Email Claims in Aleph

**Best Practice recommendations from the Acquisitions Team**

- We recommend that each Order Unit establish clear policies on email claims and communicate those policies to all staff in the unit.
- We recommend that you contact the vendor before sending email claims to make sure that they will accept the claims. Some vendors may request a sample email claim. If you need a sample claim, please contact OIS via the Aleph Support Center and choose the Acquisitions/Financial category: [http://hul.harvard.edu/ois/support/support-aleph.html](http://hul.harvard.edu/ois/support/support-aleph.html)

Requirements for sending claims by email:

- The Master Vendor Record must have a valid email address on either the Claim Address tab or the Order Address tab
- The workstation must be configured to send email from Aleph
- List Orders must have an Order Unit vendor record with a valid email address

**A. Email addresses in vendor records**

To determine whether there is an email address in a master vendor record:

- a. Open Aleph in the Acquisitions/Serials module and click on the **Administration** Tab and then on **Vendors** to open the **Vendor List**

- b. Highlight the appropriate vendor

- c. Click on the Address button on the right

- d. Check the E-mail field on the Claim Address tab. If there is no email address on the Claim Address tab, check for email address on the Order Address tab (the email address in the order tab will be used if there is no email address on the Claim Address tab)

If there is no appropriate email address in the master vendor record, request that one be added. Master vendor records are maintained by staff in the HCL Financial Office. Submit requests to add an email address to an existing vendor record using the Aleph Vendor Request Form at…


**Please note:** Because email addresses are entered at the master record level, the email address must be one that can be used by all library acquisitions departments.
B. Workstation configuration for email claims

Your workstation must be configured for email claims.

Please consult with your IT Department before making changes to the ALEPH client on your desktop.

1. The following information must be added to the MAIL section of the Alephcom.ini file (AL500XXX/Alephcom/Tab/Alephcom.ini). If this information has already been added for email orders, skip to step 2:

   MailServer=[your mail server address]
   FromAddress=[your department email address]
   MailerName=[your department name]

   Example (this is a generic HCL example; be sure to use the correct information for your own unit):

   Mailserver=smtp.fas.harvard.edu
   FromAddress=acqdept@smtp.fas.harvard.edu
   MailerName=Library Acquisitions Department

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Best Practice recommendations from the Acquisitions Team

- We recommend that you set up an email account for your acquisitions department (rather than using a personal email account)
- We recommend that you configure all workstations in the acquisitions area in the same way so that anyone can use any workstation for placing orders

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2. The mail default for claim letters in the print.ini file in the Acquisitions module must also be set to allow email claims at the workstation (AL500XXX/Acq/Tab/Print.ini).

   The choices for mail default are:

   M  Allow email claims
   P  Allow print claims only
   B  Send email and print claims

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If there is an email address in the vendor record and your department’s email address has been entered correctly and appropriate values have been set in order or vendor record to allow email claims and …

… your mail default is set to M, your claim will be sent by email;

… your mail default is set to P, your claim will be printed;

… your mail default is set to B, your claim will be sent by email and printed.

We recommend that you set the default to M (if you set it to B so that the claim is sent by email and printed, you may end up sending duplicate claims to the vendor).

Example:

ClaimLetter   00 N M claimltr.prn

C. Sending claims by email

Once an email address has been added to a master vendor record and your workstation has been configured properly, you will be able to send claims by email. The process for sending emails claims for LE (Letter) orders and LI (List) orders is different.

1. Email claims for orders where Order Delivery Type is set to LE (Letter)
   a. Check that EMAIL is selected for Send Letter By field on Tab 3 of order record
   b. Make sure printing is set to Normal Printing (right-click on printer icon in lower right corner of screen)

       PLEASE NOTE: Order will not be sent by email if printing is set to Preview

   c. Create claim as usual
   d. Click on Add and the claim will be sent by email (you will see a message briefly flash by that says “Sending to …” with the email address that is being used)

The claim will be printed in the text of the email message.

The claim will also be sent as an attachment to the email message (the format of the attached claim is the same as a regular printed claim).

The From address on the email message will be your department’s name and email address.

The Subject line will read Claim.

Keep in mind that you cannot retrieve a claim sent by email. Be sure to review the claim before you click on Add!
2. Email claims for orders where Order Delivery Type is set to LI (List)

For orders where Order Delivery Type is set to LI (List), there is no Send Letter By option displayed on Tab3 of order record. The system uses the value in the Letter Send Method field of the vendor record. Since the Letter Send Method in the master vendor record is always PRINT, you must have an Order Unit vendor record to send email claims for these orders.

Note that the system is using Letter Send Method rather than List Send Method (which is used for List orders). This is because all claims are letters (only one title per claim). There are no list claims (multiple titles per claim).

   a. Check that EMAIL is selected for Letter Send Method field in your Order Unit vendor record.

   b. Make sure printing is set to Normal Printing (right-click on printer icon in lower right corner of screen)

      NOTE: Order will not be sent by email if printing is set to Preview

   c. Create claim as usual

   d. Click on Add and the claim will be sent by email (a message will briefly flash by that says “Sending to …” with the email address that is being used)

The claim will be printed in the text of the email message.

The claim will also be sent as an attachment to the email message (the format of the attached claim is the same as a regular printed claim).

The From address on the email message will be your department’s name and email address.

The Subject line will read Claim.

Keep in mind that you cannot retrieve a claim sent by email. Be sure to review the claim before you click on Add!

3. Email claims for orders where Order Delivery Type is set to LI (List) [ALTERNATE METHOD]

If you’d rather not think about the vendor record when trying to email a claim for an order that was originally sent as part of a List, you can change the Order Delivery Method to Letter and set Send Letter By to EMAIL in the order record then follow the steps outlined in #1 above. You will lose the information that the order was originally sent as a List but, if that’s important, you could add a note about it somewhere in the order record.

[See the next page for an example of an email claim]
Example of email claim:

From: "OIS Acquisitions Dept." <oisacq@harvard.edu>
To: <claims@vendor.com>
Date: Fri, 19 May 2006 17:25:22 -0400
Subject: Claim

05/19/2006
acq-order-claim-01-00
[For your convenience, a copy of this claim is also included as an attachment.]

CLAIM

FROM:
OIS Library
Harvard University
Cambridge, MA 02138 / USA

TO:
Yankee Book Peddler
999 Maple Street
Contoocook, NH 03229-3374

We have not yet received this material. If you cannot supply, please report. If shipment has already been made, please advise.

Order No.: 857199-1
Order Date: 05/17/2006
Claim Date: 05/19/2006
No. of Copies: 1
ISBN/ISSN: 0394512243:

Drabble, Margaret, 1939-
The middle ground / Margaret Drabble.
1st American ed.
277 p. ; 22 cm.

This is Claim Text.
D. Order Unit vendor records and email orders

Enter the vendor’s contact name or the library’s account number in the Order Unit Vendor Record to include this information in the email message (and on the attached claim).

There are two account number fields: Account No.(M) prints on Monograph orders and Account No.(S) prints on Serial and Standing Orders.

See document Order Unit vendor records in Aleph for more information on Order Unit vendor records. This document is available on the web at …

http://hul.harvard.edu/ois/systems/aleph/docs/order_unit_vendor_records.pdf

E. Departmental email addresses

Departmental email addresses may be added to the return address for your Order Unit. Submit requests to add email addresses through the ALEPH support website (use category: Acquisitions/Financial) at…

http://hul.harvard.edu/ois/support/support-aleph.html

Note that this email address will appear on all orders and claims (not just orders and claims sent by email).

Please send questions about email claims to the Aleph Support website at …

http://hul.harvard.edu/ois/support/support-aleph.html