

# Acquisitions Glossary

**Scope:** This glossary covers the list of terms, concepts, and some policies specific to Voyager Acquisitions at Cornell. Please contact the official contact person for additions, changes, or deletions.

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[Adapted from the Library of Congress Voyager glossaries]

## Acquisitions Module

Voyager module for managing the library's purchases, gifts, exchanges, etc., and the activities associated with them. It contains five main data entities: vendor records, ledgers and funds, purchase orders, invoices, and serial check-in records. These records link to each other and also to records in the bibliographic database.

## Allocated Fund

Allocated funds (preceded by a blue triangle) are subordinate to summary funds. In addition, allocated funds contain real money and your commitments and expenditures take place using them. An allocated fund can be set up to have additional money added to it during the course of the fiscal period for expenditures only (a dollar amount allocated for an entire fiscal period from budget or for a deposit account). An allocated fund can also be set up with no money allocations to handle exchange, gift, copyright, or deposit requests.

## Alternative Enumeration and Chronology --- see also: Enumeration, Chronology

Used with serials that show two types of numbering and/or chronological designation simultaneously. Example: [Library hi tech](#), v. 32, no. 2 (consecutive issue 135). The vol/no. is the primary enumeration and the consecutive issue is the alternative enumeration.

## Barcode

A type of code used on labels to be read by a scanner used to identify library items.

## Begin Date

A display of the beginning date for a fund's activities.

## Bill To

Refers to the location that is billed for a purchase order item or the location that is billed for an invoice line item. The location that you can select depends on the authority you have as an operator.

## Bypass Prediction --- see: Prediction

## Cancel After (days)

Allows you to enter a maximum number of days exceeded before unreceived purchase order is canceled.

## Caption --- see: Enumeration

## Check-in Notes

Free-text field where one can enter any check-in information.

## Chronology

Date information that identifies a particular issue of a serial, e.g., day, month, season, etc., and year. Along with frequency statement on the piece, chronology information helps determine a serial's publication pattern.

## Claim Count

A display of the total number of claims for unreceived purchase order items.

## Claim Interval (days)

The number of days between claim intervals for an unreceived purchase order.

## Claims List

A display of a list of claims that has been sent from the Acquisitions Problem List. When you generate a line item claim from the Problem List, the line item can be searched in the Claims List.

## Collapsing --- see also: Condensing

Summary statement of cumulative holdings for a particular title.

## Combine/Omit

This button shows up when certain publication patterns are selected in Start Prediction dialog box. Issues can be combined or omitted entirely.

## Component

A part of a serial title that is synchronized to a publication pattern. A serial title is made up of one or more components. There are three types of publication components: basic, supplement, and index. These are also known as component categories. Example: [Radiology](#) is a monthly with special Apr. issue and an annual index. Three components are associated with this title: a basic component for the monthly issues, a supplement component for the annual special issue, and an index component for the annual index. Each of these three components can be attached to a different publication pattern (in this case, monthly, annual, and annual).

## Component Category --- see: Component

**Currency**

The predefined currency set up in the Currency Maintenance activity using the International Standard Organization (ISO) codes. Allows you to choose what currency you want to use for purchase order or invoice processing.

**Currency Maintenance**

Used to create and maintain the types of currency that are available for purchasing library items.

**Dialog Box**

Requires the user to enter data to complete the "dialog."

**Display in Base Currency**

Allows you to display the purchase order in the base currency (i.e., USD) when working with foreign currency.

**EDI**

Electronic Data Interchange that is a means of communicating with your vendor electronically.

**Ellipsis**

An indication that additional information is available. Additional information is accessed by clicking on the ellipsis button.

**End Date**

A display of the ending date for a fund's activities.

**Enumeration**

The numbering that appears on an issue of a serial. Each such number is assigned an enumeration caption, e.g., Volume, No., Issue, Part. For foreign terms, use the English equivalent.

**Expend Only**

Allows you to expend a fund's resources, but not encumber them.

**Federal Tax ID**

Identification for federal tax.

**Fiscal Period Close**

Allows you to rollover open orders from a previous fiscal period to a new fiscal period by committing amounts in the new fiscal period's funds according to rollover rules set for each line item type for each purchase order type.

**Footer**

Located at the bottom of a purchase order or invoice screen and displays fields (boxes) to enter information related to all items on the PO or invoice.

**Freeze Date**

Date that will stop overcommitments or overexpending in a ledger or a particular allocated fund within a ledger.

**Fund Category**

A display of a fund's type, i.e., Summary, Allocated or Reporting.

**Fund Name**

A display of a fund's descriptive name.

**Header**

Located at the top of a PO or invoice and contains information needed to acquire or pay for library items as well as to search for a PO or invoice in future sessions.

**Holdings Record**

A record of all the holdings information for a bibliographic record. Each holdings record has a leader, fixed field, variable fields, and can include location (field 852), summary holdings (field 866) and material category (field 007).

**Institution ID**

This is the ID used by the vendor to identify your institution as a customer.

**Invoice**

An invoice handles expenditures. An invoice will expend the exact amount charged for an item and remove that amount from commitments.

**Invoice Amount**

A display of the price cited on a vendor's invoice.

**Invoice Date**

The date that an invoice was created by the vendor.

**Invoice Number**

The number that appears on a vendor's invoice and used to identify a Voyager invoice. The invoice number is editable and can contain up to 26 characters.

**Item Record**

A record for a physical object (book, serial issue, cassette, etc.) owned by the Library and treated as one entity for identification and circulation purposes. The record includes such information as location, item type, barcode and copy number.

**Ledger**

A ledger (preceded by a red square) contains a hierarchy of funds within the same fiscal year. They control a set of rules governing the behavior and availability of funds. They tell you *who* has access to money, *when* one can use given funds, and *where* in the library funds can be used. Ledgers can be associated with one or more policy groups.

**Ledger Name**

The descriptive name of a ledger.

**Line Item**

A bibliographic record brought into a purchase order or invoice. Line item types include: single-part, multi-part, blanket order, standing order, approval, membership, subscription.

**Line Item Information**

Located in the middle portion of a purchase order or invoice window displaying fields to enter an actual item and its bibliographic data.

**Line Item Subtotal**

The subtotal amount of the line items on a purchase order or the price for the line items on an invoice.

**Line Item Type**

Includes approval, single-part, multi-part, blanket order, standing order, membership and subscription.

**Location**

The place where an item resides after accessioning, i.e., the routing or assignment; a location can be permanent or temporary. Also, the place where a particular activity occurs, e.g., check-in location.

**Marking for Review**

A serial item can be marked for review in order to track particular situations, e.g., title changes. Any number of "mark" reasons can be defined.

**MFHD** see also Holdings Record

The MARC Format for Holdings Data provides the structure for Voyager's holdings records. Sometimes referred to as "muff-head."

**Multi-part Subscription**

A subscription to a serial which is made of multiple components, each with its own publication pattern.

**Not Needed After (date)**

The latest date after which an unreceived purchase order is not needed.

**Omit** --- see: Combine/omit

**Order Site**

Location from which a purchase order originated; defined in the System Administration Module.

**Other Charges**

Contains additional charges for your purchase order or invoice such as shipping.

**Pattern** --- see: Publication pattern, Subscription pattern

**Policy Group**

Locations in the Library that are authorized to use funds in a ledger. Policy groups are defined in the System Administration Module.

**Prediction**

Establishing enumeration/chronology values for first expected issue, after selecting a publication pattern. **Start Prediction** dialog box is where one establishes enumeration/chronology values for first expected issue. The **Bypass Prediction** option allows manual input of dates for next expected issue.

**Problem List**

Allows you to view a list of ordered items that are not satisfactory in ways such as received incorrect edition, damaged, or not received. Items may appear on the **Problem List** either automatically or through the intervention of the operator.

**Publication Pattern**

A publication pattern is created to describe a generic template for enumeration and chronology descriptions in which some serial titles are received (monthly, quarterly, vol., no., etc.). Once a pattern is created it can be used for multiple serials. Using a pattern gives the capability to predict the issues that one will be checking in next. An unlimited number of patterns can be created. Frequency choices are based on USMARC values (which has maximum frequency as triennial), so for any other pattern one would need to bypass prediction. While prediction may be bypassed, it is required that a pattern be selected for each serial component.

**Purchase Order**

Any order, request, demand for library material regardless of mode of acquisition. For ordered items, the purchase order handles the commitment of funds that are earmarked and set aside to pay for an item once it is received.

**Purchase Order Number**

A system generated number that appears on the purchase order. The purchase order number is editable and can have up to 26 characters.

**Receiving/Marking Dialog Box**

Receiving dialog box displays when clicking on Accept button from Serials Check-in dialog box. One can receive or mark all copies for a location, certain copies for a location, or all copies for all locations.

**Reporting Fund**

Reporting funds (preceded by a yellow circle) are subordinate to allocated funds and do not have money in them, but they can be used on purchase orders and invoices. Money to pay for invoice items comes from a reporting fund's parent allocated fund. Reporting funds are used to generate detailed information about the expenditures from that allocated fund.

**Retrieve Holdings**

Retrieval of MARC record holdings for a serials bibliographic title record.

**Serials Receipt History**

An informational dialog box that displays the serial issues, receive dates, and copies received.

**Ship To**

Refers to the location that the purchase order items will be sent. The location that you can select depends on your authority as an operator.

**Ship Via**

An indication to a vendor of the desired shipping method of ordered items (e.g., surface, UPS).

**SICI**

Serial Item and Contribution Identifier. A code that uniquely identifies individual serial issues and the contributions they contain (articles, table of contents, etc.). It can be barcoded. The ISSN is a key part of a SICI.

**Status Date**

The date that the status of a purchase order or an invoice status was last modified in Voyager.

**Subscription Pattern**

Links a serial component to the particular publication pattern that it falls into. The current list of publication patterns is the universe from which you can select the one that matches the serial component at hand. If no matching publication pattern exists yet, one must be created before the subscription pattern can be specified. Besides component name/type and its publication pattern, the subscription pattern dialog box includes history of checked-in issues and list of expected issues.

**Summary Fund**

Summary funds (preceded by a red square) do not have allocations (money). They allow you to gather a summary of information about all of its subordinate funds. Analyzing fund activity at the summary fund level allows you to see the expenditure activities of all allocated and reporting funds associated with the summary fund.

**Total Cost** The total price of a Voyager invoice.

**Total Purchase Order Amount**

The total purchase order price.

**Total Quantity**

Indicates the total number of invoice line item copies.

**Vendor**

Any supplier of library material regardless of mode of acquisition (i.e., exchange, gift, purchase, copyright, transfer, etc.).

**Vendor Accounts**

A display of defined accounts for a vendor used for different types of orders which may have discounts associated with them. A vendor account is required if you want a default order type or a default discount percentage associated with a particular vendor.

**Vendor Code**

Identifies which vendor you are using for your purchase order or which vendor is providing an invoice line item.

**Vendor Type**

A system supplied category describing the general parameters governing the vendor.

**Voucher ID**

Refers to a locally assigned ID for an invoice voucher.