Monographic Claiming in Voyager Acquisitions

Overview of Claiming Monographs in Voyager

There are two ways to claim monographs in Voyager:

- ACQ1. Claiming is initiated by a standard Voyager batch process called ACQ1 which scans the database and identifies items which should have been received, but were not, based on decisions you make regarding claim intervals and claim counts. The CARLI Office executes the ACQ1 batch process upon request and on a schedule you determine. The process works for monographs and serials.
- Manually. Claims can be generated from a variety of locations within the Acquisitions module, independent of the established claim intervals and claim counts.

How does it work? In general,

- ACQ1 runs and marks items for your review based on the claim interval and claim count criteria
- Marked items appear on the Problems List
- From the Problems List, staff review the marked items and determine whether to Claim or Unmark
- Claimed items appear on the Claims List
- Claim notices are printed through the Voyager Reporter Client or sent via EDI

Getting started

Required
- Have your I-Share liaison submit the WRO (Work Request Online) requesting ACQ1. You will need to specify the schedule you would like ACQ1 to run, for example, Monday morning. (The Voyager documentation was written for an individual library, not a consortium. In the consortial environment, CARLI runs the ACQ1 batch process.)
- Profile staff to "Process Claims from Acquisitions" within SysAdmin
- Printing claim notices requires the Voyager Reporter Client be installed. (For more information see the *Voyager Reporter User's Guide*.) In order for the Voyager Reporter Client to operate, MS Access must be installed on your machine but not be currently open whenever you are running Reporter.

If you are using EDI, EDI claims are sent as a file (and not printed) and require your library has set up EDI with your vendors, as applicable.

Recommended
- Set Workflows for Line Items to "Show Marks/Claims" (*Workflows* → *Line Items* → Check "Show Line item Relations" → Select "Show Marks/Claims")
- Set Workflows for Claim Processing to "Send Claim & Claim Cancellations" via EDI or the printer, as appropriate.

Monographic Claim Intervals

There are four locations to enter Claim Intervals for monographs within Voyager. Does it matter where you enter the claim interval information? Yes! ACQ1 looks for the claim interval in a hierarchical order, beginning with Level One, and accepts the first claim interval it finds.

- Level One: Purchase Order Line Item in Acquisitions
  Orders → Search Orders → Highlight Line Item → Details → Delivery Options
  This works for a single item on the purchase order.

- Level Two: Purchase Order Footer in Acquisitions
  Orders → Search Orders → Footer Tab
  This works for all items on the purchase order.

- Level Three: Vendor Record in Acquisitions
  Vendor → Search Vendors → Delivery Options
  This applies to all items on all purchase orders for a particular vendor. These values will be filled in on the footer of your purchase order if you do not select different defaults or enter different information when creating your PO.

- Level Four: Vendor Policy in System Administration
 *SysAdmin →Acquisitions → Policy Definitions → Vendor Policies*
  This applies to all items on all purchase orders for all vendors defined as a particular vendor type. In the following example, any supplier defined as Vendor Type "Agent" (within the Vendor Record) will have a claim interval of 30 days.

Not Claiming

There may be situations where claiming is not appropriate or desirable. "Don't Claim" limits can be applied, and no items will be marked for claiming in the following situations:

- "Don't Claim" is checked at the Purchase Order Line Item Level.
  Orders → Search Orders → Highlight Line Item → Details → Delivery Options
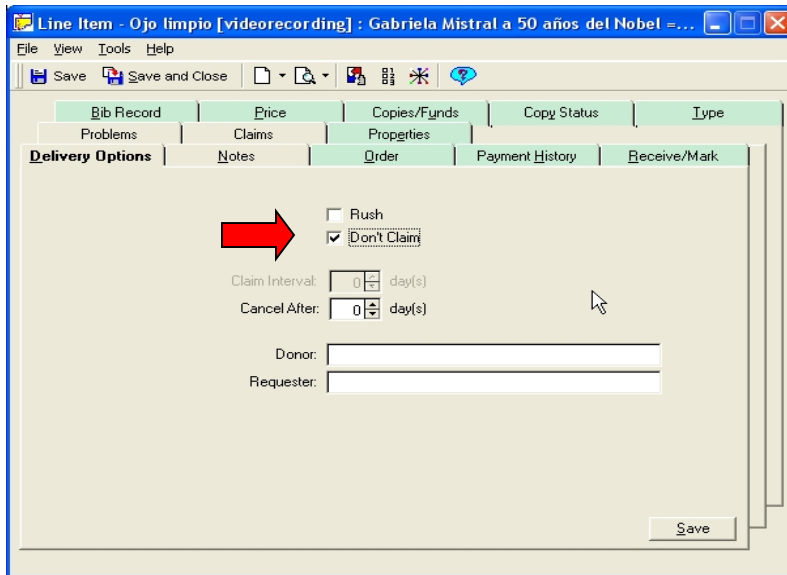
- **Important:** *If no claim intervals are defined within the Purchase Order Line Item Delivery Options, the Purchase Order Footer, the Vendor Delivery Options, or the System Administration Vendor Policies, no items will be marked for claiming. Additionally, if ACQ1 is not being run for your library, no monographic items will be marked for claiming.*

Processing Claims

Claims can be processed within a variety of areas of the Acquisitions module. Procedures are described in detail in the *Voyager 9.1 Acquisitions User's Guide*.

- Within *Orders*
  Generating a Claim from the Problems Tab, pages 6-81, 11-31
  Updating a Claim, pages 11-34
  Generating a Claim from Claims Tab, page 6-84, 11-31
  Generating a Claim from an Approved Purchase Order, page 11-32

- Within *Invoice*
  Processing Marked & Claimed Items from Approved Invoice, pages 12-36, 11-27

- Within *Order Maintenance*
  Problems Screen Overview, page 11-11
  Generating Claims, page 11-32
  Claiming Overview, page 11-10
  Searching for Claims, page 2-104
  Updating Claims, page 11-34
  Canceling Claims, page 11-36