Voyager Acquisitions & Serials Module:
Summary of Options for Monographs (Firm Orders)

Navigation within Voyager Acquisitions:

You can get to specific functions via:
- the **Listbar** (at left of screen by default)
- the *View* or *File* **Menus** at the top of the client
- **Keyboard shortcuts** are also available for most Listbar and Menu selections. See "Acquisitions Keyboard Equivalents" on the CARLI Web site (http://www.carli.illinois.edu/mem-prod/I-Share/secure/acq/Acq_Keybd_Equivs.pdf).

Purchase Order Creation:

POs can be created from:
- **Listbar:** *Orders → New Purchase Order*.
- **Menus:**
  - *File --> New --> Purchase Order...* OR
  - *View--> Orders --> New Order*

Bibliographic Line Items can be added to a PO via:

Buttons at the bottom of the PO:
- **Add line (Bib. Search):** Imports bib. from your local catalog (or other I-SHARE databases if "Remote" option used on search). Will create a new bib. & holding record in your local catalog if not using a record already in your local catalog.
- **Add line (Bib. Import):** Imports bib. from a local save file of records previously downloaded from OCLC. Will create a new bib. & holding record in your local catalog.
- **Add line (Template):** Creates a bib. from the contents of template workform. Will create a new bib. & holding record in your local catalog.

From PO Menu: Line Item → Add →
- **New...** (Same as "Add line (Template)," above)
- **By Bib ID...** (works like "Add line (Bib. Search)," above, but allows you to search by Voyager Bib ID number)
- **Bib Search...** (Same as "Add line (Bib. Search)," above)
- **Bib Import ...** (Same as "Add line (Bib. Import)," above)

PO line item information (no. of copies to order, price, fund, etc.) can be added to each line item via *either of these two methods:**

- **Quick Line Item**
- **Detailed Line Item**
  - *Note: Detailed Line Item must be used when:*
    - Using Extended Fund Allocation (*Copies/Funds* tab → *Add* or *Edit* → *Extended Fund Allocation* button):
      - When ordering a single copy where its cost will be split between more than one fund
      - When ordering multiple copies of the same item where each copy will be paid for out of a different fund
    - If discounts or shipping/handling costs are to be entered at the Line Item level (*Price* tab) instead of in the Purchase Order Header.

PO discounts & shipping or processing charges can be added *in either (or both):*

- At the **Line Item** level (*Detailed Line Item* button → *Price* tab)
- For the **entire PO** (In PO Header, look for *Amounts* box; click [...] button next to *Other Charges*)

Receiving:

You can receive Line Items via *any* of the following methods:

- **Via Purchase Orders:**
    - **To receive a Line Item on an Approved Purchase Order**, highlight the line item to be received and either:
        - Click *Recv/Mark* button at the bottom of the PO
        - Click *Detailed Line Item* button at bottom of PO, then go to *Receive/Mark* tab.
    - **To receive all the items on a PO at the time the PO is Approved:** Click the checkbox "Receive on Approve" when approving the PO. (This is useful for Approval Plans, where you are creating the PO with the items already in hand.)

- **Via Invoices:**
    - **To receive a Line Item at the time you add the Line Item to an Invoice:** Click the *Append/Receive* button to add line item to the invoice and receive it at the same time.
    - **To receive all the items on an invoice at the time the Invoice is Approved:** click the checkbox *Receive on Approve* when approving the Invoice.

Invoicing:

You can **create invoices** by *either*:

- **Creating a new invoice "from scratch"** then adding line items to it via the *Add Line From Order* function.* To create a new, blank invoice, use *either*:
    - **Listbar:** *Invoices* → *New Invoice*
    - **Menus:**
        - *File --> New --> Invoice...* OR
        - *View--> Invoices --> New*

- **Creating the invoice from the Purchase Order** (Open PO; from menu in PO, *Order* → *Create Invoice*). This will create an Invoice that includes all of the line items that were on the original PO. You can then delete line items from the Invoice that aren't needed, and/or add line items via *Add Line From Order*.*

    * Add Line From Order functions can be accessed from either the *Add Line From Order* button on the bottom left hand side of invoice, or the Menu in Invoice: *Line Item* → *Add Line From Order*

Invoice Line item information (no. of copies received, price, Invoice Piece Identifier in Notes, etc.) can be added to each line item via *either of these two methods:**

- **Quick Line Item**
- **Detailed Line Item**
  - *Detailed Line Item <u>must</u> be used when:*
    - o Using Extended Fund Allocation (*Copies/Funds* tab → *Add* or *Edit* → *Extended Fund Allocation* button):
      - ▪ When invoicing a single copy where its cost will be split between more than one fund
      - ▪ When invoicing multiple copies of the same item where each copy will be paid for out of a different fund
    - o If discounts or shipping/handling costs are to be entered at the Line Item level (*Price* tab) instead of in the Invoice Header.

Invoice discounts & shipping or processing charges can be added *in either (or both):*
- At the **Line Item** level (*Detailed Line Item* button → *Price* tab)
- For the **entire PO** (In PO Header, look for *Amounts* box; click [...] button next to *Other Charges*)

Marking items to send them to the Problems List:

Can be done from *any* of these places:

- **In the Purchase Order:** Highlight the line item and *either:*
  - o Click the *Recv/Mark* button at the bottom of the PO
  - o Click the *Detailed Line Item* button at the bottom of the PO, then select the *Receive/Mark* tab.

- **In the Invoice:** Highlight the line item and *either:*
  - o Click the *Recv/Mark* button at the bottom of the Invoice *(note: once an invoice has been Approved, the only option for marking here is the generation of a Return notice)*
  - o Click the *Detailed Line Item* button at the bottom of the Invoice, then select the *Receive/Mark* tab.

- From results of a **Line Item Search** (Listbar → Line Items → Search Line Items). Opens the *Detailed Line Item* from its PO. From there, click on the *Receive/Mark* tab.

Generating a claim, cancellation notice, or return notice for a line item currently on the Problems list:

Can be done from *any* of these places:

- **In the Purchase Order:** Highlight the line item and click the *Detailed Line Item* button at the bottom of the PO, then click on the *Problems* tab.

- **In the Invoice:** Highlight the line item and click the *Detailed Line Item* button at the bottom of the Invoice, then click on the *Problems* tab.

- From results of a **Line Item Search** (Listbar → Line Items → Search Line Items): Opens the *Detailed Line Item* from its PO. From there, click on the *Problems* tab.

- **From Order Maintenance:** select the *Problems* icon from the Listbar. Click on *Marked Line Items* tab so it is on top (if it isn't already). Search for the line item via various criteria then highlight the

desired line item. Click the button for the desired action at the bottom of the screen (*Generate Claim, Generate Cancel, Generate Return*).

Generating or updating a claim for a line item currently on the Claims list:

Can be done from *any* of these places:

- **In the Purchase Order:** Highlight the line item and click the *Detailed Line Item* button at the bottom of the PO, then select the *Claims* tab.

- **In the Invoice:** Highlight the line item and click the *Detailed Line Item* button at the bottom of the Invoice, then select the *Claims* tab.

- From results of a **Line Item Search** (Listbar → Line Items → Search Line Items): Opens the *Detailed Line Item* from its PO. From there, click on the *Claims* tab.

- **From Order Maintenance:** select the *Claims* icon from the Listbar. Click on *Claimed Line Items* tab so it is on top (if it isn't already). Search for the line item via various criteria then highlight the desired line item. Click the button for the desired action at the bottom of the screen (*Generate Claim, Update Claim*).