Claims and Claim Dates in Aleph

This document includes information on the following:

- Claims in Aleph
- How Claim Dates on orders are set
- Claim Dates for Monograph (M) and Serial (S) orders
- Claim Dates for Standing Orders (O)
- How to change Claim Dates on orders
- Claim reports in Aleph
- How to submit questions about claims or claim reports

Claims in Aleph

There are two ways to produce a claim for an order:

- on demand
  - operator-initiated on Orders tab
  - claims are printed immediately at the workstation

- batch claiming
  - available for Monograph orders only
  - Batch Claiming flag on Tab 3 of order must be checked
  - claims are printed in batch by Print Operator

There are three formats for order claims or memos:

01 Claim (no vendor notes)
  - includes standard claim text
  - does not include Vendor Note, Quantity Note or Price Note
  - you may add text to the claim by typing it in the Claim text field

02 Memo (order info only)
  - includes bibliographic information only
  - does not include Vendor Note, Quantity Note or Price Note
  - you may add text to the memo by typing it in the Claim text field

03 Claim (includes vendor notes)
  - includes standard claim text
  - includes Vendor Note, Quantity Note and Price Note

Form 03 is used for monograph batch claims
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There are two ways to produce a claim for a serial issue:

- on demand
  - operator-initiated on Serials tab
  - claims are printed immediately at the workstation

- batch claiming
  - Send Claim on Tab 3 of Subscription record must be set to Yes
  - claims are printed in batch by Print Operator

*NOTE: Batch claiming for serial issues is not yet available.*

**How Claim Dates on orders are set**

For all Order Types, the initial Claim Date on an order is set when you click on the Send button (or when you click on Add if you have set Order Status to SV manually). If you do not want the system to calculate the Claim Date, enter a specific date in the Claim Date field on Tab 3 of the order record. When the Claim Date has passed, the order will appear on the Claim Report for Monograph Orders, the Claim Report for Standing Orders, or the Claim Report for Serial Orders.

For Serial (S) orders, the Claim Date on the order is only relevant until a Subscription and Items have been created. Once the Subscription and Items have been created, the order will no longer appear on the Claim Report for Serial Orders. Items will appear on the Claim Report for Serial Issues when the Expected Arrival Date on the item has passed.

**Claim Dates for Monograph (M) and Serial (S) orders**

For Monograph (M) and Serial (S) orders, the Claim Date is calculated automatically based on values in the Delivery Delay fields in the vendor record (values are taken from the Order Unit vendor record, if there is one; otherwise from the master record). Here are the default values for Delivery Delay from the master vendor record:

<table>
<thead>
<tr>
<th>Delivery</th>
<th>Delivery Delay</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 (ACQ)</td>
<td>90</td>
</tr>
<tr>
<td>2 (ACQ)</td>
<td>30</td>
</tr>
<tr>
<td>3 (ACQ)</td>
<td>10</td>
</tr>
<tr>
<td>4 (SER)</td>
<td>90</td>
</tr>
<tr>
<td>5 (SER)</td>
<td>15</td>
</tr>
</tbody>
</table>

*Figure 1: Delivery and Delivery Delay fields in master vendor record*
The options for Delivery 1-5 in the vendor record are:

S  Surface Mail
A  Airmail
O  Seamail
C  Courier

Delivery 1-3 (ACQ) are used for Monograph (M) orders. Delivery 4-5 (SER) are used for Serial (S) orders.

When you create a Monograph (M) or Serial (S) order, you select one of these options in the Delivery Type field in the order record.

If you select Surface Mail (S) as Delivery Type for a Monograph (M) order, the system will calculate the Claim Date as the Order Date plus 90 days (assuming the values are coming from the master vendor record). The value used is from Delivery Delay 1.

If you select Airmail (A) as Delivery Type for a Monograph (M) order, the system will calculate the Claim Date as the Order Date plus 30 days (assuming the values are coming from the master vendor record). The value used is from Delivery Delay 2.

If you select Courier (C) as Delivery Type for a Monograph (M) order, the system will calculate the Claim Date as the Order Date plus 30 days (assuming the values are coming from the master vendor record). The value used is from Delivery Delay 3.

If you select Surface Mail (S) as Delivery Type for a Serial (S) order, the system will calculate the Claim Date as the Order Date plus 90 days (assuming the values are coming from the master vendor record). The value used is from Delivery Delay 3.

If you select Courier (C) as Delivery Type for a Serial (S) order, the system will calculate the Claim Date as the Order Date plus 30 days (assuming the values are coming from the master vendor record). The value used is from Delivery Delay 4.
Claim Dates for Standing Orders (O)

For Standing Orders (O), the Claim Date is calculated automatically based on the value in the Max. Arrival Days field on Tab 3 of the order record.

![Figure 3: Max. Arrival Days field in Standing Order record](image)

The vendor record is not used for claim dates on Standing Orders. The value in the Delivery Type field of the order record is irrelevant.

If you enter 180 days in the Max. Arrival Days field on **Standing Order (O)**, the system will calculate the Claim Date as the Order Date plus 180 days.

Here is a Max. Arrival Days calculator for translating years into days:

<table>
<thead>
<tr>
<th>YEARS</th>
<th>DAYS</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>730</td>
</tr>
<tr>
<td>3</td>
<td>1095</td>
</tr>
<tr>
<td>4</td>
<td>1460</td>
</tr>
<tr>
<td>5</td>
<td>1825</td>
</tr>
<tr>
<td>6</td>
<td>2190</td>
</tr>
<tr>
<td>7</td>
<td>2555</td>
</tr>
<tr>
<td>8</td>
<td>2920</td>
</tr>
<tr>
<td>9</td>
<td>3285</td>
</tr>
<tr>
<td>10</td>
<td>3650</td>
</tr>
</tbody>
</table>

**Best Practice recommendation from the Acquisitions Advisory Team**

The Acquisitions Team recommends that Max. Arrival Days be set to no more than 3650 days (i.e. 10 years).

For all Order Types, you may change the Claim Date by changing the Claim Date field in the order record.

![Figure 4: Claim Date field in Monograph (M) order record](image)

Revised: September 9, 2006
For all Order Types, you may also change the Claim Date when you create a claim on the order.

To set your own Claim Date, uncheck the Auto Update Claim Date box and enter a date in the Claim Date field in the Save Information section of the Claim Form.
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For Monograph (M) and Standing Orders (O), you may also change the Claim Date when you record an arrival (arrivals are not used for Serial orders).

![Auto Update Claim Date box and Claim Date field on Arrival Form](image)

To set your own Claim Date, uncheck the Auto Update Claim Date box and enter a date in the Claim Date field on the Arrival Form.

Claim Reports

There are four claim reports in Aleph:

- Claim Report for Monograph Orders
- Claim Report for Serial Orders
- Claim Report for Standing Orders
- Claim Report for Serial Issues

A report which lists orders with expired Action Dates in the Order Log is also available:

- Order Log Report

The Claim Reports for Monograph Orders and the Claim Report for Standing Orders list orders where the Claim Date in the order record has passed.

The Claim Report for Serial Orders lists orders where the Claim Date in the order record has passed if the order has no Subscription and Item records attached.

The Claim Report for Serial Issues lists items where the Expected Arrival Date has passed.

The Order Log Report lists orders where an Action Date in the Order Log has passed.

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Separate documents describing these reports in more detail are available in the Aleph Documentation Center.

**How to submit questions about claims or claim reports**

Please send questions or report problems with claims through the Aleph Support Center. Use the Acquisitions/Financial Processing category. The URL is …