Overview

There are three ways to claim serials 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.
- System applied. Voyager will identify a Skipped Copy (periodical issue) without running ACQ1.
- 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,

- 1. ACQ1 runs and marks items for your review based on the claim interval and claim count criteria,
- 2. Marked items appear on the Problems List,
- 3. From the Problems List, staff review the marked items and determine whether to Claim or Unmark,
- 4. Claimed items appear on the Claims List,
- 5. 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.
- 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.

Serial Claim Intervals

Claiming for serials is similar to monographs, but there are some differences. One difference is that while monographic purchase orders must be approved, serials purchase orders can be approved or pending. Another difference is that there are five locations to enter claim intervals. For the *first* serial claim, ACQ1 checks the Expected Date and Claim Interval located within Subscription Maintenance. In the following example, the *first* claim will be generated 30 days after February 2, that is, on March 4 ACQ1 will mark the item for claiming.

Expected Date of the issue within Subscription Maintenance
 Check-In → Serials Check-In → Search for title → Check-In → Maintenance → Predictive Component
 Pattern

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Line Items	Subscription Maintenance	
Orders		
Invoices		
Ledgers and Funds		
Vendors	Title: Michigan history	
Uneck-In		
	Urder Number: 1904 [] Vendor: [Paxon Company	
	Vendor Title #: 579586	
Serials Check-In	Contract Marking Marking	Marine 1
	Component: Michigan history.	New
Serials History	Component Details Predictive Component Pattern Non-Predictive Component Pattern Routing	Lists
s=b		
	Publication Pattern Model: Bimonthly-v.,no.,yr.,mo.(combined)	
Subscription		
Maintenance		
MA		
	Issue: v. 8/, no. 1 (Jan-Feb 2003)	Don't Claim Issue
Bindery Main	Expected On: 2/5/2003 Change Date	
	Add Issue Change Issue Remove Issue Close Pattern	
Search Bouting Lists		
Order Maintenance		
EDI		Start <u>O</u> ver
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• Claim Interval of the Component within Subscription Maintenance Check-In → Serials Check-In → Search for title → Check-In → Maintenance → Component Details

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Line Items Orders Invoices Ledgers and Funds Vendors Check-In Serials Check-In	Subscription Maintenance Title: Michigan history. Order Number: 304 Vendor: Faxon Company. Vendor Title #: 573596 Component. Michigan history.	 	
Serials History	Component Details Predictive Component Pattern Non-Predictive Component	Pattern Routing Lists	
Subscription Maintenance	Component Name: Michigan history.	Check-In Title 🔽	
Bindery Maintenance	Note: 6/14/04 - Cancelled - FY04 Periodical Review		
	Create Items 🔽 Default Item Type: Serial 1D local requ	uest 💌	
Search Routing Lists	Don't Claim 🦵 Claim Interval (days): 30 🖨 📃	Save Delete	
Order Maintenance EDI		Start <u>O</u> ver	
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For *subsequent* serial claims, ACQ1 follows the same hierarchy utilized in monographic claims: 1) Line Item, 2) Purchase Order, and 3) Vendor Record within Acquisitions, and 4) Vendor Policy within System Administration. It is a very flexible system since it allows the claim interval to be very general--applying to all items on all purchase orders of a particular vendor type, or very specific--applying to only a single line item.

• Purchase Order Line Item in Acquisitions

Orders \rightarrow *Search Orders* \rightarrow Highlight Line Item \rightarrow *Details* \rightarrow *Delivery Options* This works for a single item on the purchase order.

ট Line Item - Rain man [videorecording] /	United Artists P	ictures, Inc. ; a	Guber	
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Bib Record	Price	Copies/F <u>u</u> nds	Copy Status		
Problems <u>Delivery Options</u>	Claims Notes	Prop <u>e</u> rties Order Pa	ayment <u>H</u> istory	Receive/Mark	
	Claim Interval: 3 Cancel After: 1 Donor: 2 Requester: 1	Rush Don't Claim D⊕ day(s) D⊕ day(s)		Save	

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

🔁 Purchase Order:	4185 - [Approved/Se	nt] on 3/19/2004	ŧ			
<u>File</u> Order Line Item	<u>T</u> ools <u>H</u> elp					
📗 🖶 S <u>a</u> ve 🛛 🚰 Sa <u>v</u> e a	nd Close 🏾 🌈 Quick Line II	em OFF 🏾 🏶 Base C	urrency	1 - 🕰 - 🗶 🖥	5 B 💥 💎	
Header Footer N	otes Prop <u>e</u> rties <u>V</u> end	lor History Relate	d <u>I</u> nvoices	1		
Instructions		Amount	-			
Ship V	ía:	Line	Item Subtotal	\$50.88		
Not Needed Aff	er:	C	Ither Charges	\$0.00		
		Total (Order Amount	\$50.88		
🗖 Bush	Cancel After: 🛛 🗘 d	ays				
🗖 Don't Claim	Claim Interval: 90 🔹 d	ays				
Line #/Status	Title	Price (Adjustments)	# of Copies	Location	Fund	Lin
1 / Approved	Fried green tomatoes (video	\$16.96	1	DVD	FY05 / B 81 FY04	L .
2 / Approved	Rain man [videorecording]	\$16.96	1	DVD	FY05 / B 81 FY04	
3 / Approved	Steel magnolias (videoreco	\$16.96	1	DVD	FY05 / B 81 FY04	
<						>
Becv/Mark	nmark Generate Clai <u>m</u>	Update Claim	Generate C <u>a</u> ncel	Generate Re <u>t</u> urn	<u>D</u> etails	<u>M</u> ARC

• Vendor Record in Acquisitions

Vendor \rightarrow Search Vendors \rightarrow 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.

🔍 Vendor - CRICHOVID	
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📗 🗃 Save 沿 Save and Close 🛛 Save and New 📄 🖿 📐 🗸 🛛 🛂 🔡 💥 🥨	
Vendor Code: CRICHOVID Vendor Name: CRITICS CHOICE VIDEO	
Vendor Type: Vendor Vendor Vendor Vendor Type: Vendor Vend	
Currency: USD V Institution ID:	
Addresses/Phones Accounts Delivery Ontions Bank Information Notes Performance Properties	
	1
Claim Count: 3	
Claim Interval (days): 90	
Cancel After (days):	
Shin Via:	

• Vendor Policy in System Administration

SysAdmin \rightarrow Acquisitions \rightarrow Policy Definitions \rightarrow 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.

Voyager System Administration	on Acquisitions/Se	erials Group Definitions 🛛
Select Policy Locations Vendor	Policies	
Vendor Types		
Agent Bookstore	Default Order Type:	Firm Order 💌
Other Publisher Society	Discount %:	
Vendor	Claim Interval:	30 days
	Claim Count:	3
	Cancel Interval:	999 days
	Ship Via:	
	OK Cancel	Apply Help

• **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.

Claim Counts

Claim Count defines the number of times an item should be claimed and can be entered in two locations. Like Claim Intervals, ACQ1 checks locations in a specific order. Once the claim count is met, items will no longer be marked for claiming.

• Level One: Vendor Delivery Options in Acquisitions Vendors → Search Vendors → Delivery Options

📕 Vendor - CRICHOVID	
<u> Eile V</u> endor <u>I</u> ools <u>H</u> elp	
📔 Save 🏰 Save and Close 🙀 Save and New 🗋 🕇 🗟 🗸 🔀 👪 🔆 💷	
Vendor Code: CRICHOVID Vendor Name: CRITICS CHOICE VIDEO	_
Vendor Type: Vendor Vendor Vendor Vendor I vendor V	_
Currency: USD Institution ID:	
Addresses/Phones Accounts Delivery Options Bank Information Notes Performance Properties	
Claim Interval (days): 190	
Ship Via:	

Level Two: Vendor Policy in System Administration
 SysAdmin → Acquisitions → Policy Definition → Vendor Policies

Voyager System Administration	on 😔 Acquisitions/Serials Group Definitions 🔀
Voyager System Administration Select Policy Locations Vendor Vendor Types Agent Bookstore Other Publisher Society Vendor	Policies Policies Default Order Type: Firm Order Discount %: Claim Interval: 30 days Claim Count: 3 Cancel Interval: 999 days
	Ship Via:
	OK Cancel <u>A</u> pply Help

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 Line Item Level.
 Orders → Search Orders → Highlight Line Item → Details → Delivery Options

📴 Line Item - Ojo limp	io [videorecording	g] : Gabriela Mis	tral a 50 años del	Nobel = 🗖 🗖 🔀
<u>Fi</u> le ⊻iew <u>T</u> ools <u>H</u> elp				
📗 🖶 Save - 🎦 Save and 🤇	Close 🗋 🕶 🖧 🕶	🖪 H 米 🔇	>	
<u>B</u> ib Record	Price	Copies/F <u>u</u> nds	Copy Status	Lype
Problems	Claims	Prop <u>e</u> rties	[
Delivery Options	<u>N</u> otes	<u>O</u> rder	Payment <u>H</u> istory	<u>R</u> eceive/Mark
	Claim Intervat. Cancel After: Donor: Requester:	Rush Don't Claim 0 ⊕ day(s) 0 ⊕ day(s)	↓	_
				Save

• "Don't Claim" is checked within the Component Details. This will block claims on all issues of an individual a serial title.

Check-In \rightarrow *Serials Check-In* \rightarrow *Search for title* \rightarrow *Check-In* \rightarrow *Maintenance* \rightarrow *Component Details*

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Line Items	Subscription Maintenance	
Orders		
Invoices		
Ledgers and Funds		
Vendors		
Lheck-In	Title: Luisine at nome.	
	Order Number: 4192 Vendor: EBSCO Subscription Services	
Serials Check-In	Vendor Title #:	
	Component: Cuisine at home.	New
Serials History	Component Details Predictive Component Pattern Non-Predictive Component Pattern Routing	Lists
i	Component Name: Cuisine at home. Check-In Title 🔽	-
Subscription Maintenance	Category: Basic	
K	Note:	·
Bindery Maintenance		
	Create Items 🔽 Default Item Type: Serial non-circulating	
Search Routing Lists	Don't Claim V [days]: 0 - Save Delete	1
Order Maintenance		
EDI		Start Over
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• "Don't Claim" is checked within the Predictive Component Pattern. This will block claims on a single serial issue.

Check-In \rightarrow *Serials Check-In* \rightarrow *Search for title* \rightarrow *Check-In* \rightarrow *Maintenance* \rightarrow *Predictive Component Pattern*



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 Check-In

Generating a Claim from the Problem History Tab, pages 9-51, 11-31 Generating a Claim from the Claims History Tab, pages 9-49, 11-34 Updating a Claim from the Claims History Tab, pages 9-49, 11-34 Canceling a Claim from the Claims History Tab, pages 9-50, 11-36

• Within Order Maintenance

Problems Screen Overview, page 11-11 Generating Claims, page 11-32 Claiming Overview, page 11-10 Searching for Claims, page 2-107 Updating Claims, page 11-34 Canceling Claims, page 11-36