Acquisitions Module: Defaults, Preferences, and Workflows

Scope: *This document explains how to configure Session Defaults, Preferences and Workflows in the Voyager Acquisitions Module.*

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Important note: The settings below are intended as general recommendation only; they are not prescriptive. Your settings may vary. Please consult with your supervisor if you believe another setting would be more appropriate for your own workstation.

Defaults:

To configure **Session Defaults** in the Voyager Acquisitions module, select **Options**, then **Session Defaults**. (Keyboard equivalent: Alt + T + D)

Session defaults will vary among processing centers, and within processing centers, may vary among operators and/or sessions. Please consult your supervisor for the appropriate Session Default settings.

Preferences:

To configure **Preferences** in the Voyager Acquisitions module, select **Tools**, then **Preferences**. (Keyboard equivalent: Alt + T + P)

A window with three tabs will appear. Configure these as follows:

Colors and Fonts Tab

Note: The color selections below are intended to assist operators in the identification of transaction information on purchase orders and invoices. It is recommended that staff in all processing units use the color settings outlined below. Those who are color sensitive may need to change some of these settings, but should consult with their supervisor before doing so.

Field Colors

Required field label

Default: Red. Do not change this color.

Default field value

Default: Green. Do not change this color.

Line Item and MARC View Font

Font size

Font bold

Operators may change these settings at their discretion. Be aware, however, that using boldface fonts or enlarging the font may affect the ability to view all of the information on purchase orders and invoices.

Tabs Containing Data

Operators may set their own color for these tabs by clicking the Set Color button.

Line Item Colors

Standard Order

Background color: White (Default.) Do not change this color.

Text color: Black (Default.) Do not change this color.

Standard Invoice

Background color: Change to pink by clicking the radio button next to "Standard Invoice," then clicking the paint can icon. Select the box in row 1, column 7 of the Color window, then click "OK" to return to Preferences.

Text color: Black (Default.) Do not change this color.

Received Complete

Background color: Change to light gray by clicking the radio button next to "Received Complete," then clicking the paint can icon. Select the box in row 6, column 6 of the Color window, then click "OK" to return to Preferences.

Text color: Blue (Default.) Do not change this color.

Received Partial

Background color: White (Default.) Do not change this color.

Text color: Pink (Default.) Do not change this color.

Canceled

Background color: Change to black by clicking the radio button next to "Canceled,", then clicking the paint can icon. Select the box in row 6, column 1 of the Color window, then click "OK" to return to Preferences.

Text color: Change to white (the radio button next to "Canceled" should still be selected; if not, click there to re-select it.) Click the icon with the letter A. Select the box in row 6, column 8 of the Color window, then click "OK" to return to Preferences.

Returned

Background color: White (Default). Do not change this color.

Text color: Brown (Default): Do not change this color.

Searched

Background color: White (Default.) Do not change this color.

Text: Bright pink (Default.) Do not change this color.

Adjusted Amount

Background color: Change to pale blue by clicking the radio button next to "Adjusted Amount," then clicking the paint can icon. Select the box in row 2, column 5 of the Color window, then click "OK" to return to Preferences.

Text color: Black (Default.) Do not change this color.

Line Price

Background color: Change to yellow by clicking the radio button next to "Line Price," then clicking the paint can icon. Select the box in row 2, column 2 of the Color window, then click "OK" to return to Preferences.

Text color: Black (Default.) Do not change this color.

List Bar Tab:

Default Workspace

The **List Bar** Preferences tab is where the user is able to specify the default workspace s/he would like her/his acquisitions client to use. Preferences are linked to each user's signon, allowing two or more users to share a workstation and still retain each user's preferences. The settings chosen here will vary from operator to operator. Consult your supervisor for the appropriate settings.

List Bar Appearance and *Position*

The **List Bar**'s position and appearance can be configured here. Operators may choose their own settings here in consultation with their supervisors.

Sounds and Animation Tab:

The **Sounds and Animation** Preferences tab enables the user to specify whether Tooltips are turned on or off; whether a warning message appears when you are about to delete something; and whether your client will make sounds and use transition screens. Operators may choose their own settings here in consultation with their supervisors. Those working on older machines with slower processors and less memory should not enable transitions, as system performance may be affected.

Workflows:

To configure **Workflows** in the Voyager Acquisitions module, select **Tools**, then **Workflows**. (Keyboard equivalent: Alt + T + W)

A window with six tabs will appear. Configure these as follows:

Searching

Default searches

The settings for default searches will vary from operator to operator. Check with your supervisor for the appropriate settings.

Bibliographic Staff Searching/Import

Retain last search

Check this box.

Automatic truncation for non keyword searches

Check this box

Character set mapping

Choose "OCLC" if you primarily or exclusively import records from OCLC. Select "MARC21" if you primarily or exclusively import records from RLIN. If you move between the two utilities to import records, you will need to change this setting when importing from one or the other. That is, if you are importing from the pass.sav file (RLIN records), you need to select MARC21; if importing from the export.dat file (OCLC records), you need to select OCLC. Failure to select the proper setting may result in problems with diacritics and other special characters (e. g., super- and subscripts.) In case of doubt, consult your supervisor about character set mapping.

Line Items:

Quick line items

Enable Quick line items upon add

Check this box

Enable Quick line items for edit/view details

Check this box

Open line item window after saving

Do not check this box

Monographic receive processing

Auto-select all copies during receive

Do not check this box

Expand receive tree during receive

Check this box. You must also select either "to location level" or "to copy level" when checking this box. This setting may vary from operator to operator. Consult your supervisor for the appropriate setting.

Show line item relations

Click the box next to Show line item relations as well as all of the boxes beneath it (Marked line items, Marked issues, Claimed line items, Claimed issues.)

Note: at present, it is not actually possible to select the "Show Components" radio button that appears under "Show Line Item Relations." The system automatically de-selects it after the user selects it.

Item Creation:

Item Records:

First Copy Numbered As:

Set this number to 1 (one).

Default Item Status:

Leave this field blank.

Use the list price from the order line

Do not check this box.

Item Creation from Order:

Automatically Create at Receive

Do not check this box.

Note: this setting may vary depending on where you work. Check with your supervisor for the appropriate choice.

Show Item Record on Create

Check this box.

Note: this setting may vary depending on where you work. Check with your supervisor for the appropriate choice.

Sequence New Items at Top

Do not check this box.

Item Creation from Invoice:

Automatically Create at Receive

Do not check this box.

Note: this setting may vary depending on where you work. Check with your supervisor for the appropriate choice.

Show Item Record on Create

Check this box.

Note: this setting may vary depending on where you work. Check with your supervisor for the appropriate choice.

Sequence New Items at Top

Do not check this box.

Item Creation from Serials Check-in

Show Item Record on Create

Check this box.

Check for Duplicate Item Barcodes:

Check this box.

Serials Check-In

Display copies received/counts in "Issues in Hand"

Check this box.

Automatically route serials

Do not check this box

Display check-in recap window

Check this box

Perform item maintenance during check-in

Check this box

Use persistent check-in notes

Check this box

Serials receive processing

Auto-select all copies during receive

Check this box

Expand receive tree during receive

Check this box, and also select "to location level" below it.

Claim Processing:

EDI

Do not check this box.

Printer

Check this box.

Approve Processing:

Purchase Orders

Print purchase order

Do not check this box.

Transmit via EDI

Do not check this box.

Check for duplicates

Check this box

Receive on approve

Do not check this box

Invoices

Print Voucher/Check Request

Check this box.