

# Acquisitions Module: Defaults, Preferences, and Workflows

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

**Contact:** [Jesse Koennecke](#)

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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.

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**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.

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**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.

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### **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.

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### **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.

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## **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.

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## **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.*

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## 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.

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**Claim Processing:**

*EDI*

Do not check this box.

*Printer*

Check this box.

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**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.