Discover how to work with claims in OLIB Acquisitions.

Overview

The Daystart process checks the database for all order items which are overdue or incomplete and have not yet been claimed. It checks that the automatic claim cycle has not been suspended for that order item. Finally, it checks the relevant claim sequence and, if appropriate, generates a claim. Daystart also generates second and subsequent incomplete and overdue claims in accordance with the claim sequences defined in the reference data.

The Daystart process also generates claim headers for individual claim types to individual suppliers. It continues to "add" claims to this header until such time as the header is flagged as Printed. After the Claim Header is set to Printed and the Daystart process is next run, a new claim header is generated for the relevant claim type and supplier.

View claims

There are a number of places where you can view the notices generated:

- The Claims History displayed in the Order Items> Claims layout.
- The Alerting> Alerts domain where all alert emails can be searched.
  
Note: Use the Refine function to search on a specific alert notice, e.g. Mono/Serial Order Claim.

Enter supplier responses

- Acquisitions > Order Items

As claims are sent to suppliers, you can record the responses as follows. The different responses should first be configured in claim event types. When a supplier sends a response you can then select them for a specific order item. If the supplier responds with something like Out of Print you can also set the claiming for that order item to 'suspended'.

You enter any responses from the Supplier on the Claims History attached to the Order Item.

1. In Order Items search for the item that the Supplier has responded about.
2. To add a step in the history go to the Claims sheet and click New in Claim History.
3. To add the event, in Event Type click Search and insert an appropriate Supplier Response from the choice of events displayed, e.g. Reprinting.
4. Save the Event Type to the Claim History and save the change to the Order Item. If you need to suspend claiming for this order item as a result of the supplier response, set Suspend Odue Auto Claim to Yes (or Suspend Missing Auto Claim to Yes if delivery of all the copies is incomplete).
Suspend claiming

• Acquisitions > Order Items

If an order item is reported to be e.g. Out of Print, or for whatever other reason you need to stop the claiming cycle, this is done in the Order Item.

1. In Order Items search for the item that you want to suspend claiming on.
2. Go to the Claims sheet and to stop claiming on an entire order item set Suspend Odue Auto Claim = Yes.
3. To stop claiming for any copies still outstanding - an incomplete delivery, set Suspend Missing Auto Claim = Yes.

Note: In general do not edit Overdue Claim History and Missing Claim History. These are set to Yes by OLIB whenever there is an automatic claim generated. Only if you create a manual claim should you legitimately set them to Yes.

Print a claim header

If you choose not to use Alerting for claims they can be printed instead. The Daystart process generates claim headers for individual claim types to individual suppliers. It continues to 'add' claims to this header until such time as you flag the header as Printed. After the Claim Header is set to Printed and the Daystart process is next run, a new claim header is generated for the relevant claim type and supplier.

1. In Acquisitions go to Claim Headers.
2. Search for the specific supplier or a wildcard% search.
   Note: A filtered search with the Status set to Printed = No is useful.
3. Look at the details to see the list of items to be included in the letter.
4. Click Print to output the letter as pdf and choose the orientation Portrait or Landscape.
5. Once you have printed /dealt with the Claim Header, set this record to Printed.

Delete a claim header

It is possible to delete a claim header record and its associated events:

1. Display the claim header details.
2. Click the Delete Record link above the layout. OLIB prompts you before deleting the data.