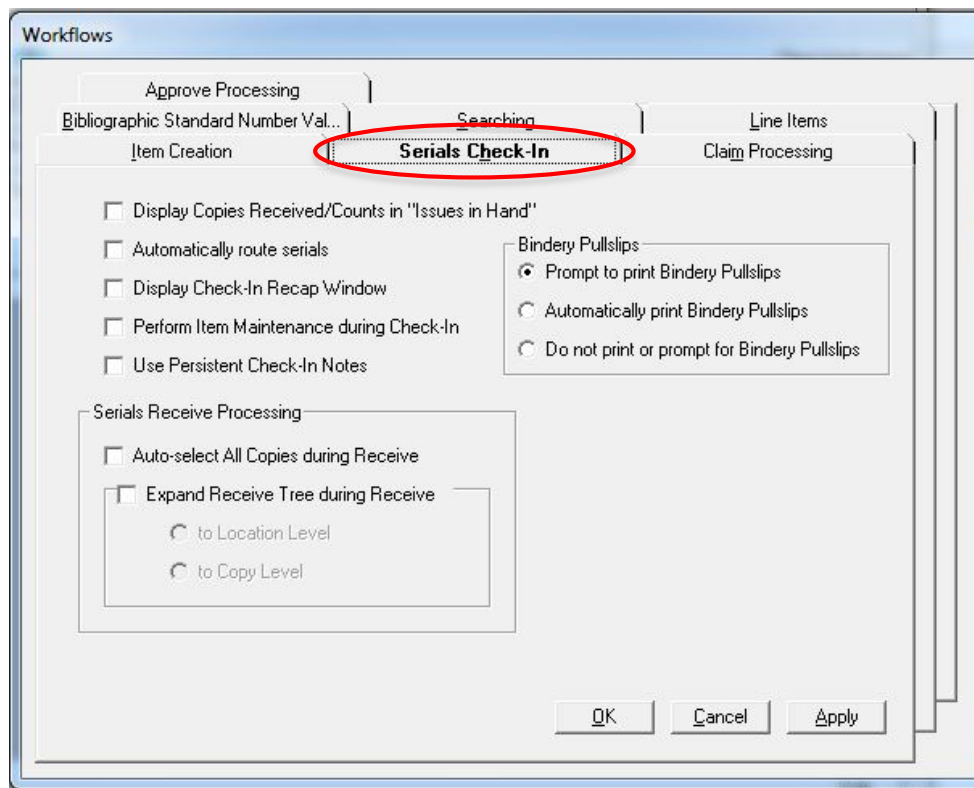
Self Check

The Magnetic Media and Sensitize check box options set item record level flags for interfacing with third-party self-check machines for item check in, check out, and renewal transactions. These are used for magnetic media and sensitize alerts.

Check for Duplicate Item Barcodes

Select *check for duplicate item barcodes* to automatically have the system determine whether a barcode that you are assigning to an item record is currently associated with another item. This is a recommended workflow.

Serials Check-In Tab



Display Copies Received/Counts in "Issues in Hand"

Select *display copies received/counts in "issues in hand"* to automatically see the number of copies that have been received for each issue listed in the "issues in hand" list.

Automatically Route Serials

Select *automatically route serials* to automatically have the next unused routing list printed. The route serial issue window will not display when an issue is received.

Display Check-In Recap Window

Select *display check-in recap window* to automatically have a recap window display after receiving an issue. This window summarizes what happened in the receiving process and includes: the issue that was received, the next expected issue, the ability to change the date for the next expected issue, etc.

Perform Item Maintenance During Check-In

Select *perform item maintenance during check-in* to be able to perform item maintenance before continuing to a check-in recap or receive/mark screen when receiving serials. After you perform your item maintenance, you can then continue the check-in process by clicking the continue button

Use Persistent Check-In Notes

Select *use persistent check-in notes* to have check-in notes appear on the screen throughout the check-in process and automatically close when you click the start over button. If this is not selected, you must manually close the check-in note before you will be able to continue the check in process.

Bindery Pullslips

Select one of these options for printing (or not) of Bindery Pullslips through Bindery Maintenance.

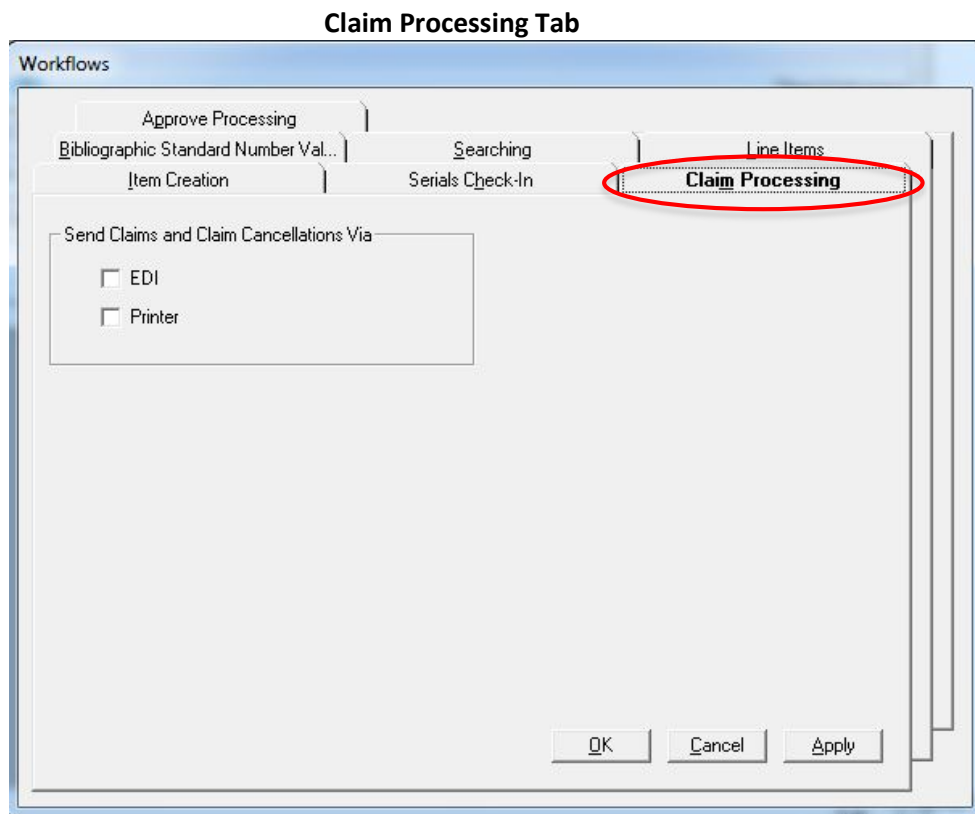
Serials Receive Processing

Auto-select All Copies During Receive:

Select *auto-select all copies during receive* to automatically have all copies for all locations for the selected component marked received when you perform the receive function. If this is not selected, you would need to select each copy for each location to receive all copies of an issue.

Expand Receive Tree During Receive

Select *expand receive tree during receive* to automatically have the receive tree (or item information hierarchy) expanded to a particular level of information when perform the receive function. If selected, you will then need to specify whether you want the receive tree expanded to the location level or the copy level.



Send Claims and Claim Cancellations Via

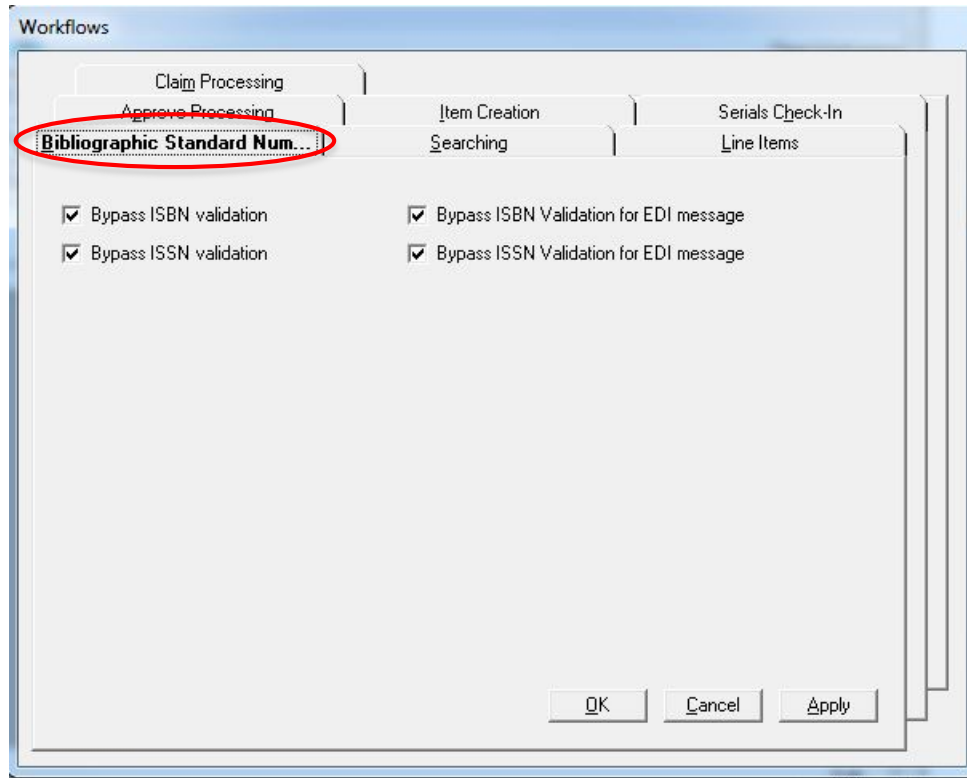
EDI:

Select *EDI* to automatically have the EDI check box selected on the generate claim window that displays when you generate a claim from the claims list. Note that this selection will only be available if the vendor specified in the claim and the location from which you have generated the claim match the vendor and library location of an existing EDI connection profile.

Printer:

Select *printer* to automatically have the printer check box selected on the generate claim window that displays when you generate a claim from the claims list.

Bibliographic Standard Number Tab



The **Bibliographic Standard Number Validation** tab allows you to select options to turn on or off the validation of fields containing ISBNs and ISSNs. These boxes are checked by default, and validation will not occur unless unchecked. Note: validation refers to the format not the actual data.