Voyager Acquisitions & Serials Module:
Summary of Options for Serials

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, fund, etc.) can be added to each line item via *either of these two methods.* ***Note: for all serials line items, leave the Price as $0.00.***

- **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 later be split between more than one fund
    - When ordering multiple copies of the same item where each copy will later be paid for out of a different fund

Creating Check-in Components:

- The **first** component for a title *must* be created from the Purchase Order to link the Line Item on the PO to the Serials Check-in Component. Highlight the line item in the PO, click the *Detailed Line Item* button at the bottom of the PO, click on the *Type* tab, then click the *Subscription Pattern* button.

- **Subsequent** components are created through Subscription Maintenance, which can be accessed from *any* of the following:
  - Listbar: Check-In → Subscription Maintenance, search for the title
  - Check-in Screen for the title: Click *Maintenance* button at bottom of screen.
  - Serials History screen for the title: Click *Maintenance* button at top right of screen.

Receiving:

All receiving for PO types of Continuation is done through Serials Check-in. (Do not use any of the receiving methods for POs or Invoices that are used for Firm Orders.)

To receive an issue through Serials Check-in, use *either* of these two methods:
- **Quick Check-in** button: to receive all copies on order
- **Accept...** button: to receive copies one at a time. Click in the red box next to the issue to be received (expand via "+" if necessary to see specific copies) and click the *Receive* button.

Adding, deleting, or modifying issues in an existing checkin pattern:

Prior to the issue being checked in, this can be done in *either:*
- **Serials Check-in**
- **Serials Maintenance**

  Note: Serials Maintenance is the only place where you can change the expected date of issues

After the issue has been checked in, you can modify issue information (but not the receipt date) on the *Receipt History* tab under **Serials History**.

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:
  - *Add Line From Order* button on the bottom left hand side of invoice
  - 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**

  **Note: Detailed Line Item* *must* *be used when:*
  - 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
  - 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 an issue to send it to the Problems List:

Unlike monographs, this can be done only in one place, from **Serials Check-in:** highlight the issue to be marked and click the *Accept...* button. Click in the red box next to the issue, select the *Mark Reason* from the dropdown menu (the only option will be *Claim*) and click the *Mark* button.

Generating a claim for an issue currently on the Problems list:

Can be done from *either* of these places:

- **From Serials History:** Click on the *Problem History* tab. Highlight the issue to be claimed and click the *Generate Claim* button.

- **From Order Maintenance:** select the *Problems* icon from the Listbar. Click on *Marked Issues* tab so it is on top. Search for the issue via various criteria then highlight the desired issue. Click the *Generate Claim* button at the bottom of the screen.

Generating, updating or canceling a claim for an issue currently on the Claims list:

Can be done from *either* of these places:

- **From Serials History:** Click on the *Claims History* tab. Highlight the desired issue and click the *Generate Claim, Update Claim* or *Cancel Claim* button at the bottom of the screen.

- **From Order Maintenance:** select the *Claims* icon from the Listbar. Click on *Claimed Issues* tab so it is on top. Search for the line item via various criteria then highlight the desired issue. Click the *Generate Claim, Update Claim* or *Cancel Claim* button at the bottom of the screen.