

Voyager Acquisitions/Serials Training

Serials Exercises

For the following exercises, please log into the Acquisitions client with the username and password given to you by your trainer.

Exercise 1: Set up Defaults for Serials Orders

1. Click on the *Set Defaults* button (or select *Tools>Defaults* from the menu bar).
2. On the *Purchase Order* tab, click *Clear* to remove previous settings, if any.
3. Then select the following options:
 - a. Order Site: *Acquisitions Desk*
 - b. Ship To: *Acquisitions Desk*
 - c. Bill To: *Acquisitions Desk*
 - d. Order Type: *Continuation*
 - e. Vendor code: *Vendor you created in Monographs-Exercise 2 yesterday.*
 - f. Vendor Account: *Serials account you created in Monographs-Exercise 2 yesterday.*
4. Under the *Line Item Copies/Fund* tab, click *Clear* to remove previous settings, if any.
5. Then select the following options:
 - a. Intended Location: *Periodicals Room*
 - b. # of Copies: *1*
 - c. Ship To: *Acquisitions Desk*
 - d. Fund: *Select one of the serials funds from the "FY2017" ledger.*
6. Click *OK* to save your settings. Your POs will now default to the settings above whenever you create a new purchase order, until they are cleared.

Exercise 2: Create a Serials Purchase Order; Set up a Component, Prediction Pattern, and a Routing List

Exercise 2, Part A: Create the Purchase Order

1. From the Listbar, Click on the *Orders* button, then *New Purchase Order* (or select *View > Orders > New Order* from the menu bar).
2. Create a Purchase Order with the following information in the **header**:
 - a. PO Number: <Your Initials> + Voyager-assigned PO number, e.g., "KH123"
 - b. The following should be filled in for you from your session defaults:
 - Vendor Code and Account
 - Order Site
 - Bill To & Ship To should be set to *Acquisitions Desk*
 - Order Type should be set to *Continuation*
3. Click on the *Save* button to save the Purchase Order. This activates the Line Item section of the PO.
 - a. Add a single line item to the Purchase Order by searching for an existing record in the database:
 - Click on the *Add Line (Bib Search)* button to access the staff search window. Do an ISSN search for '0' or '1'. This will return a list of serial titles.
 - Highlight one and click OK. This places the title as a line item in your PO.
 - Write the title of the serial you added to the PO here:

 - b. Click the *Detailed Line Item* button.
 - On the *Price* tab, leave the price as \$0.00.
 - Look at the *Copies/Fund* tab: it should contain the Session Default settings set in exercise one (for Intended Location, no. of copies, etc.)
 - c. Now select the *Type* tab. Add the following subscription information for the journal title:
 - Line Item Type: Leave as Subscription, (When the Purchase Order Type of Continuation was selected, the default line item type for all line items on this P.O. was set to Subscription.)
 - Starting Piece Identification: Fill in the appropriate monthly enumeration and chronology information for the first issue your library wishes to receive, for example v.2, no.1 (Jan. 2015). This will appear on the Purchase Order to the vendor.

Exercise 2, Part B: Create the Subscription Component

To set up a subscription pattern for the title, it is first necessary to create a Component.

- The first component you create for a title must be created from the *Type* tab in the *Line Item Details* of the Purchase Order.
- Additional components beyond the first one are created through Subscription Maintenance.

We're still on the *Type* tab. Click the *Subscription Pattern* button. The *Subscription Maintenance* window will open. Do the following to create a new component:

1. Click the *New* button.
2. Component Name: Voyager will automatically insert the title from the bib 245 in this field. This is a staff-side description only and is not visible in the OPAC, so you can edit it to best make sense to your staff. There is a 30-character limit in this field. For this exercise, edit the Component Name to add your initials at the end of the title (this is so you can identify your component if others have used the same title for this exercise).
3. Check-in Title: Use this description when searching for the component at check-in. Leave this box checked.
4. Category: The default for this field is Basic. For an index or supplement component, you would select a category of Indexes or Supplementary. Leave this setting as Basic for this exercise.
5. Create Items: Voyager allows for the automatic creation of item records as issues are checked-in. For this exercise, leave this box un-checked.
6. Enter a Claim Interval of 30 days. This interval will be added to an issue's expected date to determine the first date on which the issue will be marked for claiming if it is not received.
7. Click on the *Save* button to create the Basic Component.
8. The Components list should now contain a single basic component.

Exercise 2, Part C: Create a Subscription Pattern for the Component

The final step in the process of setting up check-in records for subscription materials is to set up a Subscription Pattern for each Component. Follow these steps to create a Subscription Pattern for the Component we just created in Part B:

1. With the Subscription Maintenance window still open to the component you just created, click on the *Predictive Component Pattern* tab.
2. Select one of the monthly Publication Patterns (e.g., "Monthly—v.,no.,yr.,mo.")
3. Click on the *Start Prediction* button.
4. Enumeration and Chronology: Enter the enumeration and chronology values for the first issue you expect to receive: for example, v.2, no.1, Year: 2015 Month: Jan.
5. First Issue's Expected Date: Click on the button at the end of the date field. For this exercise, choose today's date. (*In a production environment, you would choose a date based on the expected publication date of the issue plus how long it will take to be delivered.*)
6. Day of the Month Expected: Insert the numeric value of today's date. The **number must** match the **day** indicated in the "First Issue's Expected Date" – for example, if the expected date is Jan. 12, the "Day of Month Expected" must be 12.
7. Click the *OK* button. Voyager will now generate a prediction pattern based upon your information.
8. Click on the dropdown arrow next to "Issue:" to see the Subscription Pattern that has been predicted by Voyager and ensure issues are predicting as expected.

Exercise 2, Part D: Creating a Routing List

1. Click on the *Routing Lists* tab.
2. Click the *New* button.
3. Give the Routing List a name, for example, Library Faculty. Click *Create*.
4. Click the Add Patron button and add Donna Smith and Matthew Ball to the Routing List.
5. *Save and Close* the Routing List.

Exercise 2, Part E: Finishing the Purchase Order

1. Click *Save and Close* on the Detailed Line Item window.
2. **Approve** the PO.

Exercise 3: Create a Second Component / Subscription Pattern

Only the first component of a subscription title needs to be created through the Type tab on a Continuations PO. Subsequent components can be created directly in Subscription Maintenance. We will now add a second component to the subscription we just set up in Exercise 2.

1. From the Listbar, select *Check-In > Subscription Maintenance*.
2. Search for the title of the serial you set up in Exercise 2.
3. Highlight the title and click *Select*.
4. You should be on the Component Details tab.
5. Click the *New* button.
6. Edit the component name to include your initials followed by the word "INDEX" (You may have to truncate part of the title to fit this in.)
7. Check-in Title: Leave this box checked.
8. Category: Change to "Indexes."
9. Create Items: Leave box un-checked.
10. Claim Interval: enter 30 days.
11. Click on the *Save* button to create the Index Component. The Components list should now contain two components.
12. Click on the *Predictive Component Pattern* tab for the component you just created.
13. Select a semi-annual prediction pattern and choose an enumeration, chronology and expected date appropriate to a semi-annual publication.
14. Click on the drop-down arrow to make sure the pattern is predicting as expected.

Exercise 4: Create a Second Serials Purchase Order

We will use this Purchase Order in a later exercise, for Complex Publication Patterns.

Repeat the steps in Exercise 2 through the end of Part B, "Create the Subscription Component." However, DO NOT continue on to Part C ("Create a Subscription Pattern"). Stop after you have completed all steps through the end of Part B.

Write the title of the serial you added to the PO for Exercise 4 here:

Exercise 5: Create a New Regular Publication Pattern

From the Listbar, click on the *Check-In* button, then *New Publication Pattern* (or select *File > New > Publication Pattern* from the menu bar). Create a *Bimonthly* Publication Pattern by filling in the template with the following characteristics:

1. Descriptive Name: Enter your initials, then give the pattern a name and clear description, such as Bimonthly -- v.,no., 6#, restart, yr., mo.
2. Frequency: select Bimonthly
3. Enumeration: Volume (v.) (as Level 1) and Number (no.) (as Level 2). Use an Arabic numbering scheme for both v. & no.
4. Set the max. numbered issues in each volume to 6, and set the continuity to "Restart."
5. Chronology: Year (Level 1) and then Month (Level 2).
6. Click the *Save and Close* button to exit from the Publication Pattern.
7. From the Listbar, click on *Check-In > Search Publication Patterns* (or *File > Search > Publication Patterns*) to search for your newly created Publication Pattern by your initials.

Exercise 6: Create a New Complex Publication Pattern (CPP)

1. Go back to Exercise 4 and make a note of the title for which you created a PO in that exercise:

2. From the Listbar, click on the *Check-In* button, then click on *New Complex Publication Pattern*.

3. We will create a new Complex Publication Pattern by filling in the template following the example for *American Heritage* in your "Complex Publication Pattern Notes" handout. Fill in the initial grid following the example on p. 2 in your handout. Click *Submit* when finished.

4. Revise the second grid as indicated in your handout (p. 3).

- **Tip:** you may need to double-click in some of the fields before you can edit them -- a single click doesn't always seem to work.

5. For the descriptive name, use "CPP: " followed by the name of the serials title you set up the PO for in Exercise 4 and then your initials (e.g., "CPP: Journal of Irreproducible Results SN"). Click "Save and Close" at top of grid.

6. From the Listbar, select *Check-in* then *Subscription Maintenance*. Search for the title of the serial you set up in Exercise 4.

7. Click the "Predictive Component Pattern" tab for your title.

8. Scroll down to the patterns beginning "CPP". Click on the name of Complex Publication Pattern you just created so it is highlighted and click "Start Prediction."

9. Fill in the "Start Complex Prediction" screen according to the example in the handout on p. 5, EXCEPT change the "Year" to "2017" and the "First Issue's Expected Date" from "2/15/2007" to "2/15/2017," then click OK.

10. Look through the issues displayed on the "Predictive Component Pattern" tab to ensure the pattern and expected dates are predicting correctly.

Exercise 7: Check-in

Once a subscription pattern has been generated, it is possible to receive or check-in individual or multiple issues. Use the instructions below to check-in issues for the journal title you set up in Exercises 2 & 4. *(Since you created a Routing List for this title, you will be prompted for routing each time you check-in an issue of the Basic component. Either go back and delete the Routing List, or Save and Close the Routing List each time you check-in an issue.)*

1. From the Listbar, click on the *Check-in* button, then *Serials Check-In*. The Serials Check-in screen displays.
2. Type in the Check-in Title for the serial title you created above and click on the *Check-In* button.
3. The journal title will now appear in the screen. In the Component Name area, select the Basic component from the drop-down list.
4. *Expected Issue/Issue(s) in Hand: Voyager* will indicate the next expected issue. In our example, we will assume that this is the issue we have in hand. (If you actually had a different issue in hand, you would select that issue from the *Issue(s) in Hand* list.)
5. *Quick Check-In*: Most of the time you can use the *Quick Check-In* button for routine check-in. Click on the issue(s) to be checked in, and click *Quick Check-In*. The issue is removed from the Issue(s) In Hand list and goes to the Serials History list.
6. Click on the *Accept...* button to manually send the next issue to the Problems List. *(You can receive also materials using the Accept... button, but it's more cumbersome than using Quick Check-In. Tip: skipped issues are automatically sent to the Problems List. You do not need to mark them.)* To mark an item for inclusion in the Problems List:
 - Highlight the issue to be marked and click on the *Accept* button.
 - Select the item you wish to mark by clicking in the red box next to the item.
 - Choose *Claim* from the Mark Reason Box, then click the *Mark* button. This issue will now be sent to the Problems List.
 - Click *Back* to return to the Check-in screen.
7. Use Quick Check-in (steps 1-5 above) to check-in the next four issues of this title's Basic component. Then skip two issues and check-in the following one.
8. Use Quick Check-in (steps 1-5 above) to check-in the first issue of this title's Index component.

Exercise 8: Serials History

You can view the **Receipt History**, **Claim History**, **Problem History** and **Payment History** for serial issues you have received. Serials History also lets you *Collapse* volumes, suppress issues from the OPAC and *Unreceive* issues.

From the Check-in screen for the serial title you just checked in, click on the *History* button, or click on *Serials History* from the Listbar. Perform the following tasks:

1. Click *Edit issue* to edit an issue you have received (modify title, enumeration, etc.)
2. *Unreceive* some issues.
3. Look at the *Problems History* tab. The 2 issues you skipped and the issue you marked during Check-in above should appear here.
 - a. Unmark the first issue listed.
 - b. Claim the others by highlighting them and clicking *Generate Claim*. Select "no copies received" and click *OK*.
4. Return to Check-in and click the *Start Over* button. Search for your title again. Check in the issues that you *Unreceived* in step #2 and the issue that you Unmarked in step #3.

Exercise 9: Editing Subscription Patterns

The *Add Issue*, *Change Issue*, *Remove Issue*, and *Change Date* buttons in Subscription Maintenance allow you to edit an existing Subscription Pattern to adapt to minor changes, such as extra issues or combined issues, or to remove issues that were not published.

Tip: You can also edit subscription patterns (except for Change Date) directly from the Check-in screen in the same way.

Tip: Voyager will usually not allow you to remove the next-expected issue. To get around this restriction, receive the issue, then go into Serials History and un-receive it (as you did in Exercise 6). Click the 'Start Over' button and search for your title again. The issue will be back on the list of issues eligible to be checked in. This time, however, Voyager will allow you to remove it.

1. From the Listbar, select *Check-In > Subscription Maintenance*.
2. Search for the title of the serial you set up in Exercise 2.
3. Highlight the title and click *Select*.
4. Select the Basic component for your title then click on the *Predictive Component Pattern* tab.
5. Select the first issue of the next volume for the title and perform the following tasks:
 - a. *Add*: Click on the *Add Issue* button to insert an additional issue after the currently selected issue, for example, a special Summer or Winter issue (not a regular supplement). Indicate the date you expect to receive the issue, and click *Add After* to place it in the desired position in the list of predicted issues. (NOTE: follow the form of enumeration and chronology—captions, abbreviations, year before month, etc.—of other issues.)
 - b. *Change*: Select the next issue in the volume and click on the *Change Issue* button to alter the enumeration and chronology in some way. Click *OK* to save your changes.
 - *Tip*: Editing enumeration can be used as an option to removing an issue. If a particular issue is not published, receive it, but edit the enumeration to read: *v. 24 no. 4: Not Published*. Your edited enumeration will appear in the OPAC alerting patrons to the true status of the issue.
 - c. *Remove*: Highlight the third issue in the volume and click the *Remove Issue* button. Voyager will immediately remove the issue without asking you to confirm this action, and it cannot be un-done.
 - d. *Change Date*: To change the expected date of an issue, select the issue from the list of predicted issues, click on a date from the *Expected On* pull-down and then click the *Change Date* button.
 - Voyager will ask you whether you want to change the expected date for all issues or for just the selected one.
 - If you click *Yes*, the due dates of all subsequent issues will be affected.
 - If you click *No*, then only the selected issue will be affected by the change.

Exercise 10: Closing & Re-opening Subscription Patterns

Editing subscription patterns as you did in Exercise 9 allows you to make minor changes to an existing pattern. However, if the subscription pattern changes significantly (for example, a bimonthly publication changes to a quarterly publication, or a weekly publication goes from being published on Wednesdays to being published on Fridays), it is better to "Close" the existing pattern and set up a new one.

Important: Do not *delete* the existing pattern: that will delete all your check-in history with it!

We will assume our Index component is changing from a semi-annual to an annual publication.

1. From the Listbar, select *Check-In > Subscription Maintenance*.
2. Search for the title of the serial you set up in Exercise 2.
3. Highlight the title and click *Select*.
4. Select the Index component of your title then click on the *Predictive Component Pattern* tab.
5. Click the *Close Pattern* button. Click *Yes* when asked to confirm.
6. Select a new annual prediction pattern and choose an enumeration, chronology and expected dates appropriate to an annual publication. Click *OK*.
7. Click on the drop-down arrow next to "Issue:" to make sure the pattern is predicting as expected.

Exercise 11: Single Line Item Invoice: Create Invoice from the PO using "Detailed Line Item"

From the Listbar, click on *Orders*, then *Search Orders* (or *View > Orders > Search*) and locate the PO you created in **Exercise 2**. If you didn't write down the PO number, search for the PO by different criteria (e.g., Date).

Click *Edit...* to open the PO.

From the toolbar menu at the top of the PO, select *Order > Create Invoice*. A new invoice workflow will open.

1. Modify the invoice header with the following information:

- a. Invoice Number: Append the word "INVOICE" to the PO number that displays automatically.

Write the PO number + invoice number here: _____

- b. Leave the system-assigned voucher number as-is.
- c. Invoice Date: will default to today's date. Leave as-is, or click on the drop-down arrow at the end of the date field to open a calendar and select a date.
- d. Vendor Code: will fill in automatically.
- e. Vendor Account: make sure the "journals" account is displaying.
- f. Invoice Amount: Leave blank for now (you will fill in the same amount as in *Total Cost* prior to approving the invoice at the end of the exercise).

2. Edit Detailed Line Item information to add price, discount & shipping charges:

- a. Highlight the line item in the body of the invoice and click on *Detailed Line Item*.
- b. Enter a price of \$25.00.
- c. On the bottom of the *Price* tab, click the *Add* button.
- d. Select a "Charge type" of "discount" and an "application method" of "percent of cost" and enter an "Amount" of "10" (for ten percent). Click *OK*.
- e. Click the *Add* button again.
- f. Select a "Charge type" of "shipping charge" an "application method" of "line item" and an amount of "2.50". Click *OK*.
- g. Click *Save* on the *Price* tab. (Reminder: after entering/editing price data, you must click the *Save* button on the *Price* tab before doing anything else.)

(exercise continues on next page →)

- h. Click the *Notes* tab.
- i. In the "Invoice Piece Identifier" field enter "2017 calendar year subscription." Click *Save* on the Notes tab (at lower right hand corner).
- j. Click *Save and Close* on the upper left of the Detailed Line Item window.

3. **Approving the invoice:**

- a. Edit the *Amount* field of the invoice (upper left corner below the Invoice Date) to match the amount in *Total Invoice Amount*.
- b. Approve the invoice. When the dialogue box for approval opens, ensure the box "receive on approve" is UN-CHECKED, then click OK. (You never want to "receive" items on a Serials invoice, as they are received through the Serials check-in process.)
- c. Close the invoice, then close the original PO.

Exercise 12: Multiple Line Item Invoice: Created "from scratch" using Quick Line Item

From the Listbar, click on *Invoices*, then *New Invoices* (or *View > Invoices > New*). A blank invoice will open.

1. Complete the invoice header with the following information:

- a. Invoice Number: Use your initials followed by any number followed by the word INVOICE. Write the invoice number here: _____
- b. Invoice Date: click on the drop-down arrow at the end of the date field to open a calendar and select a date.
- c. Vendor Code: Use the vendor code created in Exercise 2, Monographs, yesterday. Optionally, select the "Serials" account.
- d. Invoice Amount: Leave blank for now (you will fill in the same amount as in *Total Cost* prior to approving the invoice at the end of the exercise).
- e. **Save** the invoice to activate the *Add Line from Order* button.

2. Adding a line item to the invoice:

- a. Click on *Add Line from Order* and search for the PO created in **Exercise 3**. If you didn't write down the PO number, search for the PO by different criteria (e.g., Date).
- b. Once you've identified the PO that you want to invoice, click the *Display Line Items* button.
- c. Click **in** the red box next to the title to select the line item.
(Optionally, you can click the *MARC* button to open the bibliographic record to ensure you have selected the correct item.)
- d. Click *Append*. This copies the line item onto the invoice.
- e. Click *Close* to close the **Find PO** screen.
- f. Click the *Quick Line Item* button at the bottom of the invoice.
- g. In the "Price" field enter an amount of your choice.
- h. In the "Invoice Piece Identifier" field enter "Subscription 7/1/2016 - 6/31/2017"
- i. Click *Save*.

Tip: To add additional line items to the invoice, you would repeat steps 1-9 above. You could also click on "Detailed Line Item" in Step 6 instead of "Quick Line Item" if you needed to enter per-line-item shipping and handling charges or discounts; these cannot be entered through "Quick Line Item."

3. Adding per-invoice adjustments:

- a. In the *Amounts* area in the invoice header, click on the [...] box next to "Other Charges."
- b. In the "Invoice Fees" window, click *Adjust*, then click *Add*.
- c. Select the *Charge Type* as "shipping charge" and the *Application Method* as "Amount."
- d. Put in an amount of \$10.00 and select a "Journals" fund from which to pay the shipping charges.
- e. Click *OK*.
- f. Click *OK* again to close the "Invoice Fees" window.
- g. Edit the *Amount* field of the invoice (located in the upper left corner of the invoice header below the Invoice Date) to match the amount displayed in *Total Invoice Amount*.
- h. Approve the invoice (make sure the "Receive on Approve" box is UN-CHECKED).
- i. Close the invoice.