Serials Claiming in Voyager Acquisitions

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 $\rightarrow$ Line Items* $\rightarrow$ Check "Show Line item Relations" $\rightarrow$ 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*
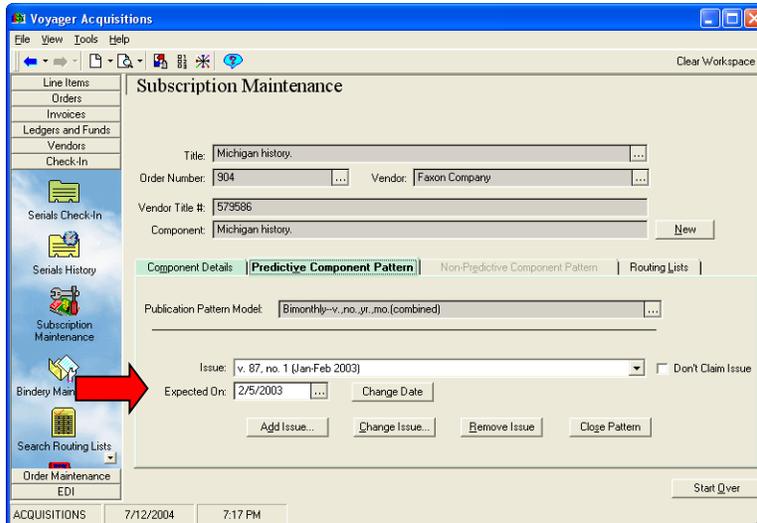
- Claim Interval of the Component within Subscription Maintenance
 *Check-In → Serials Check-In → Search for title → Check-In → Maintenance → Component Details*
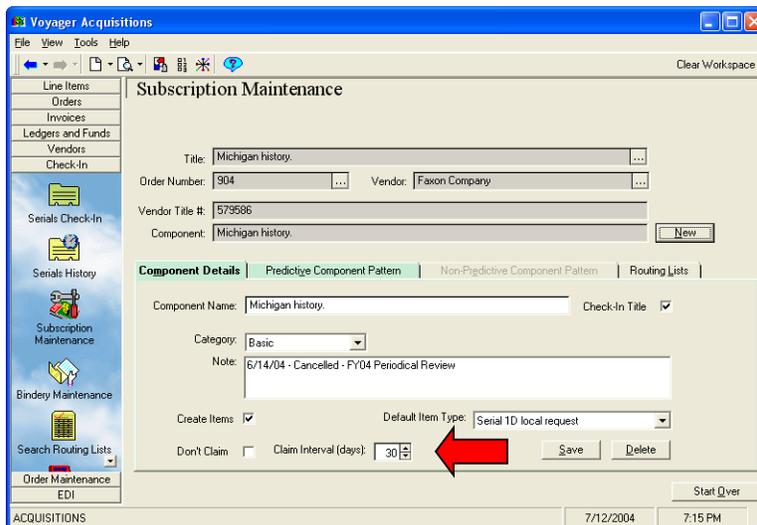
For *subsequent* serial claims, ACQ1 follows the same hierarchy utilized in monographic claims: 1) Line Item, 2) Purchase Order, and 3) Vendor Record within Acquisitions, and 4) Vendor Policy within System Administration. It is a very flexible system since it allows the claim interval to be very general--applying 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 → Search Orders → Highlight Line Item → Details → Delivery Options
 This works for a single item on the purchase order.
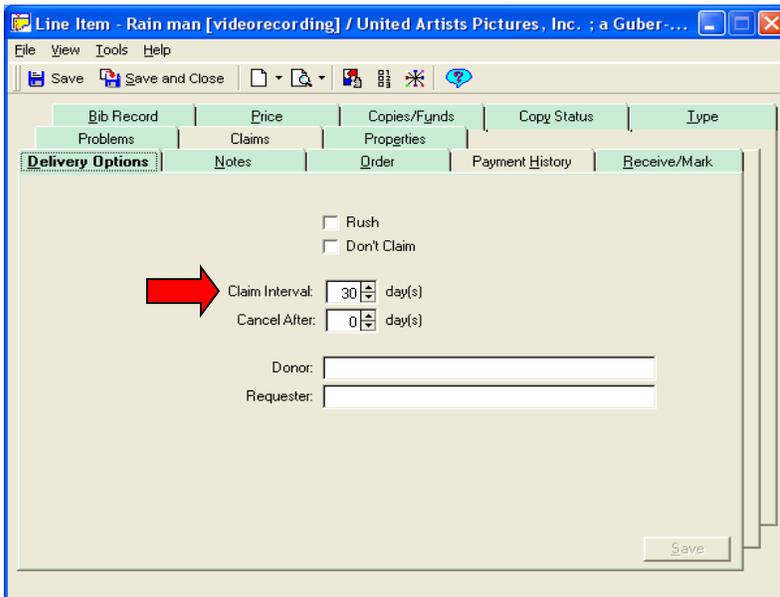
- Purchase Order Footer in Acquisitions
  Orders → Search Orders → Footer Tab
 This works for all items on the purchase order.
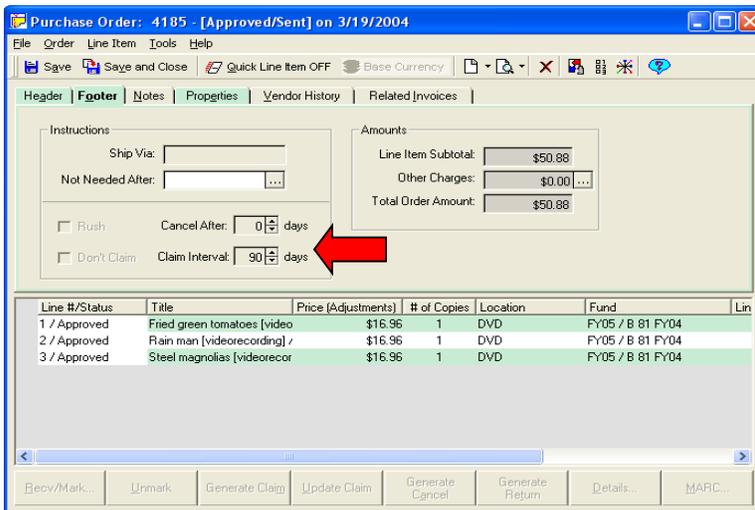
- Vendor Record in Acquisitions
  Vendor → Search Vendors → Delivery Options
  This applies to all items on all purchase orders for a particular vendor. These values will be filled in on the footer of your purchase order if you do not select different defaults or enter different information when creating your PO.
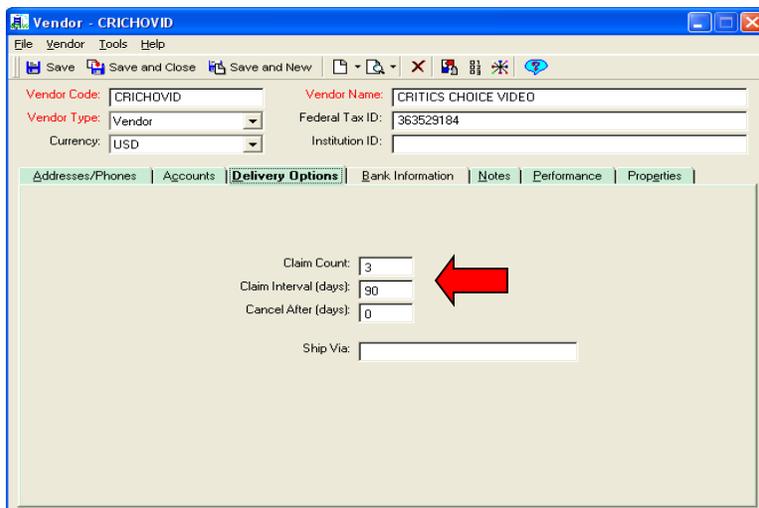
- Vendor Policy in System Administration
  SysAdmin → Acquisitions → Policy Definitions → Vendor Policies
  This applies to all items on all purchase orders for all vendors defined as a particular vendor type. In the following example, any supplier defined as Vendor Type "Agent" (within the Vendor Record) will have a claim interval of 30 days.
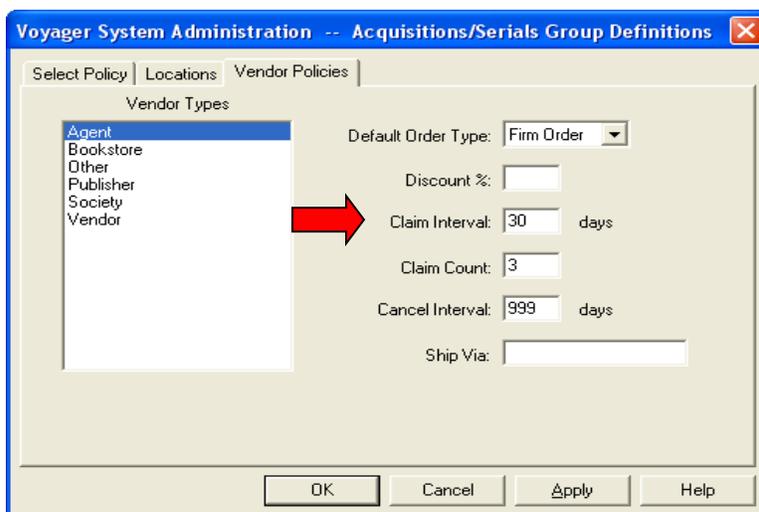

- **Important:** *If no claim intervals are defined within the Purchase Order Line Item Delivery Options, the Purchase Order Footer, the Vendor Delivery Options, or the System Administration Vendor Policies, no items will be marked for claiming.*
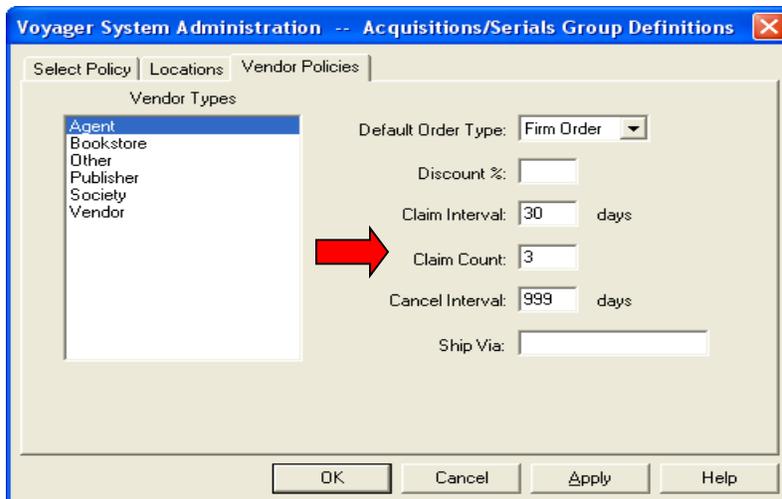
Claim Counts

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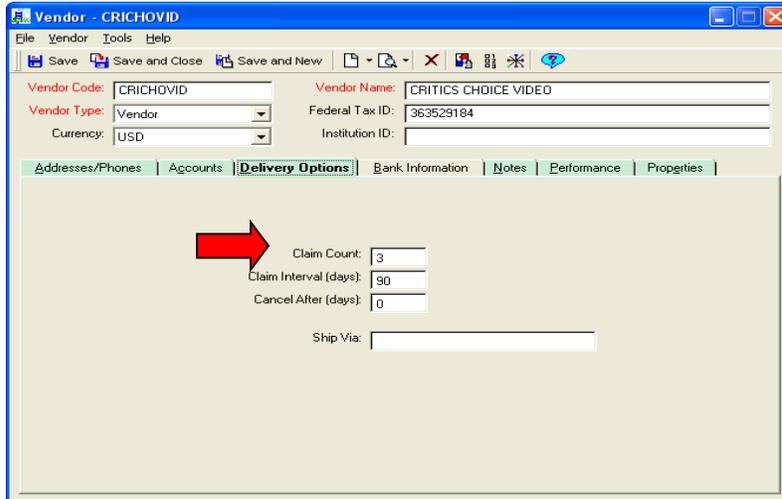
- Level Two: Vendor Policy in System Administration
  SysAdmin → Acquisitions → Policy Definition → Vendor Policies

Not Claiming

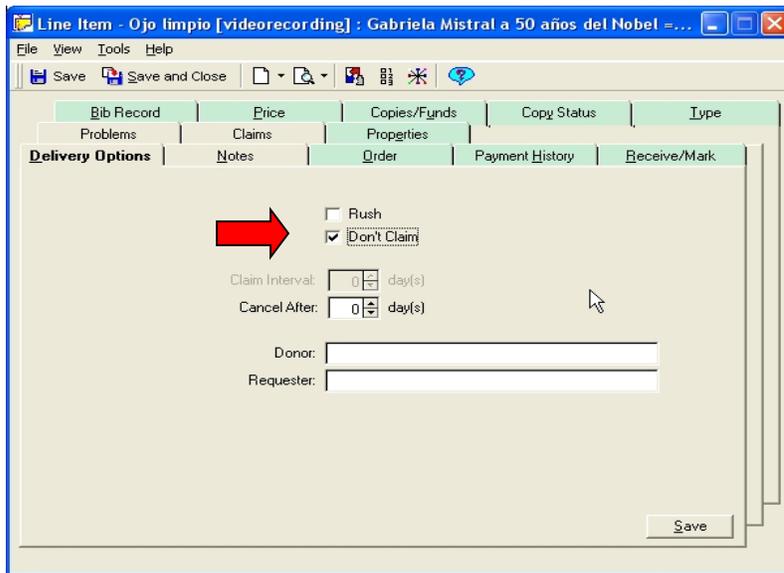There may be situations where claiming is not appropriate or desirable. "Don't Claim" limits can be applied, and no items will be marked for claiming in the following situations:

- "Don't Claim" is checked at the Line Item Level.

  Orders → *Search Orders* → Highlight Line Item → *Details* → *Delivery Options*


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

  Check-In → *Serials Check-In* → Search for title → *Check-In* → *Maintenance* → *Component Details*
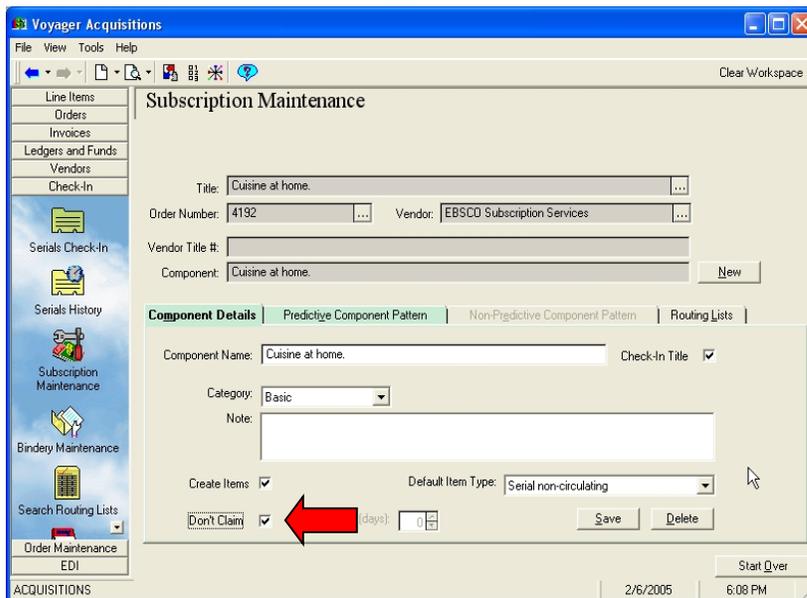
- "Don't Claim" is checked within the Predictive Component Pattern. This will block claims on a single serial issue.
  Check-In → Serials Check-In → Search for title → Check-In → Maintenance → Predictive Component Pattern
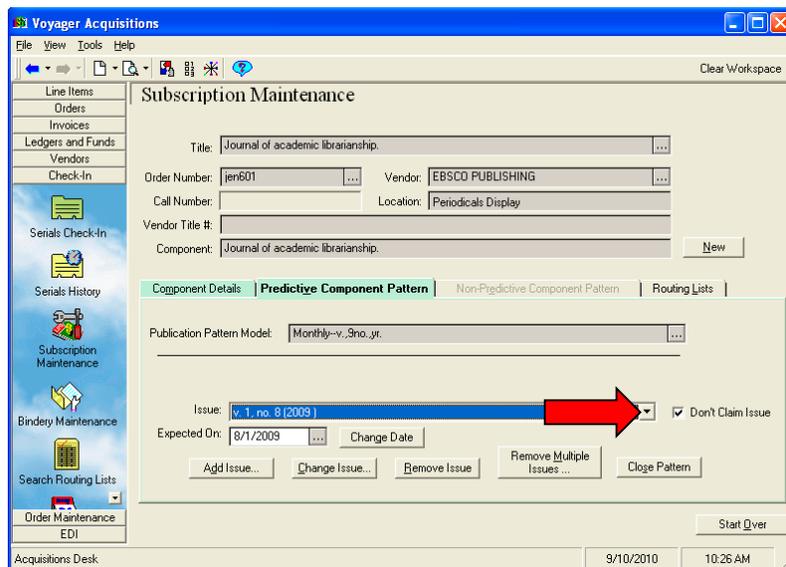
Processing Claims

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